

# Reading Commercial Development Needs Assessment

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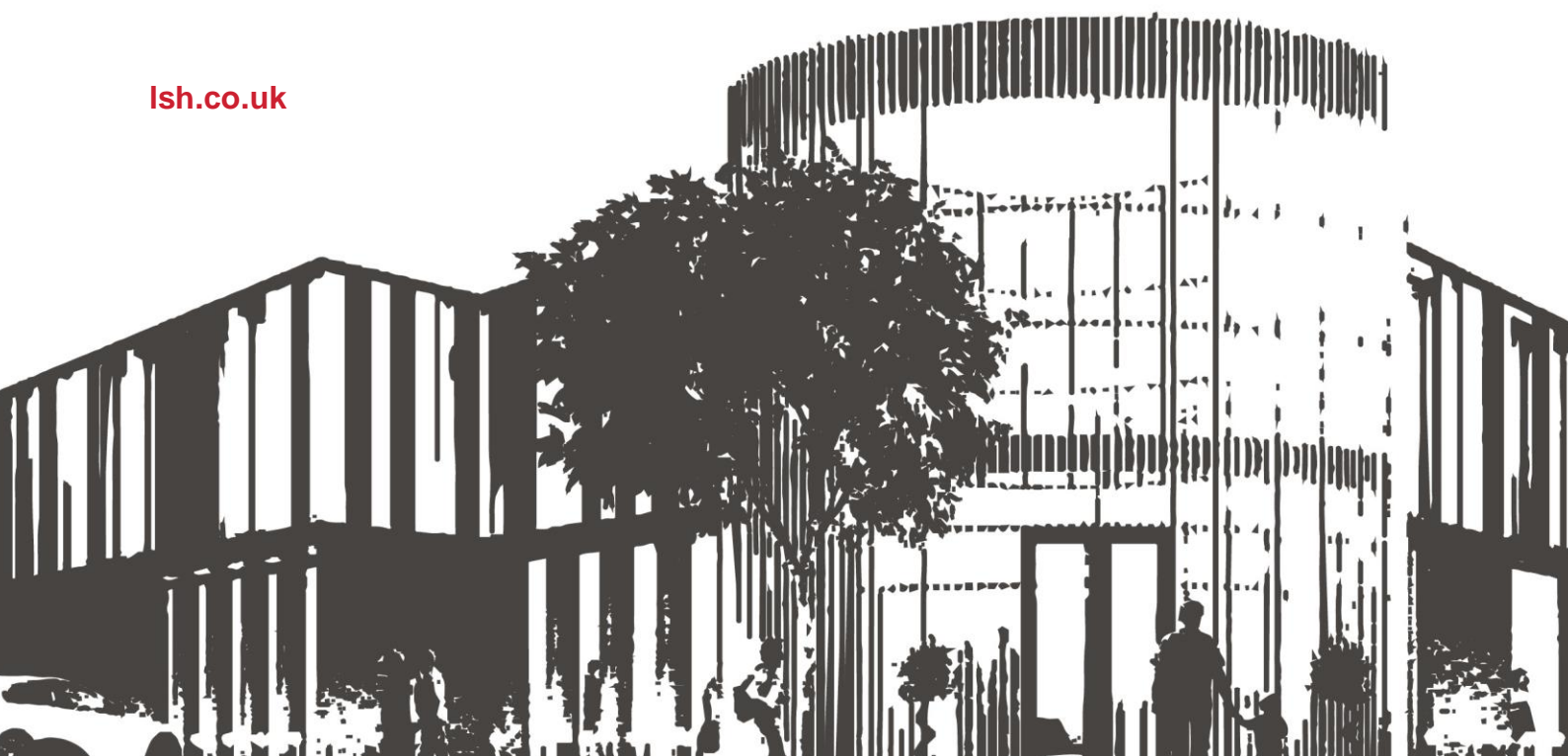
## Volume C: Centre Health Checks. Draft Report

Prepared for:

Reading Borough Council

January 2025

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Issued: January 2025

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# 1. Introduction

1. This appendix provides the findings of qualitative and quantitative assessments of the main centres located within Reading: Reading regional centre; Caversham district centre; Cemetery Junction district centre; Emmer Green district centre: Meadway district centre; Oxford Road West district centre; Shinfield Road district centre; Tilehurst Triangle district centre and Whitley district centre.
2. The Health Check provides an overview of the relative health of the main centres by examining the centres' current vitality and viability based on the key performance indicators (KPIs) set out in the Planning Practice Guidance (PPG):
  - Diversity of uses
  - Proportion of vacant street level property
  - Commercial rents yields on non-domestic property
  - Customers' experience and behaviour
  - Retailer representation and intentions to change representation
  - Pedestrian flows
  - Accessibility
  - Perception of safety and occurrence of crime
  - Balance between independent and multiple stores
  - Barriers to new businesses opening and existing businesses expanding
  - Extent to which there is an evening and night-time economy offer
3. The **Diversity of Uses** is informed by survey data provided by Experian Goad and examines the current number of outlets and quantum of floorspace for each commercial category. These are Convenience and Comparison Retail, Leisure Services (including food and drink outlets, games of chance venues (e.g., casinos, bingo halls, gambling arcades, and betting shops), sports and leisure facilities, night clubs, cinemas, theatres, concert halls and hotel/guesthouse accommodation), Retail Services (including health and beauty services (beauty salons, tattoo parlours etc.), post offices, dry cleaners & laundrettes, travel agents, photo processing outlets & studios, and other personal services) and Financial & Business Services. Vacancies are also discussed separately.
4. **Pedestrian Flows** uses Footfall data from MSCI Property Intel who harvest data from over 10 million mobile devices. All data is fully anonymised and GDPR compliant. Data is collected daily and MSCI Property Intel can identify footfall levels at different times of the day. The heat map included in the report also indicates concentrations of footfall, green indicating lower levels and orange/ red higher concentrations.
5. **Retailer representation** is informed by the site visit as well as the retailer requirements which are obtained from the **Requirement List** where commercial property requirements can be viewed.
6. **Commercial property indicators** are informed using a variety of sources, including PROMIS, Co-Star, and speaking to agents to gather on-the-ground information on current market trends for rents and yields.

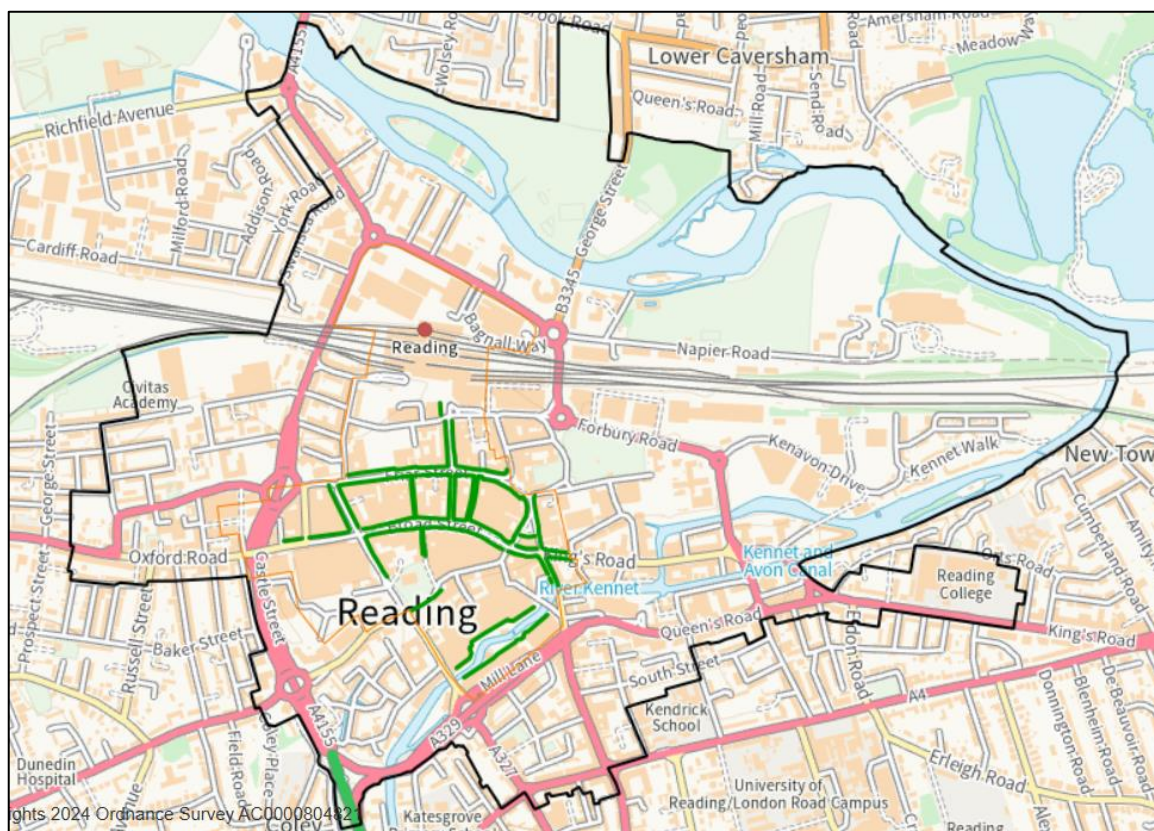
7. For **Crime and Safety**, a postcode within each town centre is chosen as a central point with a ¼ mile radius created to gather crime data within that area for a range of crimes. The crime data, obtained from UK Crime Stats, can be compared across recent years to show any trends. A heatmap can also be generated to highlight where the occurrence of crimes in an area are concentrated.
8. The **Customer Perception** of the centres was obtained from household telephone interview surveys (THIS). The interview asked questions to gauge the respondent's perception of the centres with regards to what they like about them, what they think could be improved and what would encourage them to visit more in the evening.
9. The KPIs help to identify the critical Strengths and Weaknesses of each centre; the Opportunities for future sustainable development and any current and potential Threats to their overall vitality and vitality, summarised in the main report.
10. Where several of the district centres are limited in their size and scale, there is limited data and insight available, meaning that for some, it is not possible to cover all indicators, such as the commercial property indicators and retailer requirements.
11. The findings of the health check assessments are set out in the following proformas.

## 2. Reading Regional Centre Health Check

### Overview

12. As outlined within the Reading Borough Council Local Plan (adopted November 2019), Reading Central Area is designated as a regional centre. As such, it serves as the commercial heart of the Borough, combining leisure, retail and cultural attractions.
13. The main shopping thoroughfare in Reading is the pedestrianised Broad Street, where retailers including John Lewis, Primark and Marks & Spencer are located.
14. The Oracle shopping centre is a hub of retail and food & beverage provision in the area, despite the recent closures of the House of Fraser and Debenhams stores. Remaining brands include Next, H&M and Zara.
15. A second shopping centre, Broad Street Mall, is located at the west end of Broad Street, accessible via St Mary's Butts and Oxford Road. Key tenants include TK Maxx, Iceland, Superdrug and Poundland.
16. The figure below shows the defined boundary for Central Reading (outlined in black) along with the Primary Shopping Area (outlined in orange) and the designated primary frontages (marked in green).

**Figure 1: Reading Central Area Regional Centre**



Source: Reading Borough Council Local Plan Proposals Map

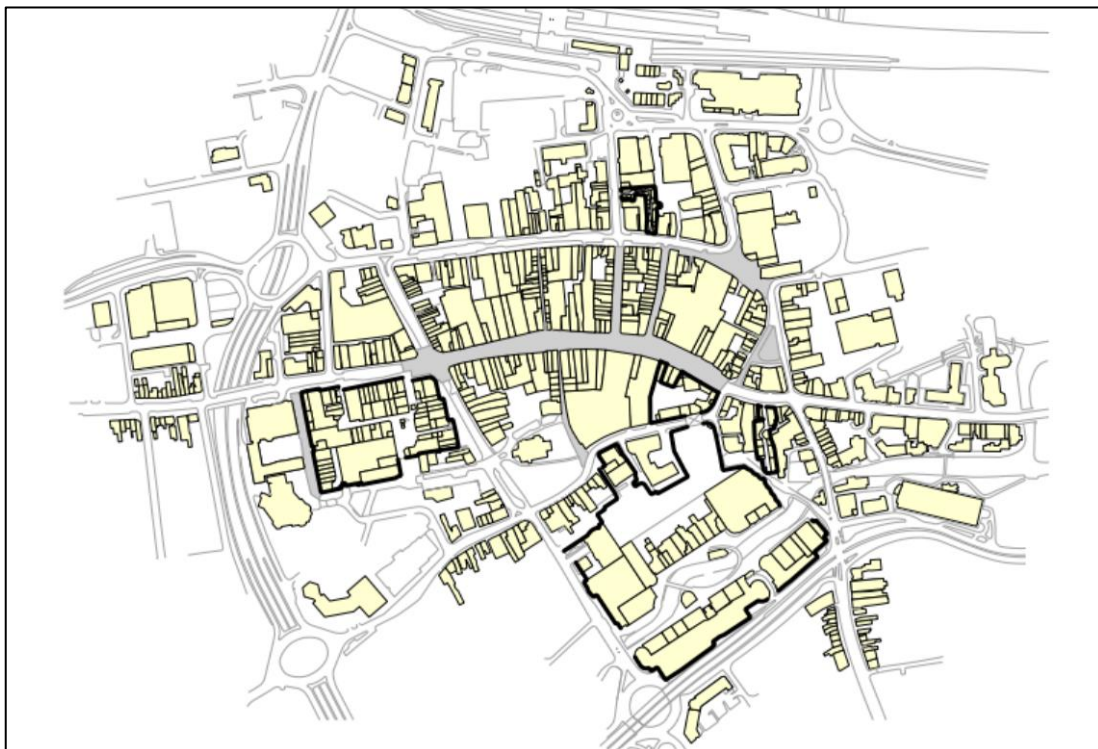


17. The PSA covers a very broad area particularly given that the designated primary frontages are largely focused along Friar Street and Broad Street, with offshoots stemming from both areas. The NPPF defines the PSA as primarily supporting retail uses. Therefore, there is potential to revise the town centre's boundary to exclude non-retail areas such as the station area. Conversely, including key sites where retail has declined can help to prioritise new investment in town centre uses within the PSA by of the sequential approach. Any potential review of the PSA would need to take account of existing Article 4 Directions which protect commercial uses from residential conversions under permitted development rights.

### Diversity of Uses

18. Goad data from May 2024 has been used to assess Reading's mix of uses. The figure below shows the area covered by Goad.

**Figure 2: Reading Goad Coverage Map**



Source: Goad

19. The table below shows that Reading has a total of 705 units and an overall quantum of 199,650 sqm in floorspace.

**Figure 3: Reading Diversity of Uses, Outlets and Floorspace**

	No. of Outlets	% of Total Outlets		Gross Floorspace (sqm)	% of Total Floorspace	
		Reading	UK Average		Reading	UK Average
Comparison Retail	175	24.8%	26.3%	62,895	31.5%	29.2%
Convenience Retail	59	8.4%	9.3%	9,560	4.8%	15.6%
Retail Services	76	10.8%	16.0%	7,804	3.9%	7.4%
Leisure Services	213	30.2%	25.8%	54,869	27.5%	26.7%
Financial & Business Services	51	7.2%	8.3%	10,387	5.2%	6.2%
Vacant	131	18.6%	14.1%	54,135	27.1%	14.3%
<b>Total</b>	<b>705</b>	<b>100.0%</b>	<b>100.0%</b>	<b>199,650</b>	<b>100.0%</b>	<b>100.0%</b>

Source: Goad

20. The centre is dominated by comparison retail and leisure services, both in terms of outlets and floorspace.
21. When comparing to the previous study (Western Berkshire Retail & Commercial Leisure Assessment 2016), the total number of outlets has fallen by 17, whilst the total floorspace has declined by 10,550 sqm. The number of comparison retail outlets has dropped from 229 to 175.
22. This decline in overall retail and leisure provision (and comparison retail provision in particular) reflects a national trend in recent years, which comes as a result of factors including the growth in online shopping/ retailers (particularly comparison-led retailers such as Amazon and ASOS) and the changes to the Use Classes Order and Permitted Development Rights which allow for greater flexibility in the conversion of buildings.

**Figure 4: Reading Food & Beverage Outlets and Floorspace**

	No. of Outlets	% of Total Outlets		Gross Floorspace (sqm)	% of Total Floorspace	
		Reading	UK Average		Reading	UK Average
Bars & Wine Bars	27	3.8%	2.3%	9,513	4.8%	2.4%
Cafes	37	5.2%	5.2%	4,218	2.1%	2.9%
Fast Food & Take-Away	43	6.1%	6.1%	5,983	3.0%	3.1%
Public Houses	18	2.6%	2.6%	5,992	3.0%	3.4%
Restaurants	53	7.5%	5.1%	11,510	5.8%	4.3%
<b>Total</b>	<b>178</b>	<b>25.2%</b>	<b>21.3%</b>	<b>37,216</b>	<b>18.6%</b>	<b>16.1%</b>

Source: Goad

23. The range of food & beverage outlets is broadly in line with the UK average, with a slightly higher proportional provision of bars & wine bars and restaurants.

## Vacancies

24. There are a total of 131 vacant outlets in Reading which represents 18.6% of the total outlets (higher than the UK average of 14.1%). 27.1% of the floorspace in Reading is vacant.
25. The figure below illustrates where vacant units are located in Reading as of May 2024. As can be seen, some of the larger vacant outlets include the former Primark store on West Street and the former House of Fraser store (2,940 sqm) and Next store (3,730 sqm) within The Oracle shopping centre.
26. The Oracle Centre is subject to a high number of voids. Along with the two aforementioned stores above, the latest Experian Goad survey recorded 28 vacant



units in total (out of approximately 100 units). However, the high number of voids will relate to plans to refurbish and part redevelop the centre. Plans by Hammerson, the centre owners, include the sub-division of the former House of Fraser and Next Home & Beauty units and redeveloping part of the site (including the Vue cinema unit) for a housing led mixed use scheme.

**Figure 5: Reading Vacancies Map**



Source: Goad

## Multiple and Independent Representation

27. There are a total of 243 national multiples in Reading as identified by Goad which represents 42% of all occupied units. National multiples are defined as being part of a network of nine or more outlets.

**Figure 6: Reading Multiple Count by Use**

Counts	Outlets
Comparison	106
Convenience	22
Retail Service	16
Leisure Services	75
Financial & Business Services	24
<b>Total Multiple Outlets</b>	<b>243</b>

Source: Goad

28. National multiples allow a centre to draw shoppers from beyond its immediate catchment as people search for their nearest store and are willing to travel further for brands such as John Lewis and Marks & Spencer.
29. Major comparison retailers present in the centre include John Lewis, Marks & Spencer, Primark and Next.
30. The convenience retail offer is led by Sainsbury's, Iceland and M&S Foodhall along with smaller format units including two Tesco Express stores.
31. The leisure services offer includes popular restaurant chains such as Five Guys, Nando's and Pizza Express as well as the Vue Cinema south of the River Kennet.
32. The financial & business services offer includes several national multiple high street banks, including Barclays, Halifax and HSBC.
33. Independent retailers are essential to create a unique and local feel to a centre. They help to curate a sense of place and pride within an area for those who live nearby. Reading has a range of independent outlets, including Zerodegrees (microbrewery), But is it Art? (card & gift shop) and Hickies (music store).

## Markets

34. Hosier Street Market operates every Wednesday through to Saturday, from 9am to 4pm. Local traders offer a mix of fruit & veg, flowers, clothing, household goods and more across various stalls.
35. Blue Collar operate a street food market at Market Place Square every Wednesday and Friday over lunchtime. A range of cuisines are on offer between 11:30am and 2:30pm.

## Retailer Requirements

36. Demand from retailers and leisure operators for representation in a centre is an important indicator of a centre's overall health and viability. The latest published market demand report is set out below.

**Figure 7: Retailer Requirements, Reading**

Recorded Date	Operator	Sector	Min Sqm	Max Sqm
Oct 24	Ninja Warrior UK	Leisure Service	1,850	3,700
Oct 24	Swim!	Leisure Service	420	560
Oct 24	Footy Nation	Leisure Service	740	1,100
Oct 24	Heavenly Desserts	Leisure Service	180	210
Sep 24	M&S Food	Convenience Retail	560	2,300
Sep 24	House of Tweed	Comparison Retail	90	370
Sep 24	Katie O'Brien's Irish Tavern	Leisure Service	190	740

Recorded Date	Operator	Sector	Min Sqm	Max Sqm
Sep 24	Slim Chickens	Leisure Service	280	330
Sep 24	Majestic Wine	Convenience Retail	230	460
Sep 24	Cards Direct	Comparison Retail	110	190
Sep 24	Consol Tanning	Retail Service	120	330
Sep 24	Candy Galore	Convenience Retail	140	280
Sep 24	Character.com	Comparison Retail	230	370
Sep 24	Aqua Clothing	Comparison Retail	120	460
Sep 24	House of Cavani	Comparison Retail	460	740
Sep 24	Shake Down	Leisure Service	70	140
Aug 24	Padel Hub	Leisure Service	1,400	2,800
Aug 24	Hops and Spice	Leisure Service	90	190
July 24	KFC	Leisure Service	110	230
July 24	Age UK	Comparison Retail	130	460
June 24	Dirty Martini	Leisure Service	230	740
June 24	Travelodge	Leisure Service	930	3,700
May 24	Knead	Convenience Retail/ Leisure Service	45	280
May 24	Loaf	Comparison Retail	460	930
May 24	Machine Mart	Comparison Retail	140	740
May 24	Evans Cycles	Comparison Retail	370	740
May 24	NRG Gyms	Leisure Service	1,850	3,700
Apr 24	Taco Bell	Leisure Service	170	230
Apr 24	Moxy Hotels	Leisure Service	4,600	9,300
Apr 24	Ariat	Comparison Retail	140	280
Apr 24	Graystone	Leisure Service	2,800	2,800
Apr 24	Everyman Cinema	Leisure Service	740	1,400
Apr 24	The Climbing Hangar	Leisure Service	1,000	2,300
Apr 24	Spider Entertainment	Leisure Service	740	740
Apr 24	Lidl	Convenience Retail	1,700	2,200
Mar 24	Mary Brown's	Leisure Service	140	200
Mar 24	David Lloyd Leisure	Leisure Service	370	560
Mar 24	Wilko	Comparison Retail	1,700	3,300
Mar 24	The Range	Comparison Retail	1,850	7,400

Recorded Date	Operator	Sector	Min Sqm	Max Sqm
Mar 23	Barrio	Leisure Service	280	650
Mar 24	McMullen & Sons Brewing and Pubs	Leisure Service	230	460
Mar 24	Adventure Bar Group	Leisure Service	230	1,400
Mar 24	Itsu	Leisure Service	140	370
Mar 24	WEX	Comparison Retail	190	370
Mar 24	Magic Wrap	Leisure Service	45	45
Mar 24	Pasta Evangelists	Leisure Service	90	140
Feb 24	Bodycare	Comparison Retail	280	460
Feb 24	Six by Nico	Leisure Service	170	330
Feb 24	Blue Whale Supermarket	Convenience Retail	740	930
Jan 24	Ready Burger	Leisure Service	230	280
Jan 24	The Cocktail Club	Leisure Service	140	460
Nov 23	BIM's	Leisure Service	230	230
		<b>Total</b>	<b>30,490</b>	<b>63,625</b>

Source: The Requirement List

37. As of October 2024, a review of published operator requirements identified 52 recorded requirements from retail and leisure operators since October 2023, seeking a combined maximum floorspace of up to 63,625 sqm.
38. It should be noted that these are not necessarily operators seeking representation within the centre itself but potentially out-of-centre locations and retail parks, particularly leisure operators seeking large sites with dedicated car parking (e.g. Ninja Arena).
39. It is also possible that these operators are not looking for opportunities in Reading specifically, rather they are looking for opportunities in areas similar to and including Reading. However, it is still an indicator of potential investor interest that could be realised if suitable sites come forward either speculatively, as part of a future development scheme, or through specific investment interventions.
40. Independent/ smaller operators do not tend to document their desire for retail space in the same way as the larger national multiples and fast-growing organisations, and so gauging the demand for retail space from these businesses is harder.

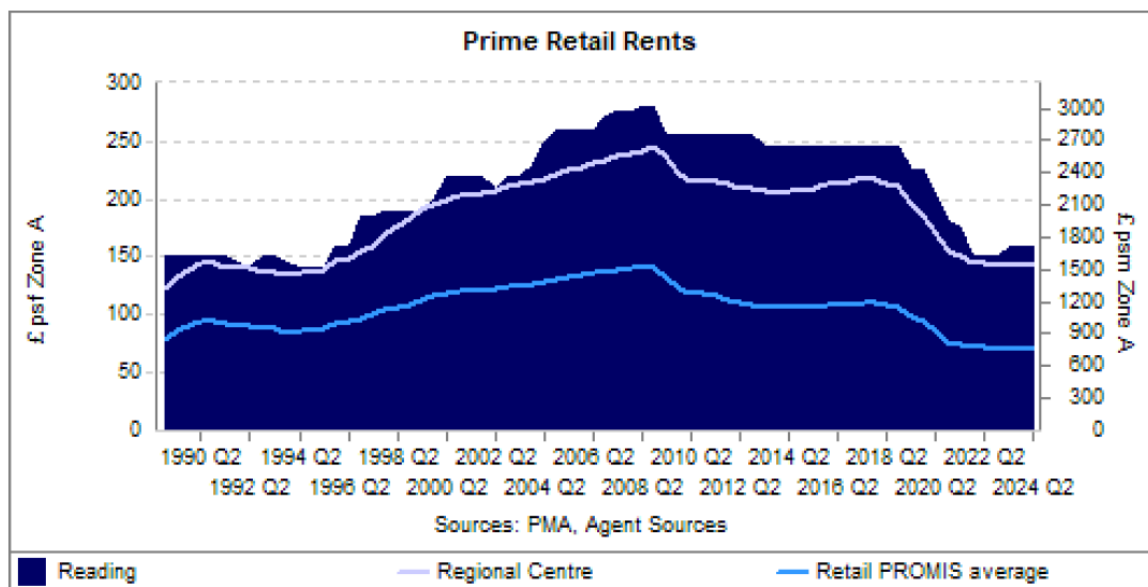
## Commercial Rents and Yields

41. Over recent years the UK Retail sector has experienced a significant number of corporate failures, which has often resulted in Creditor Voluntary Arrangements (CVAs) or Pre pack Administrations. Retailers and restaurateurs have frequently

used these processes to effectively impose lower rentals, turnover rents and flexible leases onto landlords. The upshot of this is rental levels can vary widely, even for identical shops adjacent to each other.

42. In light of the above and current vacancy rates, solvent retailers have adopted aggressive positions at lease renewal seeking to drive rents down and reduce lease commitments, regardless of comparable evidence.
43. The impact of the pandemic has exaggerated this trend and flexible leases and turnover linked rents are becoming more common place. In many cases landlords have adopted the policy that keeping a shop occupied, and thereby mitigating void costs is preferable to maintaining a rental tone within a retail location.
44. Information from PMA PROMIS estimates prime rents in Reading to be around £1,720 psm (£160 psf) Zone A as of mid-2024, which implies a decline in prime rents since the end of 2017 of -34.7%, compared with the PROMIS average rate of decline of -35.6%.

**Figure 8: Prime Retail Rents, Reading**



Source: PMA PROMIS Retail Report

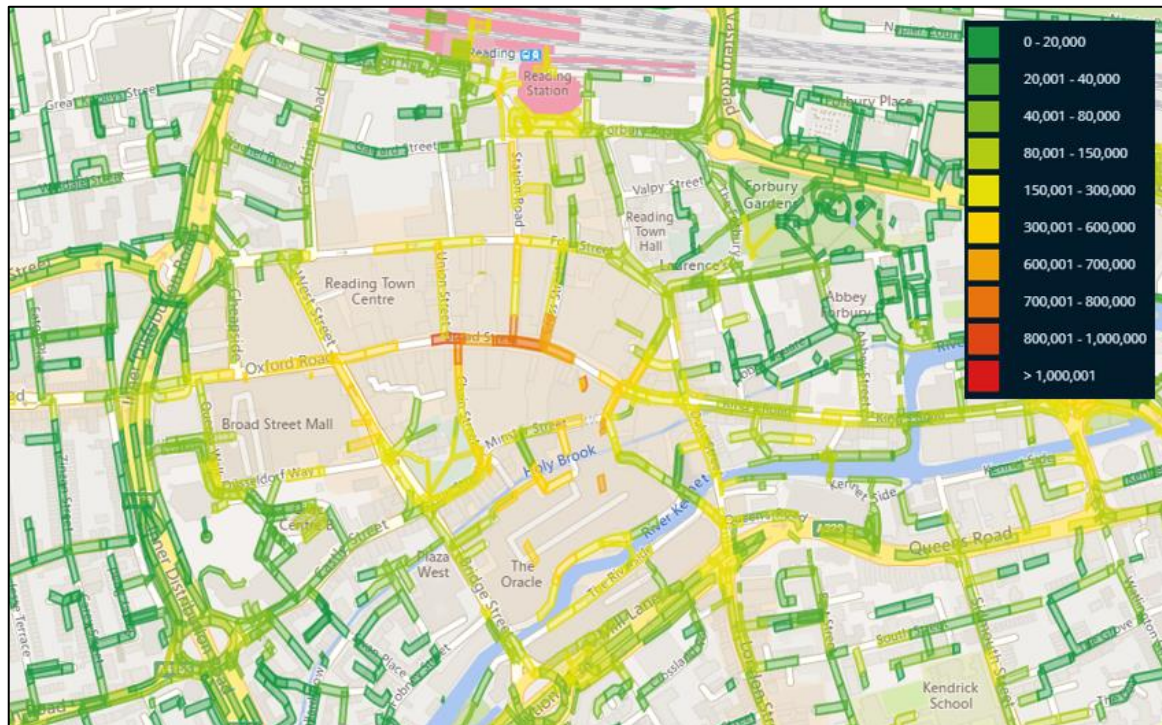
45. In terms of investment yields, retail as an asset class has seen a significant fall in value over the past decade. Transactional volumes in 2023 were subdued with high interest rates and global political uncertainties impacting on investor sentiment. Clearly, there are many factors that impact on town centre retail yields including lease length, tenant covenant and basis of rent review but in the broadest terms we would comment as follows:
  - Prime high street yields – 6.75%
  - Good secondary high street yields – 9%
  - Secondary high street yields – 12%



## Pedestrian Flows

46. The figure below illustrates the pedestrian flows for Reading in the form of a heat map showing total pedestrian movements for September 2024. It shows a particular concentration of footfall along Broad Street.

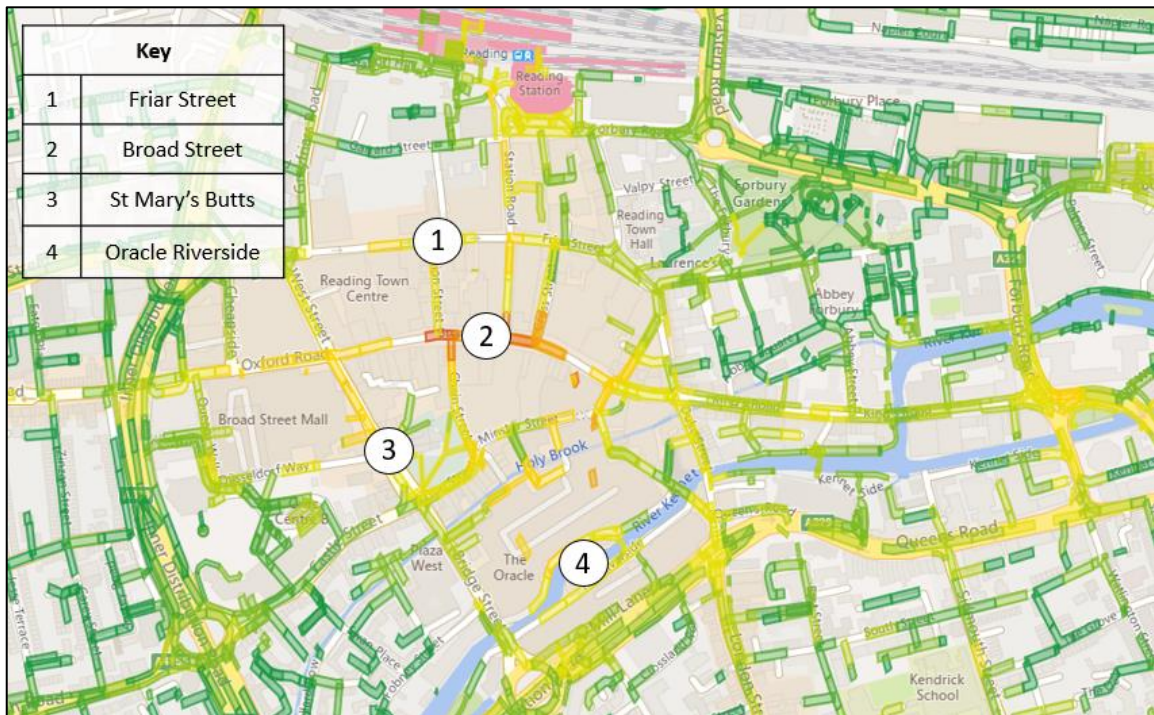
**Figure 9: Reading Footfall Heat Map, September 2024**



Source: MSCI

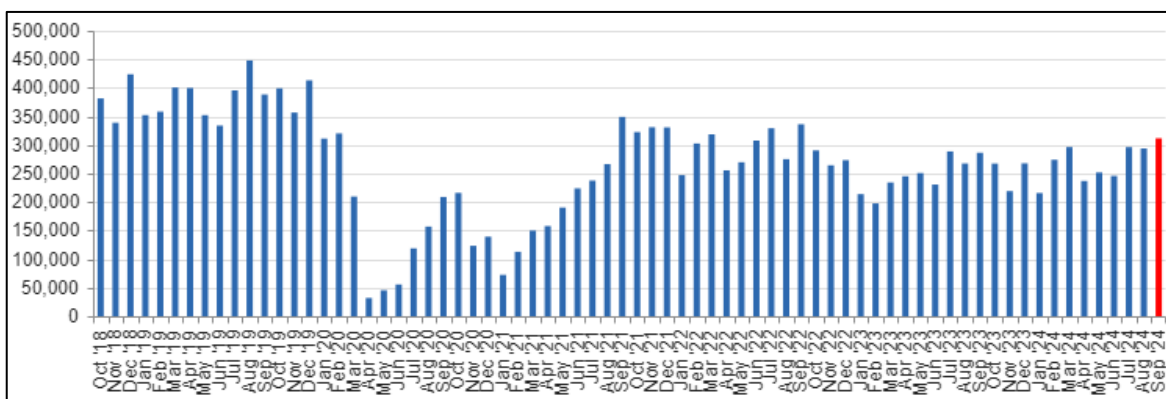
47. Four locations within the centre have been sampled to assess footfall trends over recent years: Friar Street, Broad Street, St Mary's Butts and Oracle Riverside. These locations can be seen mapped in the figure below.

**Figure 10: Reading Footfall Sample Locations**



48. The figure below shows how footfall levels have changed between October 2018 and September 2024 along Friar Street.
49. As can be seen, footfall levels have bounced back following the pandemic period but have not quite reached pre-pandemic levels.

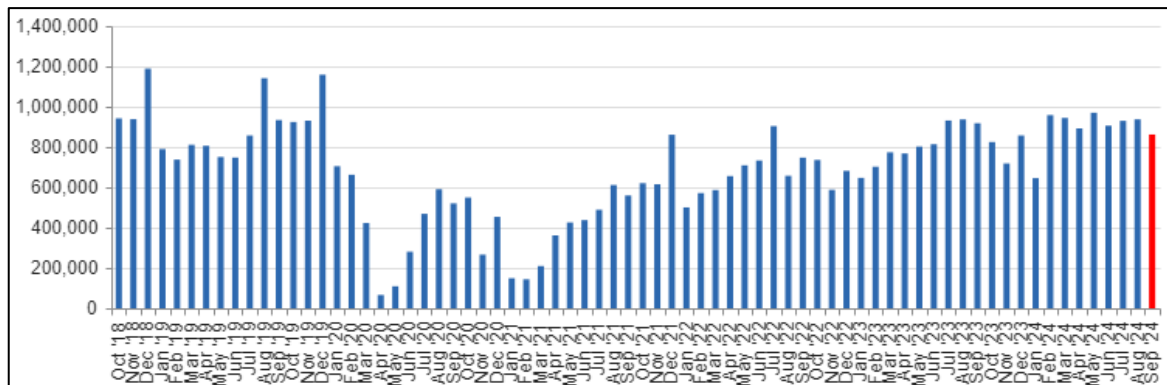
**Figure 11: Monthly Footfall Graph, October 2018 - September 2024, Friar Street**



Source: MSCI

50. The figure below shows how footfall levels have changed between October 2018 and September 2024 along Broad Street.
51. As can be seen, figures from July 2023 onwards show a strong recovery from the pandemic period, with monthly figures regularly surpassing 800,000. Despite this, the three busiest months for pedestrian activity during this period came across 2018 (December) and 2019 (August and December).

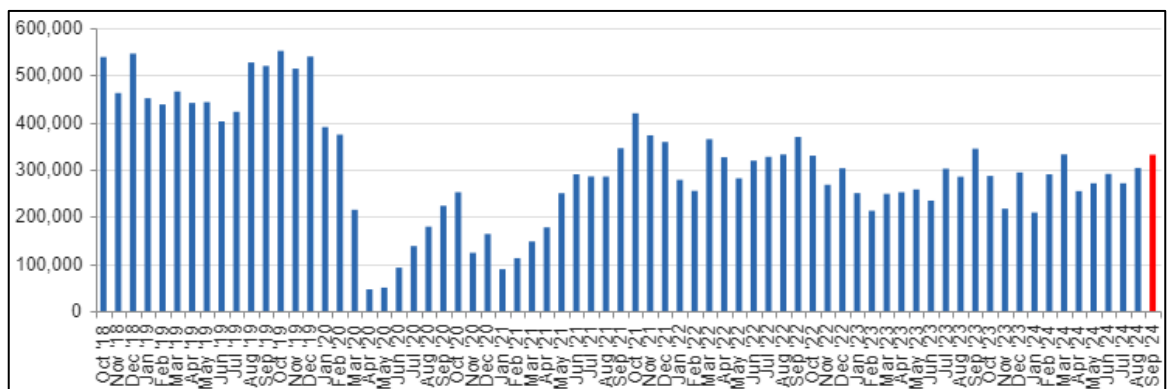
**Figure 12: Monthly Footfall Graph, October 2018 - September 2024, Broad Street**



Source: MSCI

52. The figure below shows how footfall levels have changed between October 2018 and September 2024 along St Mary's Butts.
53. As can be seen, footfall levels have dropped notably in recent years, with pre-pandemic figures consistently above 400,000 and occasionally surpassing 500,000 but post-pandemic figures often below 300,000.

**Figure 13: Monthly Footfall Graph, October 2018 - September 2024, St Mary's Butts**

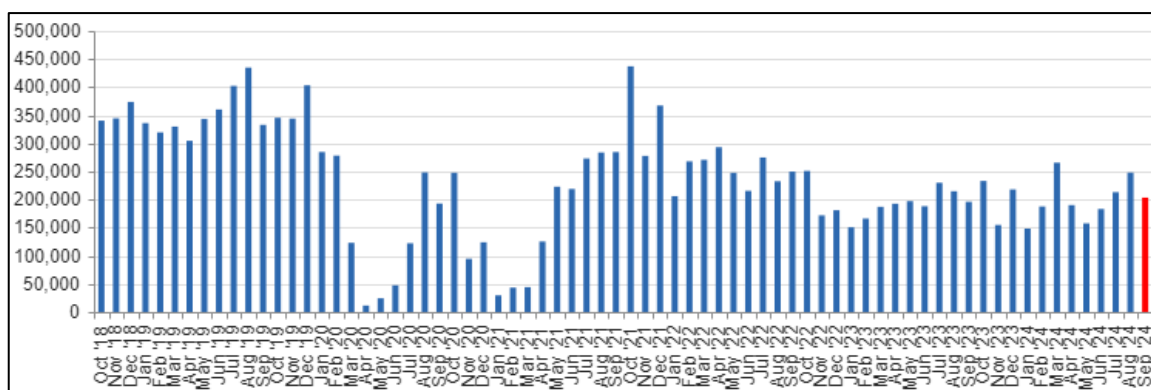


Source: MSCI

54. The figure below shows how footfall levels have changed between October 2018 and September 2024 along Oracle Riverside.
55. As can be seen, footfall levels have notably dropped at Oracle Riverside, where monthly figures in 2018 and 2019 (pre-pandemic) were consistently above 300,000 and 2023 and 2024 (post-pandemic) figures have only surpassed 250,000 on one occasion.



**Figure 14: Monthly Footfall Graph, October 2018 - September 2024, Oracle Riverside**



Source: MSCI

## Accessibility

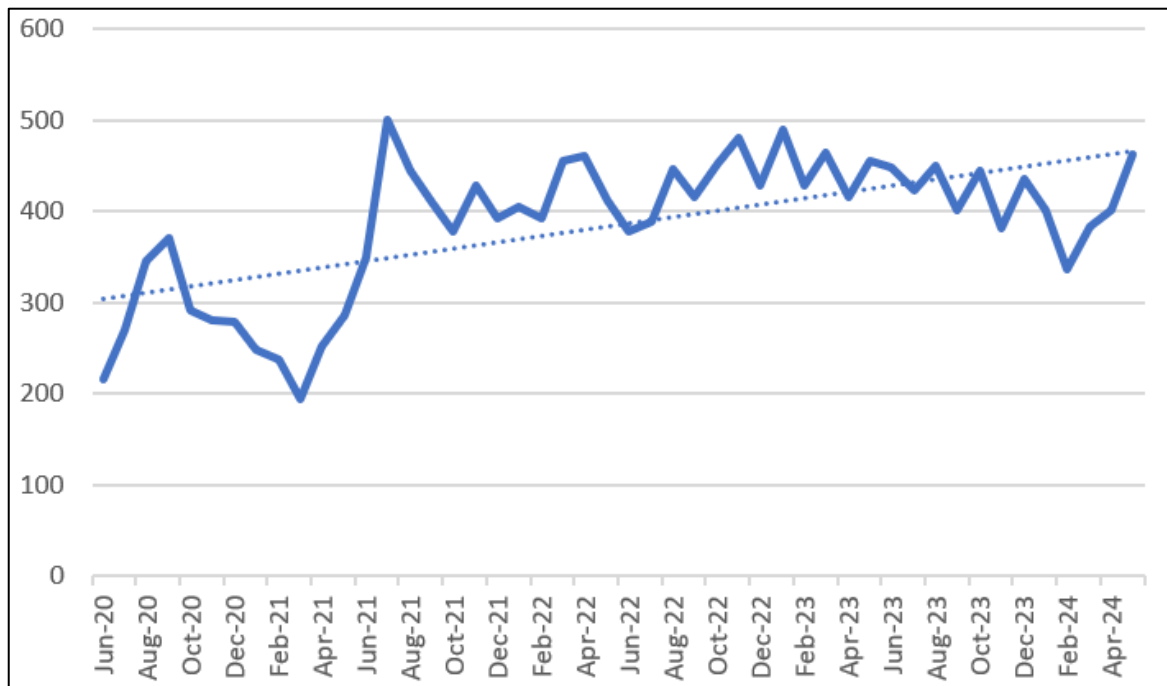
56. Reading train station is a major transport hub, providing regular eastbound connections into London, and westbound connections to places including Bristol, Cardiff and Exeter. Local connections can also be made to Newbury, Basingstoke and Guildford. Elizabeth Line services began operating from Reading train station in 2022, with frequent services into Central London (including Paddington, Bond Street and Canary Wharf) and beyond.
57. Bus services can be picked up across the centre, with a major hub located at the southern exit of the train station. Services provide regular connections to key local and regional locations, including Caversham, Tilehurst, Select Car Leading Stadium (Reading Football Club), University of Reading campuses, Henley-on-Thames, and Twyford.
58. Car parking can be found across the centre, with the main provision being:
  - The Oracle – Riverside – 1,611 spaces
  - Reading Station – 1,600 spaces
  - Broad Street Mall – 750 spaces
  - Queens Road – 700 spaces
  - The Oracle – Holy Brook – 595 spaces
59. Various key areas of the centre are pedestrianised, creating safe and enjoyable spaces to navigate Reading on foot. Cycle parking can be found across the centre, allowing for safe storage of bikes whilst visiting Reading or making onward connections.

## Crime and Safety

60. A central postcode within Reading was used to review total crime data within a ½ mile radius between June 2020 and May 2024. The figure below outlines the total crime rate month by month within this period, as well as a trendline to show the overall change in criminal activity over the four years.

61. As can be seen, recorded crime levels increased as we moved out of the pandemic period, and look to have somewhat stabilised since.

**Figure 15: Reading Recorded Crimes, June 2020 - May 2024**

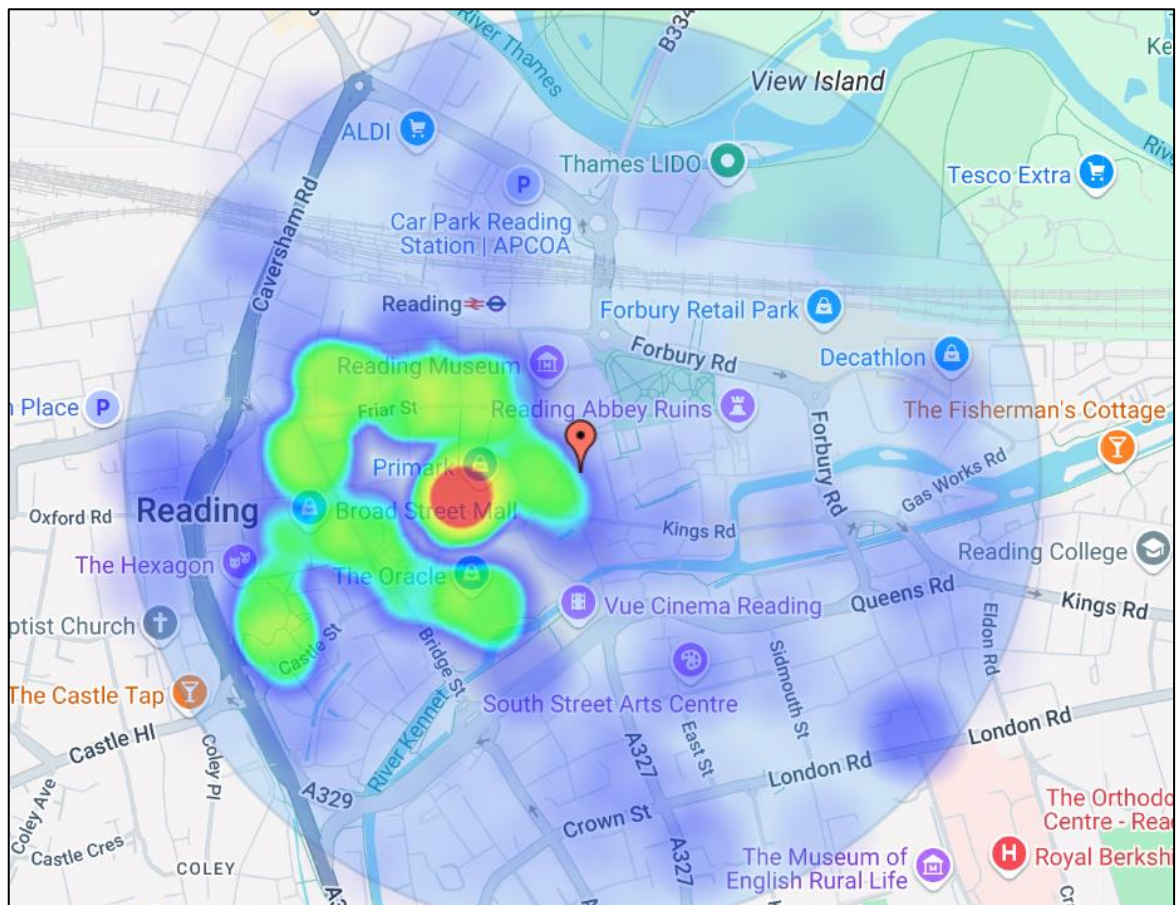


Source: UKCrimeStats

62. The figure below shows a heat map representing criminal activity within the same area and for the same period outlined previously. As can be seen, criminal activity is predominately concentrated within the core retail and shopping area, with a specific hot spot along Broad Street, in the vicinity of the John Lewis store.
63. The top three types of crimes recorded within this area during this period are violence and sexual offences (5,772 recorded incidences), shoplifting (2,223 recorded incidences) and public order offences (2,174 recorded incidences).



**Figure 16: Reading Crime Heat Map, June 2020 - May 2024**



Source: UKCrimeStats

## Barriers to Business

64. External influences can cause significant problems for businesses such as the current political, economic and environmental conditions which are often outside of our control. Understanding the potential issues and being aware of the barriers to business is important to consider to enable businesses to combat and address them, as these can also result in opportunities. The major challenges include:
- Cost of Living/ Inflation – consumers are tightening their budgets as a result of inflationary pressures on things such as grocery shopping and energy bills.
  - Brexit – adding complexities and costs to the price of goods.
  - Global Climate Emergency – the need to operate and live in a more sustainable and environmentally friendly way, which can sometimes be more costly/ less efficient and the overall impact of climate change (e.g., weather changes and flooding).
  - Digital Connectivity – the provision of low-cost, high-speed broadband to businesses and the ability to aid business start-ups with access to full fibre broadband. The provision of public Wi-Fi to promote interconnectivity between borough residents and businesses. Using smart technology to augment physical

spaces to location specific digital services (such as wayfinding) to create a meaningful destination for the borough's residents and businesses.

- Online Shopping – the convenience and product range offered by online retailers such as Amazon and Temu is leading to a growth in consumers shopping online.

65. The main challenges businesses currently face include impacts on supply chains, rising cost of supplies, rising operational costs (e.g. energy prices), labour shortages, and the squeeze on household income from the cost of living crisis which combined are impacting on business viability and growth potential.

## Evening and Night Time Economy

66. A strong evening and night time economy can often be a good indicator of a strong, vital and viable centre. A vibrant evening and night time economy is largely underpinned by a quality leisure offer within a centre, and so a sample of predominantly leisure outlets within Reading have been selected with their opening times and more importantly closing times recorded to get a sense of the provision of the evening offer.
67. As outlined below, there is a variety of arts, entertainment and food & beverage venues and establishments within the centre.
68. Hexagon Theatre sits to the west of the centre and has hosted a variety of popular comedy shows, music concerts, pantomimes and more.
69. Oracle Riverside provides a food & beverage hot spot by the river, with two pedestrian footpaths either side of the Kennet connected by a footbridge. Restaurants and bars (including Nando's, Pizza Express and All Bar One) line the water front, with the 11-screen Vue Cinema complementing this offer.

**Figure 17: Leisure Operator Sample**

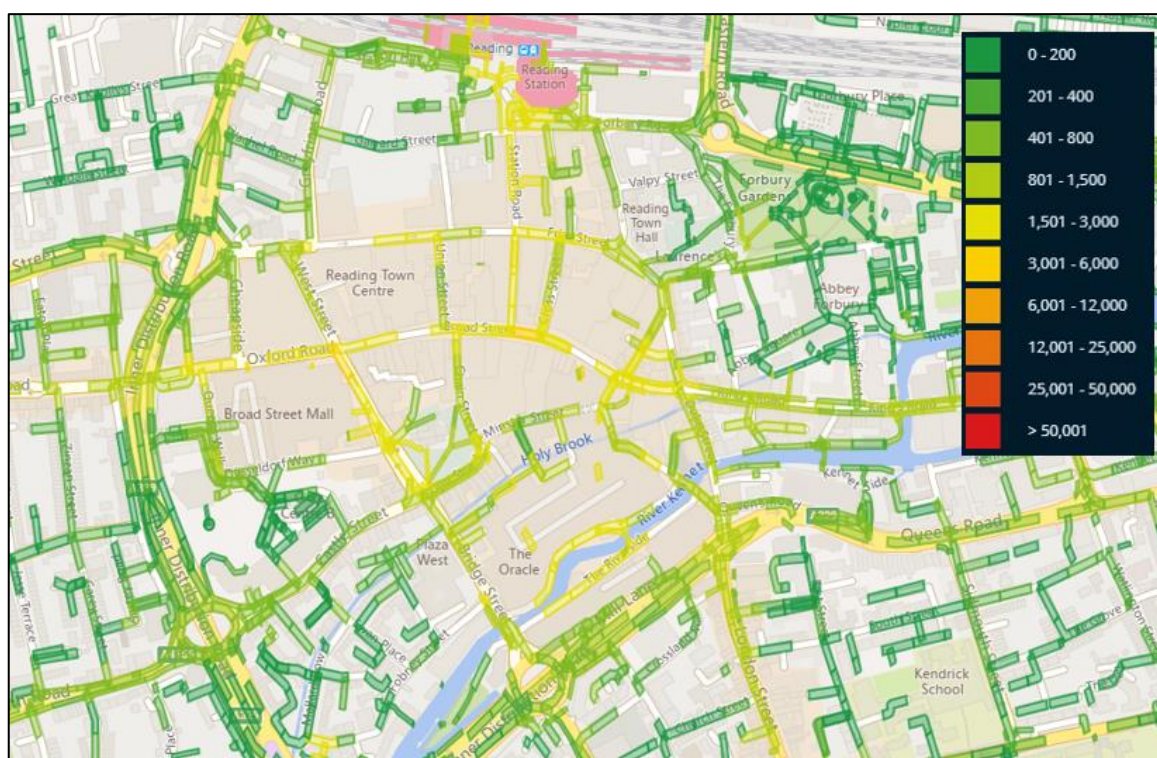
Retailer Name	Type	Open	Close
Vue Cinema	Cinema	Morning	Late
Reading Biscuit Factory	Cinema	Morning	Late
Hexagon Theatre	Theatre	Morning	Late
Sub89	Live Music Venue	6-7pm	11pm-4am
Nando's	Restaurant	11am	10pm
Pizza Express	Restaurant	11:30am	10:30pm
Carluccio's	Restaurant	9am	8-10pm
Thai Corner	Restaurant	12pm	10-10:30pm
All Bar One	Bar	9-10am	10pm-1pm
The Botanist	Bar	10-11am	11pm-12am

Retailer Name	Type	Open	Close
Slug & Lettuce	Bar	10am-12pm	11pm-1am
The Hope Tap (Wetherspoon)	Pub	8am	12-1am
The Boundary	Pub	12pm	11pm-1am

Source: LSH Research

70. The figure below shows the footfall heatmap for Reading during the evening (5pm – 11pm). Footfall levels are highest along Broad Street, whilst there is also reasonable activity in areas including Oxford Road, St Mary's Butts and Oracle Riverside.

**Figure 18: Reading Evening (5pm - 11pm) Footfall Heat Map**

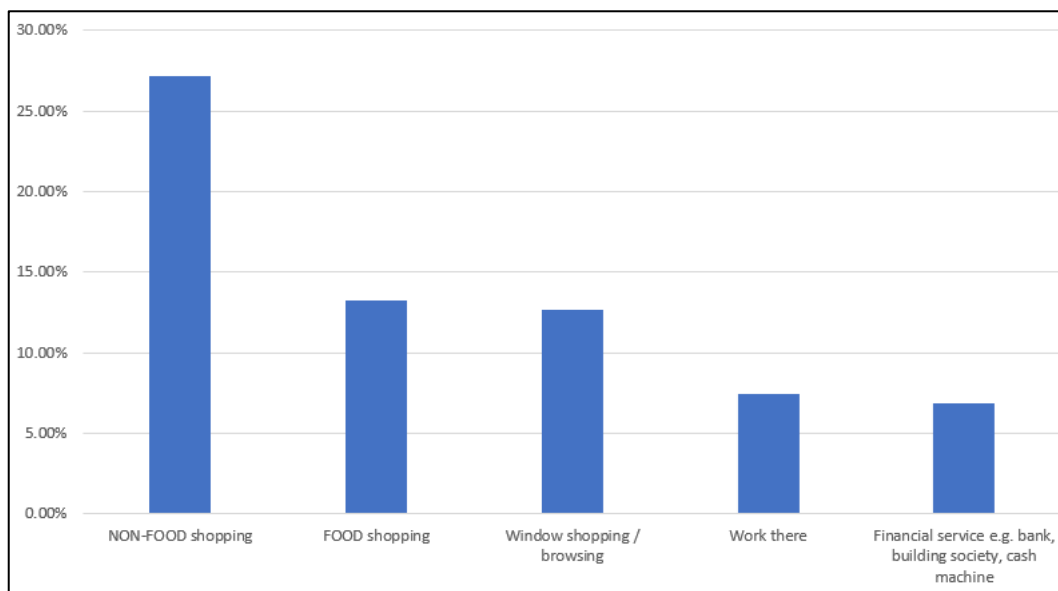


Source: MSCl

## Customer Perception

71. Our assessment of customers' views and behaviours draws on the household survey conducted by NEMS Market Research (NEMS) across the six study zones.
72. Apart from helping to identify shopping and leisure patterns across the defined catchment area and zones, the household survey also asked specific questions on their main reason for visiting Reading centre, what they like about it and what improvements (if any) could be made to make them likelier to visit more frequently.
73. The figure below sets out the main reasons for respondents visiting Reading town centre.

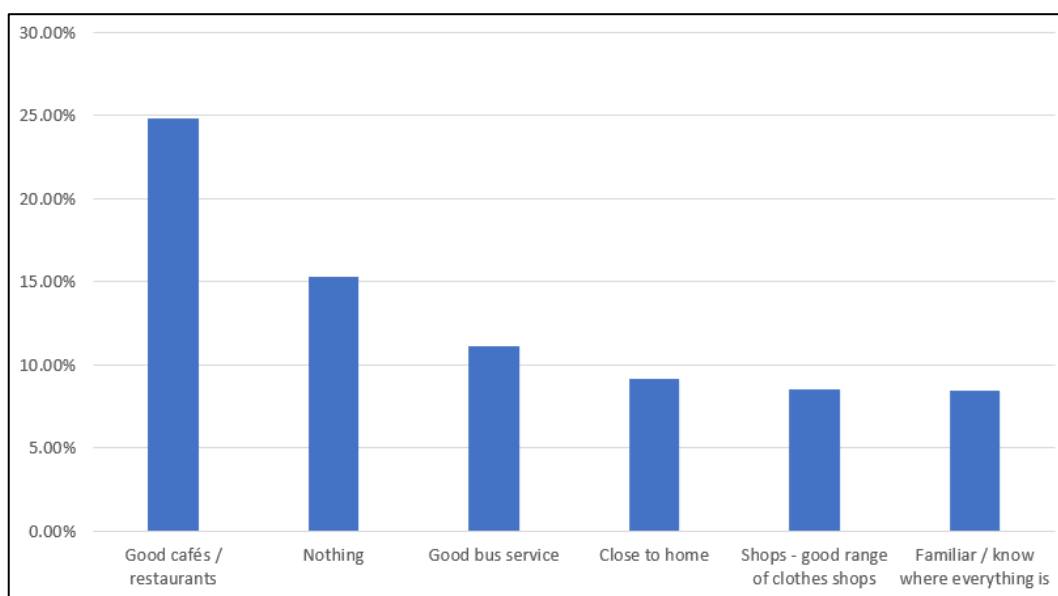
**Figure 19: Reading, Main Reasons for Visiting**



Source: NEMS Household Survey Results

74. The figure below sets out the main things that respondents like about Reading town centre.

**Figure 20: Reading, Main Visitor Likes**

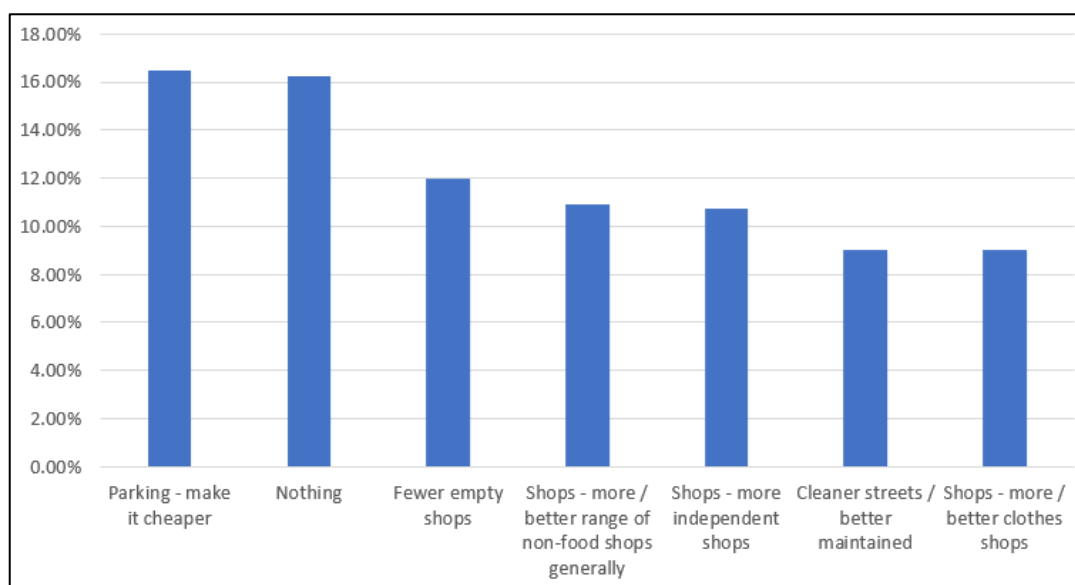


Source: NEMS Household Survey Results

75. The figure below outlines the main areas where respondents believe improvements could be made to Reading town centre, making them likelier to visit more frequently.



**Figure 21: Reading, Main Possible Improvements**



Source: NEMS Household Survey Results

## Conclusion

76. Overall, the Strengths, Weaknesses, Opportunities, Threats (SWOT) can be summarised as follows:

### Strengths

- Strong comparison retail and leisure services provision.
- Strong food & beverage offer (particularly bars & wine bars and restaurants when comparing to the UK average).
- Good presence of national multiples (particularly for comparison retail).
- Vue Cinema and supporting food & beverage operators at The Oracle Centre act as strong leisure and entertainment hub.
- Hosier Street Market and Blue Collar Street Food Market.
- Strong potential demand from retail and leisure operators.
- Strong transport links with great connections to and from London.
- Good parking provision across the centre.
- A variety of arts, entertainment and food & beverage venues and establishments that contribute to a healthy evening economy.
- Strong sentiment from visitors (interviewed within the NEMS household survey) around the provision of cafes and restaurants in the centre.

### Weaknesses

- Low retail services provision.
- High vacancy rates, particularly for floor space.
- Significant decline in prime rents in recent years.
- Footfall levels have failed to recover to pre-pandemic levels in several parts of the centre.



- ‘Nothing’ was the second most common answer to the question of what visitors like about the centre within the NEMS household survey (over 15% of respondents gave this answer).

### Opportunities

- Refurbishment and redevelopment plans for The Oracle Centre will help to reinvigorate investment in this part of the town centre. The repurposing of the two vacant department stores will help rationalise an oversupply of floorspace in the centre and stimulate new expenditure through new housing provision, which will also benefit businesses in the wider town centre.
- New uses brought in to address vacancies (education, residential, healthcare etc.).
- Address the large-scale vacancies (excluding those relating to The Oracle Centre), taking inspiration from the innovative repurposing of commercial premises elsewhere (examples include vacant floorspace at Merseyway Shopping Centre in Stockport being transformed into the Stockroom library, venue and community space, and the vacant former Toys R Us unit in Gloucester being tuned into a padel venue).
- Cheaper parking (as identified within the NEMS household survey).
- Capitalise on strong potential interest from retail and leisure operators for presence within the centre.

### Threats

- The potential loss of further high street brands leading to further vacancies.
- Declining comparison retail offer within the centre.
- High/ increasing business operating costs.
- Potential uncertainty surrounding the relocation and downsizing of the Vue Cinema linked to the partial redevelopment of The Oracle Centre. It is crucial that proposals to relocate the site to another town centre site follow through.
- The growth in online shopping and its impact on brick-and-mortar retail outlets.
- The vacancy level and associated lack of activity negatively impacting on operators’ perceptions and willingness to invest.

### 3. Caversham District Centre Health Check

#### Overview

77. As outlined within the Reading Borough Council Local Plan (adopted November 2019), Caversham is designated as a district centre.
78. The centre sits just north of Reading regional centre, separated by the River Thames, with the A4155 running through its heart.
79. The key frontages (marked in purple in the figure below) are found along Church Road, Church Street and Prospect Street and make up a large proportion of the centre. It is noted that the Local Plan does not define a Primary Shopping Area (PSA) for Caversham or any of the other district centres. The distribution of the primary frontage in Caversham means that the defined centre boundary broadly reflects what a defined PSA for the centre would be.

**Figure 22: Caversham District Centre**



Source: Reading Borough Council Local Plan Proposals Map

#### Diversity of Uses

80. Goad data from May 2024 has been used to assess Caversham's mix of uses. The figure below shows the area covered by Goad.

**Figure 23: Caversham Goad Coverage Map**



Source: Goad

81. The table below shows that Caversham has a total of 120 units and an overall quantum of 19,590 sqm in floorspace.

**Figure 24: Caversham Diversity of Uses, Outlets and Floorspace**

	No. of Outlets	% of Total Outlets		Gross Floorspace (sqm)	% of Total Floorspace	
		Caversham	UK Average		Caversham	UK Average
Comparison Retail	25	20.8%	26.3%	3,300	16.8%	29.2%
Convenience Retail	11	9.2%	9.3%	3,700	18.9%	15.6%
Retail Services	28	23.3%	16.0%	3,290	16.8%	7.4%
Leisure Services	27	22.5%	25.8%	5,490	28.0%	26.7%
Financial & Business Services	13	10.8%	8.3%	1,470	7.5%	6.2%
Vacant	16	13.3%	14.1%	2,340	11.9%	14.3%
<b>Total</b>	<b>120</b>	<b>100.0%</b>	<b>100.0%</b>	<b>19,590</b>	<b>100.0%</b>	<b>100.0%</b>

Source: Goad

82. There is a particularly strong presence of retail services within Caversham when compared to the UK average, both in terms of proportion of outlets and floorspace. Retail services, along with comparison retail and leisure services each make up more than 20% of the total outlet provision.

**Figure 25: Caversham Food & Beverage, Outlets and Floorspace**

	No. of Outlets	% of Total Outlets		Gross Floorspace (sqm)	% of Total Floorspace	
		Caversham	UK Average		Caversham	UK Average
Bars & Wine Bars	2	1.7%	2.3%	310	1.6%	2.4%
Cafes	4	3.3%	5.2%	510	2.6%	2.9%
Fast Food & Take-Away	5	4.2%	6.1%	490	2.5%	3.1%
Public Houses	3	2.5%	2.6%	1,050	5.4%	3.4%
Restaurants	9	7.5%	5.1%	1,970	10.1%	4.3%
<b>Total</b>	<b>23</b>	<b>19.2%</b>	<b>21.3%</b>	<b>4,330</b>	<b>22.1%</b>	<b>16.1%</b>

Source: Goad

83. The mix of food & beverage operators in Caversham is good whilst the overall provision of outlets sits broadly in line with the UK average. The proportion of restaurants within the centre is notably higher than the UK average (7.5% compared to the UK average of 5.1%).

### Vacancies

84. There are a total of 16 vacant outlets in Caversham which represents 13.3% of the overall outlets (just below than the UK average of 14.1%). 11.9% of the floorspace in Caversham is vacant.
85. The figure below illustrates where vacant units are located in Caversham as of May 2024. As can be seen, vacant units are spread across the centre, with no obvious clusters present.

**Figure 26: Caversham Vacancies Map**



Source: Goad

## Multiple and Independent Representation

86. Caversham has a strong presence of independent retailers, which help to curate a unique and local feel to the centre. Independent retailers include Caversham Herbs (herb shop), Quattro (Italian restaurant), HOPO Furniture, The Collective (café) and HUMOS (perfume shop).
87. Notable national multiples present in Caversham include Tesco Express, Waitrose, Alto Lounge (The Lounges), Superdrug and Costa Coffee.

## Markets

88. Caversham Artisan and Farmers Market operates every Sunday between 10am and 3pm, located in the Waitrose car park. The market is operated by The Artisan Uprising and offers a range of fresh produce, hot food, candles, cakes, homeware and more.

## Retailer Requirements

89. Demand from retailers and leisure operators for representation in a centre is an important indicator of a centre's overall health and viability. The latest published market demand report is set out in the table below.

**Figure 27: Retailer Requirements, Caversham**

Recorded Date	Operator	Sector	Min Sqm	Max Sqm
Apr 24	Lidl	Convenience Retail	1,700	2,400
Sep 24	Majestic Wine	Convenience Retail	230	460
		<b>Total</b>	<b>1,930</b>	<b>2,860</b>

Source: The Requirement List

90. As of October 2024, a review of published operator requirements identified two recorded requirements from retail and leisure operators in the last 12 months, seeking a combined maximum floorspace of up to 2,860 sqm.
91. It should be noted that these are not necessarily operators seeking representation within the centre itself but potentially out-of-centre locations and retail parks.
92. It is also possible that these operators are not looking for opportunities in Caversham specifically, rather they are looking for opportunities in areas similar to and including Caversham.
93. Independent/ smaller operators do not tend to document their desire for retail space in the same way as the larger national multiples and fast-growing organisations, and so gauging the demand for retail space from these businesses is harder.



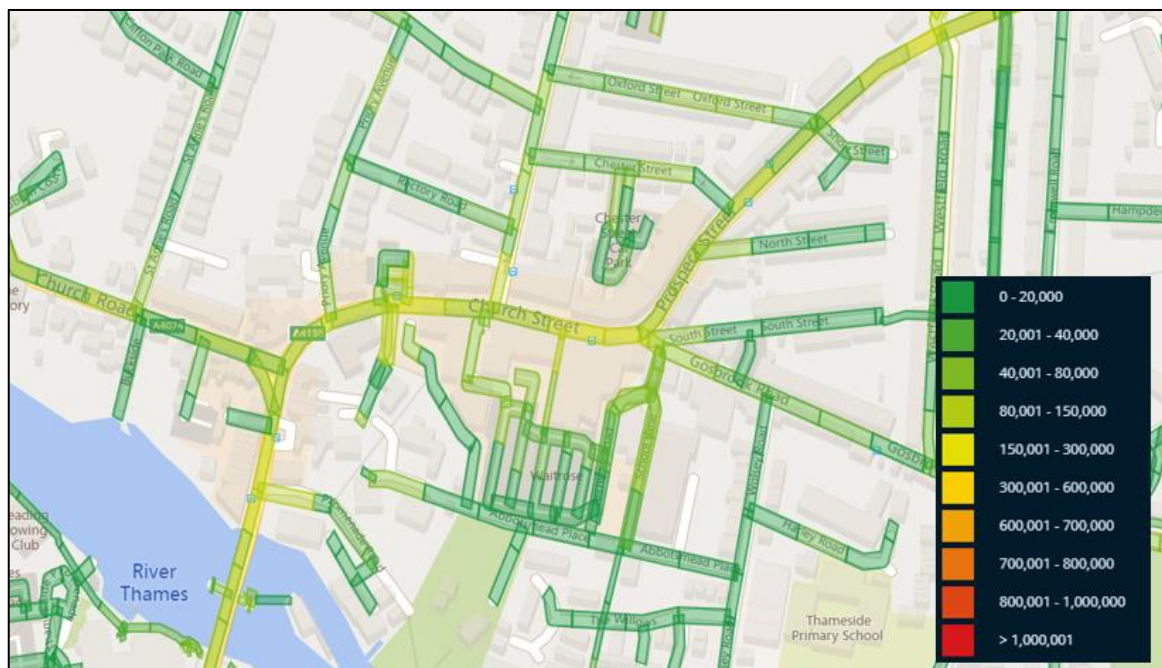
## Commercial Rents and Yields

94. A broad estimate of prime Zone A rental tone within Caversham (Church Street) would indicate a rental level in the region of £375/sqm (£35/sqft) – £430/sqm (£40/sqft).
95. Due to a lack of sales transactions data on investment, yields cannot be identified.

## Pedestrian Flows

96. The figure below illustrates the pedestrian flows for Caversham in the form of a heat map showing total pedestrian movements for September 2024. It shows that footfall is highest along Church Street.

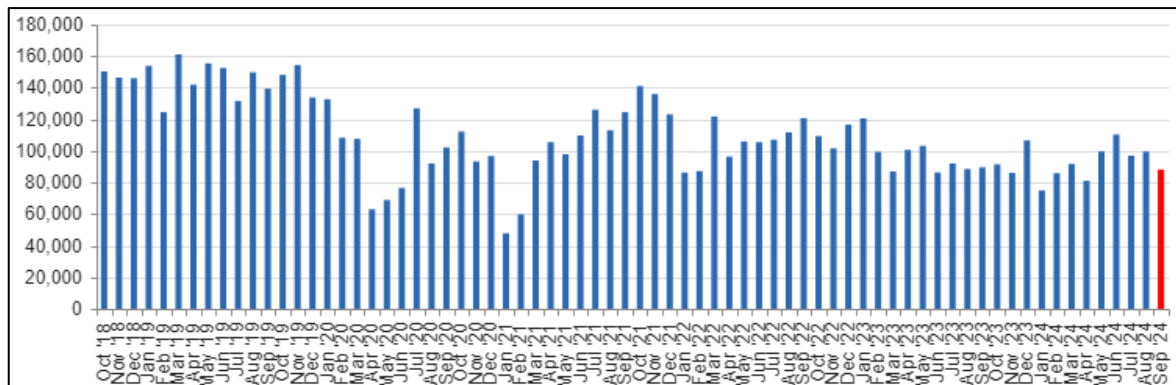
**Figure 28: Caversham Footfall Heat Map, September 2024**



Source: MSCl

97. A central location along Church Street has been sampled to obtain information on how footfall levels have changed between October 2018 and September 2024.
98. As can be seen in the figure below, footfall levels have declined overall in recent years. Whilst the impact of the pandemic was not as drastic as is often seen elsewhere, there is still a notable drop in numbers from April 2020 through to early-2021, from which point pedestrian activity grew positively. From October 2021 onwards however, figures have generally been slowly declining.

**Figure 29: Monthly Footfall Graph, October 2018 - September 2024, Church Street**



Source: MSCI

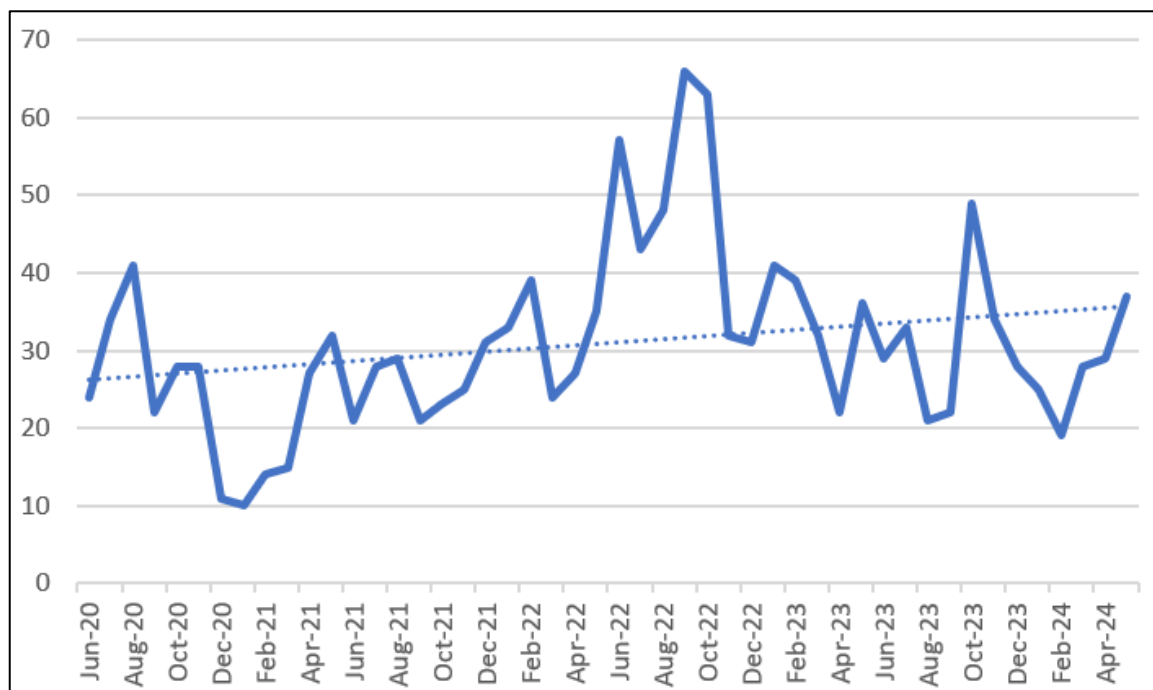
### Accessibility

99. Bus services operate along Church Street and Prospect Street, providing connections north to Emmer Green and beyond and south into Reading.
100. The A4155 feeds through the centre and can be followed north-east through to Henley-on-Thames as well as south into Reading centre.
101. Free customer parking is available for the Waitrose store, accessible via Archway Road (over 100 spaces available), whilst further provision can be found at Chester Street car park (64 spaces). Short stay, on-street parking is also available along Church Road.
102. The busy A road that runs through the centre makes navigating the area on foot more challenging. Several pedestrian crossings (traffic light and zebra) can be found across the centre to assist. There is limited provision for cyclists in the form of cycle lanes and dedicated cycle parking.

### Crime and Safety

103. A central postcode within Caversham was used to review total crime data within a ¼ mile radius between June 2020 and May 2024. The figure below outlines the total crime rate month by month within this period, as well as a trendline to show the overall change in criminal activity over the four years.
104. As can be seen, recorded crime levels peaked during 2022, but have dropped back down since. The trend graph shows a gradual overall increase in criminal activity during this period.

**Figure 30: Caversham Recorded Crimes, June 2020 - May 2024**



Source: UKCrimeStats

105. The top three types of crimes recorded within this area during this period are violence & sexual offences (330 recorded incidences), other theft (266 recorded incidences) and shoplifting (221 recorded incidences).

### Evening and Night Time Economy

106. A sample of leisure outlets within Caversham have been selected with their opening times and more importantly closing times recorded to get a sense of the provision of the evening offer.
107. As outlined below, there is a good range of restaurants with a variety of cuisines available. These are complemented by a selection of pubs and bars which are open until late.

**Figure 31: Leisure Operator Sample**

Retailer Name	Type	Open	Close
Persian Palace	Restaurant	12pm	10:30pm
Lebanese Village	Restaurant	12pm	10-11pm
Thai Table	Restaurant	12-5:30pm	9:30-10:30pm
Alto Lounge	Restaurant	9am	10-11pm
Quattro (Italian)	Restaurant	12-6pm	9-10pm
Clay's Kitchen & Bar (Indian)	Restaurant	1-5pm	11-1:30pm
Vegivores (Vegan)	Restaurant	10-11am	9-10pm

Retailer Name	Type	Open	Close
Crown Caversham	Pub	12pm	10:30-11:30pm
Griffin	Pub	9-11am	10:30-11pm
Angel Bar	Bar	12-4pm	11pm

## Conclusion

108. Overall, the Strengths, Weaknesses, Opportunities, Threats (SWOT) can be summarised as follows:

### Strengths

- Strong provision of retail services.
- Good offer and mix of restaurants and cuisines.
- Strong presence of independent operators.
- Caversham Artisan and Farmers Market.
- Strong connections to and from Reading.
- A good mix of parking provision.

### Weaknesses

- Limited comparison retail floorspace.
- Drop in footfall in recent years.
- Rising crime levels.

### Opportunities

- Capitalise on potential interest from retailers looking to gain representation within the centre.
- Harness the strong presence of independent operators and its market as a point of differentiation from nearby centres.
- Improvements to cycling accessibility.

### Threats

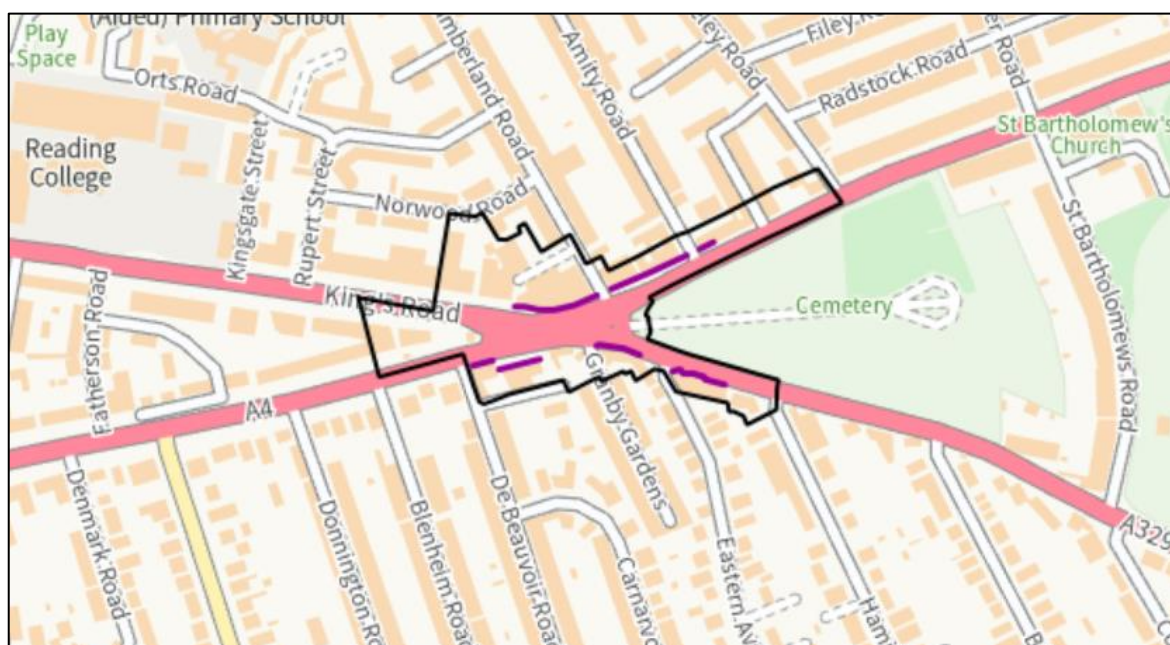
- Rising levels of crime potentially leading to a negative impact on visitor numbers.
- High/ increasing business operating costs.

## 4. Cemetery Junction District Centre Health Check

### Overview

109. As outlined within the Reading Borough Council Local Plan (adopted November 2019), Cemetery Junction is designated as a district centre.
110. It lies to the eastern edge of Reading regional centre, separated by a small section of Kings Road. Cemetery Junction is centred around the Kings Road/ London Road/ Wokingham Road junction.
111. The key frontages (marked in purple in the figure below) cover the retail frontages to the north and south of the centre.
112. As highlighted in the Caversham health check the current Local Plan does not define Primary Shopping Areas for the district centres. In the case of Cemetery Junction, the primary frontage would serve as a guide to inform a PSA for the centre and would be focused on units around the junction with Kings Road/ London Road/ Wokingham Road.

**Figure 32: Cemetery Junction District Centre**



Source: Reading Borough Council Local Plan Proposals Map

### Diversity of Uses

113. There is a limited comparison retail offer within Cemetery Junction district centre. Warm Interiors (fireplace shop) can be found along Wokingham Road.
114. Convenience retail provision is led by a small-format Co-op to the north of the centre, and Tesco Express to the south. These major convenience retailers are supplemented by a selection of smaller, international produce traders.



115. The retail services provision is dominated by health and beauty related services, including barber shops and a tanning shop. A Post Office is also present at the heart of the centre.
116. Leisure services are dominated by fast food & take-away operators, ranging from a fish & chip shop to pizza takeaways. Additional food & beverage operators include the Hope & Bear pub which sits to the west of the centre, Fat Twins & Kaspas Desserts (burger and desserts restaurant) and Early Café.
117. Financial and business services are made up by PropertyMove Estates and Options Mortgage Services, both located along Wokingham Road.

### Vacancies

118. There are several vacant units within the centre. One of which is the standalone, former Smash N Grab unit to the south of the central junction. Another vacant unit sits on the corner at the Amity Road/ London Road junction. In line with the nature of the centre, the vacant units are small in footprint. The total number of vacant units within the centre is not of concern.

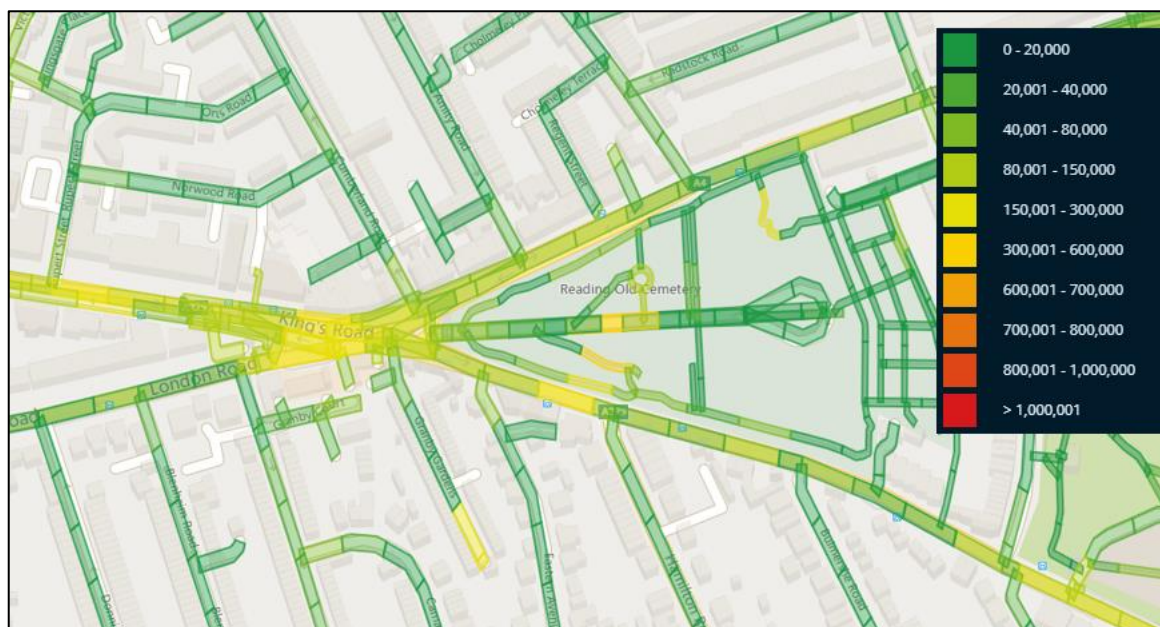
### Multiple and Independent Representation

119. National multiples allow a centre to draw shoppers from beyond its immediate catchment as people search for their nearest store. Cemetery Junction has a limited range of national multiples including Co-op and Tesco Express.
120. Independent retailers are essential to create a unique and local feel to a centre. They help to curate a sense of place and pride within an area for those who live nearby. Cemetery Junction has a select range of independent outlets, including Early Café.

### Pedestrian Flows

121. The figure below illustrates the pedestrian flows for Cemetery Junction in the form of a heat map showing total pedestrian movements for September 2024. It shows that footfall levels are highest at the heart of the centre, focused around the Kings Road/ London Road/ Wokingham Road junction.

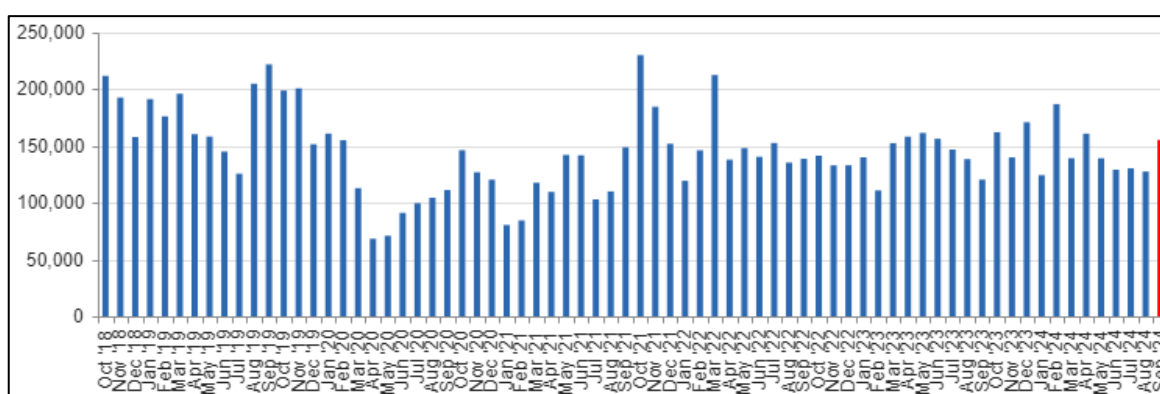
**Figure 33: Cemetery Junction Footfall Heat Map, September 2024**



Source: MSCI

122. A section of Cemetery Junction, located along at the Kings Road/ London Road/ Wokingham Road junction, was sampled to obtain information on how footfall levels have changed between October 2018 and September 2024.
123. As can be seen in the figure below, footfall levels have recovered reasonably well from the pandemic period.

**Figure 34: Monthly Footfall Graph, October 2018 - September 2024, Kings Road/ London Road/ Wokingham Road Junction**



Source: MSCI

## Accessibility

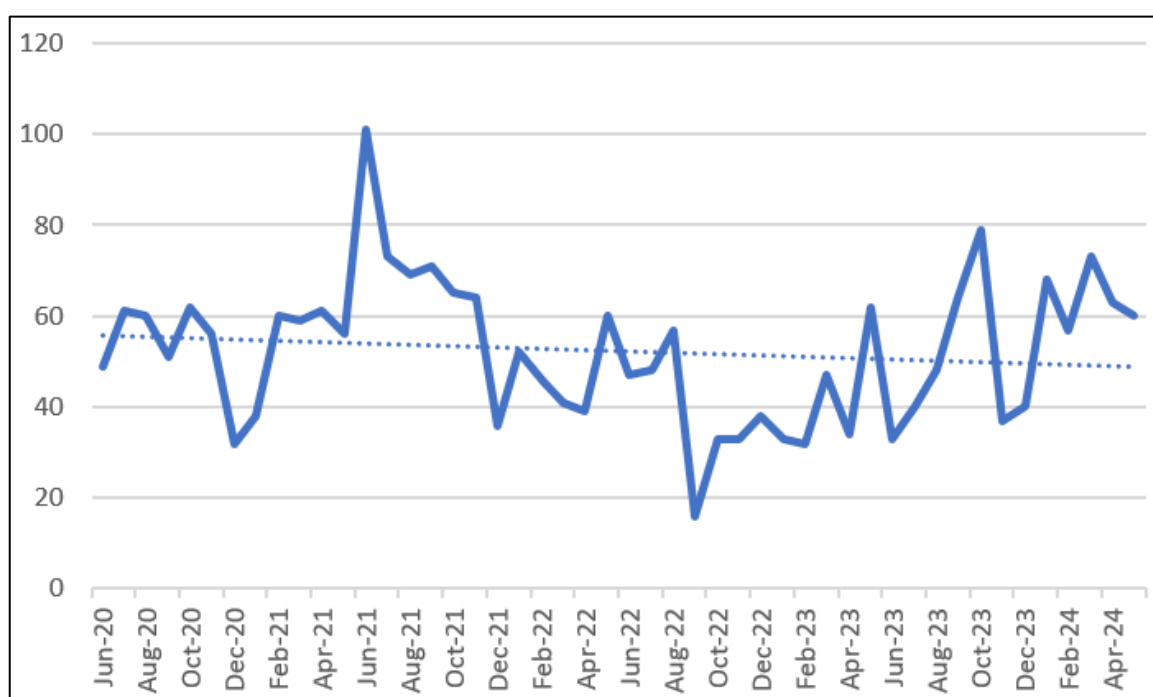
124. Various bus routes service the centre, with connections available into Reading as well as eastwards to High Wycombe and Bracknell.
125. Cemetery Junction is connected to Reading via Kings Road, whilst the A3290 can be picked up to the east providing linkage in the direction of Wokingham and Bracknell.

126. The provision of car parks is limited to the 17-space car park at The Hope & Bear pub, whilst short stay, on-street parking can be found to the front of the Tesco Express store.
127. The multiple lanes of traffic flowing in several directions make it challenging for those navigating the centre on foot or bicycle. There are however pedestrian traffic light crossings (several of which with pedestrian islands), as well as a dedicated cycle and bus lane heading west along Kings Road to support.

## Crime and Safety

128. A central postcode within Cemetery Junction was used to review total crime data within a ¼ mile radius between June 2020 and May 2024. The figure below outlines the total crime rate month by month within this period, as well as a trendline to show the overall change in criminal activity over the four years.
129. As can be seen, recorded crime levels have marginally declined over this period, with a peak month in June 2021 and a low of 16 crimes in the month of September 2022.

**Figure 35: Cemetery Junction Recorded Crimes, June 2020 - May 2024**



Source: UKCrimeStats

130. The top three types of crimes recorded within this area during this period are violence & sexual offences (871 recorded incidences), shoplifting (300 recorded incidences) and anti-social behaviour (283 recorded incidences).

## Evening and Night Time Economy

131. There is a generally limited provision of evening establishments within the centre. The Hope & Bear pub is located to the west of the Kings Road/ London Road/

Wokingham Road, with opening hours of 12pm through to 11pm-12am. Fat Twins (restaurant) is accompanied by Kaspas' desserts to the south of the centre and is open until between 11pm and 12am.

132. Several takeaways are located within the centre however these may not necessarily be driving genuine visitor footfall in the evening due to the delivery nature of their service.
133. The two major convenience stores (Tesco Express and Co-op) are both open until 11pm throughout the week.

## Conclusion

134. Overall, the Strengths, Weaknesses, Opportunities, Threats (SWOT) can be summarised as follows:

### Strengths

- Strong presence of small format convenience retail stores.
- Footfall has recovered from the pandemic period reasonably well.
- Good connections to and from Reading.

### Weaknesses

- Centre is dominated by roads and traffic.
- Limited comparison retail offer.

### Opportunities

- Improvements to car parking provision.

### Threats

- Increased through traffic.
- High/ increasing business operating costs.

## 5. Emmer Green District Centre Health Check

### Overview

135. As outlined within the Reading Borough Council Local Plan (adopted November 2019), Emmer Green is designated as a district centre. The centre is the northernmost of the Borough, approximately 1.5km north of Caversham district centre. It is largely made up of a parade of units with associated car parking, some open green space and further units to the west of Peppard Road accompanied by two pubs.
136. The key frontages (marked in purple within the figure below) are found along a parade of units to the east of Peppard Road, as well as a few units at the Peppard Road/ Kidmore End Road junction.
137. A Primary Shopping Area is not identified within the Local Plan for Emmer Green or the other district centres. Typically, the PSA is used to differentiate the core retail area from a wider town centre boundary. Due to the size of Emmer Green, the town centre boundary provides the most suitable boundary for assessing edge and out of centre schemes for town centre uses against the sequential test.

**Figure 36: Emmer Green District Centre**



Source: Reading Borough Council Local Plan Proposals Map

### Diversity of Uses

138. Emmer Green is led by leisure services, with a mix of pubs (The Black Horse and White Horse), fast food & takeaway outlets (including Domino's, The Master Fryer (fish and chip shop) and Pearl River (Chinese takeaway)) and a café (The Bite Café). There is also a Coral betting shop to the west of Peppard Road.
139. Comparison retail provision comes from a Sue Ryder charity shop and V + I Hardware (DIY store).

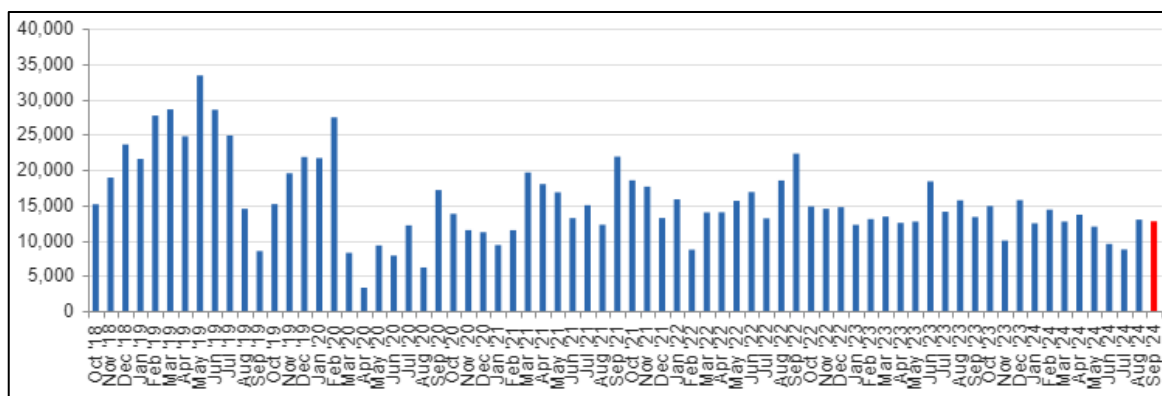


140. Convenience retail is led by Budgens, which is supported by Village Wines and Beer.
141. Retail services include the Post Office and a selection of health & beauty operators (barbers and beauty salons).

### Pedestrian Flows

142. A section of Emmer Green, located along Peppard Road (by the Budgens store), was sampled to obtain information on how footfall levels have changed between October 2018 and September 2024.
143. As can be seen in the figure below, footfall levels have dropped significantly from the pre-pandemic period that has been reviewed. Where monthly figures were regularly above 20,000 between October 2018 and February 2020, this figure has only been surpassed on two occasions since (September 2021 and September 2022).

**Figure 37: Monthly Footfall Graph, October 2018 - September 2024, Peppard Road**



Source: MSCI

### Accessibility

144. Bus services operate along Peppard Road and provide connections to Caversham and Reading to the south. A car park can be found to the east of Peppard Road, in front of the parade of shops. Electric vehicle charging points are on offer within this car park. Further parking can be found to the west of the main road, with four spaces available by Coral and dedicated customer parking at White Horse pub. The parade of shops provides a pedestrian friendly area to navigate, whilst a pedestrian traffic light crossing is located by Coral to further assist those on foot. Cycle parking can be found at the parade of shops, supporting those travelling to and from the centre by bike.

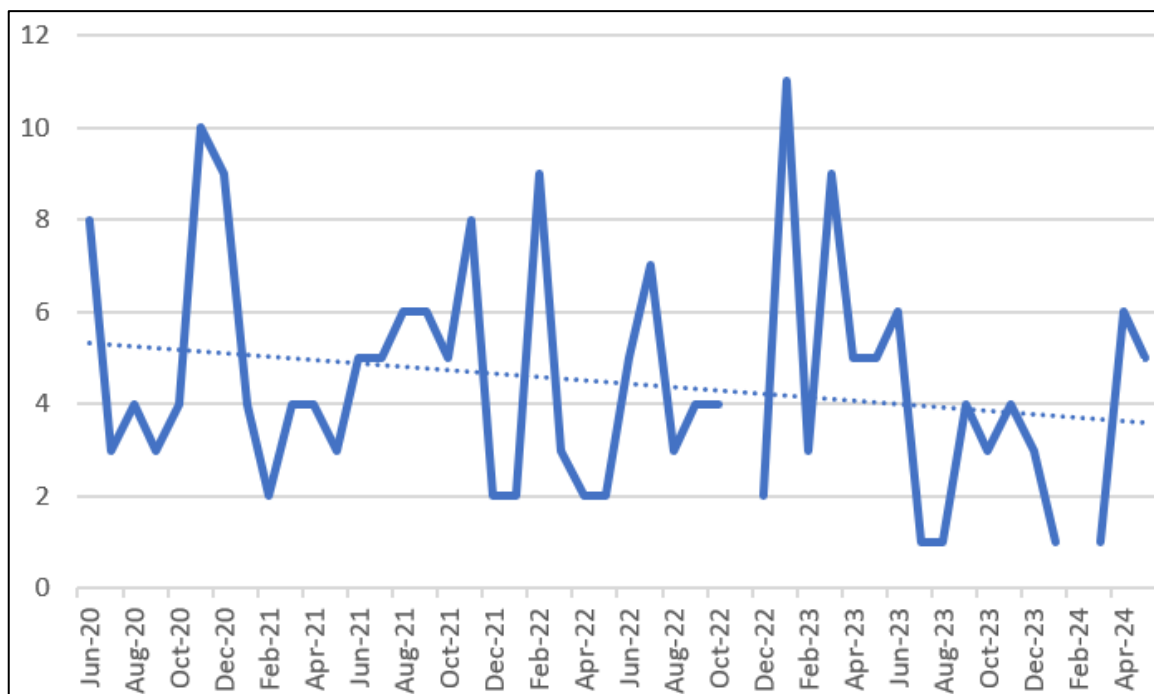
### Crime and Safety

145. A central postcode within Emmer Green was used to review total crime data within a ¼ mile radius between June 2020 and May 2024. The figure below outlines the

total crime rate month by month within this period, as well as a trendline to show the overall change in criminal activity over the four years.

146. As can be seen, recorded crime levels are low and have trended downwards during this period.

**Figure 38: Emmer Green Recorded Crimes, June 2020 - May 2024**



Source: UKCrimeStats

147. The top three types of crimes recorded within this area during this period are violence & sexual offences (55 recorded incidences), anti-social behaviour (34 recorded incidences) and public order offences (26 recorded incidences).

### Evening and Night Time Economy

148. The evening offer within Emmer Green is largely made up by the two pubs to the west of the centre. The White Horse pub is open between 11:30am and 10:30/11pm, while The Black Horse opens at 12pm and closes at 11pm.
149. A selection of takeaways are located along the parade of units to the east of the centre, however these may not necessarily be driving genuine evening visitor footfall due to the delivery nature of their service. Budgens, which is also located along the parade, closes at 9pm (Monday to Saturday).

## Conclusion

150. Overall, the Strengths, Weaknesses, Opportunities, Threats (SWOT) can be summarised as follows

### Strengths

- Good food & beverage offer in relation to the centre's size – two pubs plus takeaways.
- Convenient and accessible parking provision across the centre.
- Bus connections to and from Reading.
- Low levels of crime recorded.

### Weaknesses

- Significant drop in footfall levels in recent years.

### Opportunities

- Make more of the public realm space (to the front of the parade of units as well as the grassed areas surrounding the car park) to attract visitors and to increase their dwell times – potential for seating, planting and other features (potentially including the relocation of the nearby children's play area).

### Threats

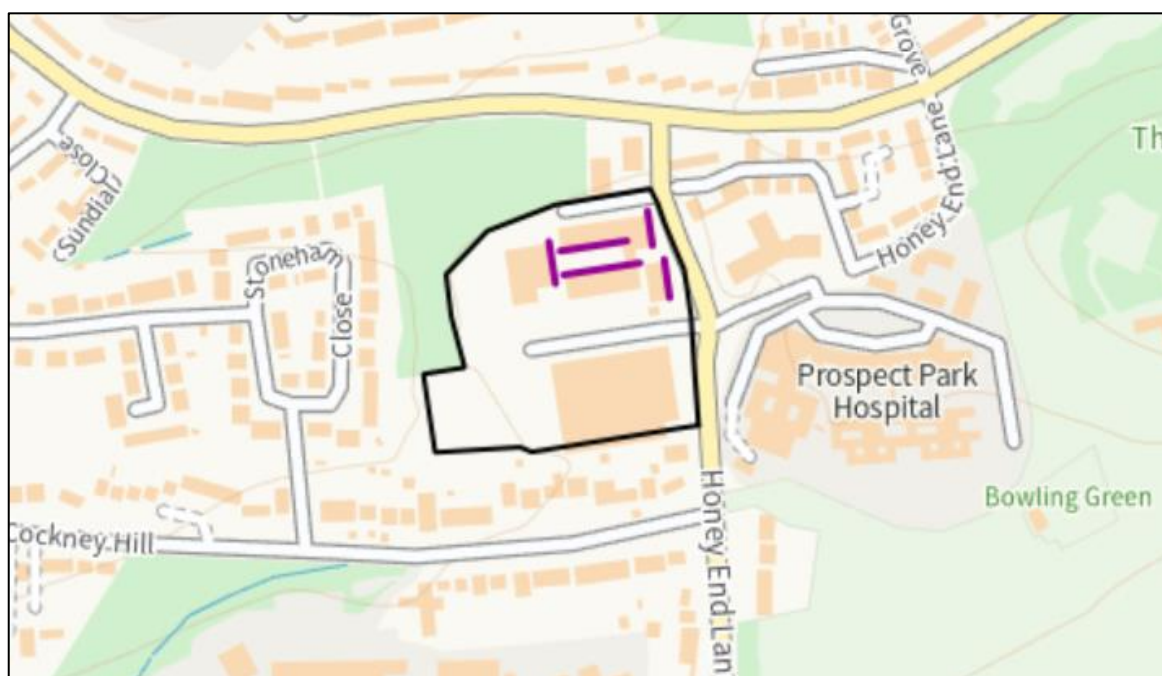
- High/ increasing business operating costs.

## 6. Meadway District Centre Health Check

### Overview

151. As outlined within the Reading Borough Council Local Plan (adopted November 2019), Meadway is designated as a district centre.
152. The centre is made up of Meadway shopping centre to the north and a large Asda store to the south. The shopping centre is tired and dated, however, outline planning permission for its redevelopment was approved in October 2021. Plans include 258 new homes as well as retail and leisure units.
153. The key frontages (marked in purple within the figure below) can be found within Meadway shopping centre.
154. Typically, the PSA is used to differentiate the core retail area from a wider town centre boundary. For Meadway District Centre, the defined centre boundary covers the shopping precinct and the Asda store and car park. This provides the most suitable boundary for assessing edge and out of centre schemes for town centre uses against the sequential test.

**Figure 39: Meadway District Centre**



Source: Reading Borough Council Local Plan Proposals Map

### Diversity of Uses

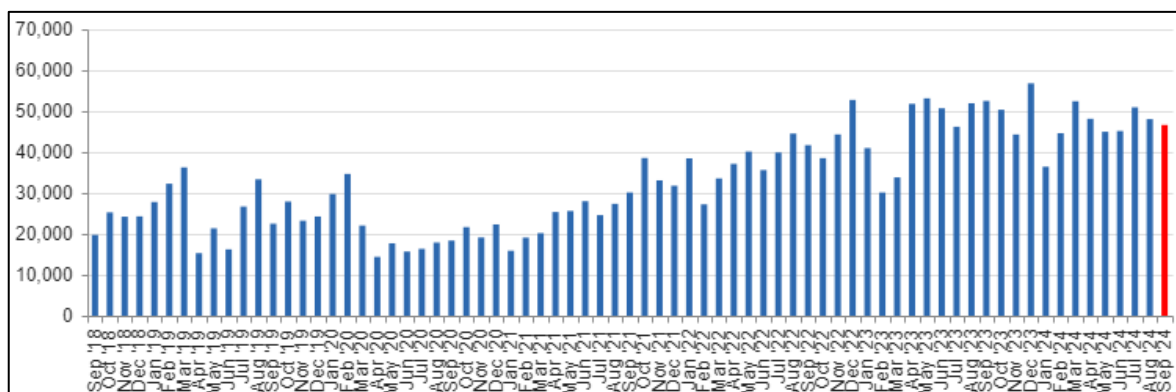
155. Meadway is dominated by the convenience retail offer of the large Asda store (approximately 5,250 sqm). The store has a large, dedicated car park as well as an in-store pharmacy, opticians and café.
156. Meadway shopping centre in the northern half of Meadway has a mix of comparison retail (Meadway Carpets & Flooring and Sue Ryder charity shop), retail services

(Tilehurst Launderette & Dry Cleaners, Meadway Barbers and Mixture Tattoo Studio) and leisure services (Lee's Garden Takeaway, The Everest Tandoori restaurant, Sea Master fish & chip shop, The Grove Café, Wok U Like Chinese takeaway, 365 Gym and Betfred betting shop).

## Pedestrian Flows

157. A section of Meadway district centre, located by the Asda store entrance, was sampled to obtain information on how footfall levels have changed between October 2018 and September 2024.
158. As can be seen in the figure below, footfall levels have grown significantly during this period.

**Figure 40: Monthly Footfall Graph, October 2018 - September 2024, Meadway Asda Entrance**



Source: MSCI

## Accessibility

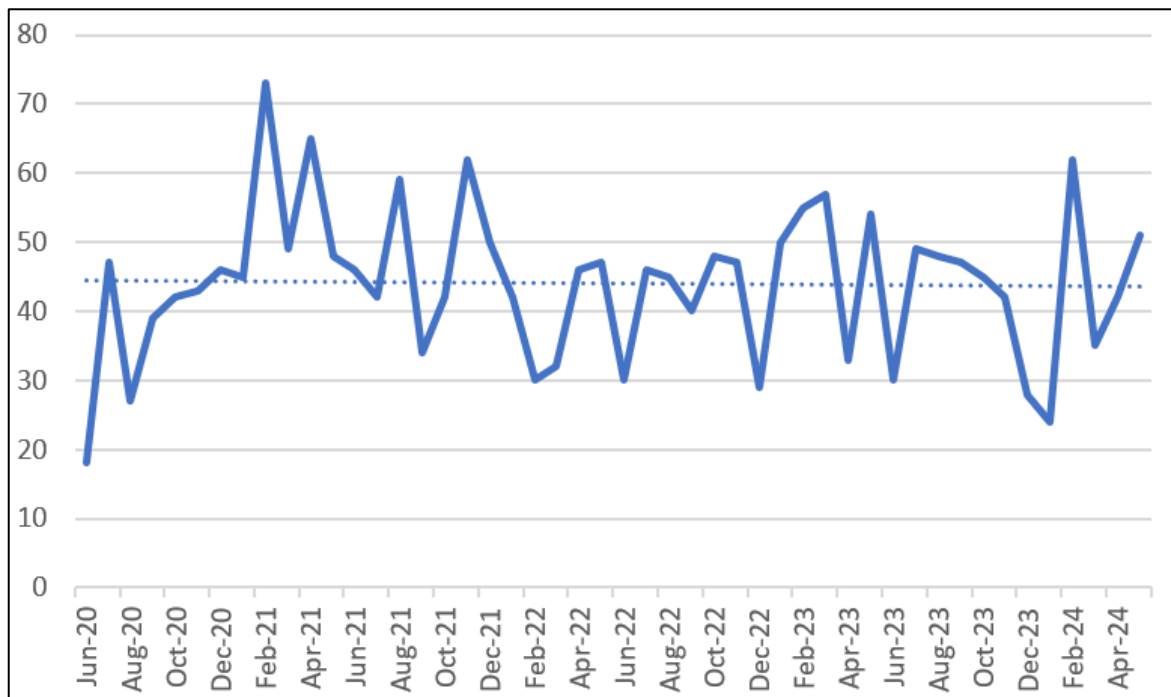
159. Bus routes in and nearby to the centre provide connections west to Tilehurst and east into Reading. Large car parks can be found to the west of the centre for both the Asda store and Meadway shopping centre. The pedestrianised nature of the shopping centre supports those navigating the centre on foot, whilst cycle parking is available for those travelling to and from the centre by bike.

## Crime and Safety

160. A central postcode within Meadway was used to review total crime data within a ¼ mile radius between June 2020 and May 2024. The figure below outlines the total crime rate month by month within this period, as well as a trendline to show the overall change in criminal activity over the four years.
161. As indicated by the trendline, criminal activity overall has been stable during this period. A peak month was recorded in February 2021 (71 crimes), whilst June 2020 represents a low for the period.



**Figure 41: Meadway Recorded Crimes, June 2020 - May 2024**



Source: UKCrimeStats

162. The top three types of crimes recorded within this area during this period are violence & sexual offences (1,155 recorded incidences), public order offences (200 recorded incidences) and criminal damage & arson (188 recorded incidences).

### Evening and Night Time Economy

163. There is a limited provision of evening establishments within the centre. The Everest Tandoori is a Nepalese restaurant which has a closing time of between 10pm and 11:30pm. A few takeaways are located within the centre however these may not necessarily be driving genuine evening visitor footfall due to the delivery nature of their service. The Asda store remains open until 11pm from Monday through to Friday (10pm Saturday and 4pm Sunday).

### Conclusion

164. Overall, the Strengths, Weaknesses, Opportunities, Threats (SWOT) can be summarised as follows:

#### Strengths

- Strong convenience offer – Asda store acts as a strong anchor for the centre.
- Good parking provision.
- Growth in footfall in recent years.
- Bus connections to and from Reading.
- Pedestrian friendly shopping centre area.

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### Weaknesses

- Limited evening economy.
- Dated and tired shopping centre.

### Opportunities

- The redevelopment of the shopping centre and associated increase in residential population as a catalyst for the revitalisation of the centre.
- Improvements to the public realm through open spaces and greenery/ vibrancy as part of any potential redevelopment.

### Threats

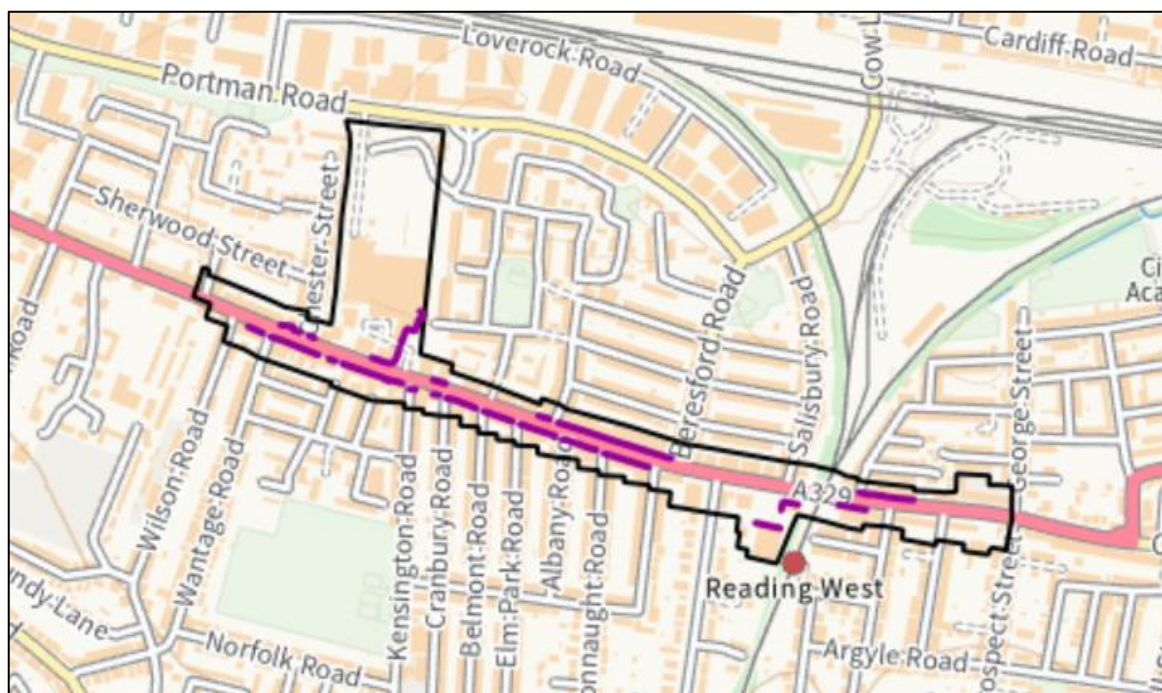
- High/ increasing business operating costs.
- Current obstacles and challenges relating to the delivery of medium-to-large-scale redevelopment projects possibly causing delays to/ complications with the potential delivery of any redevelopment of the shopping centre.

## 7. Oxford Road West District Centre Health Check

### Overview

165. As outlined within the Reading Borough Council Local Plan (adopted November 2019), Oxford Road West is designated as a district centre. The centre sits just west of Reading regional centre, separated by a small section of Oxford Road.
166. The A329 feeds through the centre from east to west, with the centre stretching approximately 1.2km in width. The boundary extends north to encompass the Tesco Extra store to the west of the centre.
167. The key frontages (marked in purple in the figure below) run along Oxford Road, with most of its coverage found to the west of the Beresford Road/ Oxford Road junction.
168. Typically, the PSA is used to differentiate the core retail area from a wider town centre boundary. For Oxford Road West, the defined primary shopping frontages broadly cover the entirety of the defined centre boundary. As such, the town centre boundary (including the Tesco Extra site) provides the most suitable boundary for assessing edge and out of centre schemes for town centre uses against the sequential test.

**Figure 42: Oxford Road West District Centre**



Source: Reading Borough Council Local Plan Proposals Map

### Diversity of Uses

169. Goad data from May 2024 has been used to assess Oxford Road West's mix of uses. The figure below shows the area covered by Goad.

**Figure 43: Oxford Road West Goad Coverage Map**



Source: Goad

170. The table below shows that Oxford Road West has a total of 149 units and an overall quantum of 25,960 sqm in floorspace.

**Figure 44: Oxford Road West Diversity of Uses, Outlets and Floorspace**

	No. of Outlets	% of Total Outlets		Gross Floorspace (sqm)	% of Total Floorspace	
		Oxford Road West	UK Average		Oxford Road West	UK Average
Comparison Retail	19	12.8%	26.3%	2,520	9.7%	29.2%
Convenience Retail	37	24.8%	9.3%	14,960	57.6%	15.6%
Retail Services	31	20.8%	16.0%	2,180	8.4%	7.4%
Leisure Services	40	26.8%	25.8%	4,270	16.4%	26.7%
Financial & Business Services	8	5.4%	8.3%	440	1.7%	6.2%
Vacant	14	9.4%	14.1%	1,590	6.1%	14.3%
<b>Total</b>	<b>149</b>	<b>100.0%</b>	<b>100.0%</b>	<b>25,960</b>	<b>100.0%</b>	<b>100.0%</b>

Source: Goad

171. The centre has a strong provision of convenience retail, retail services and leisure services. Convenience retail makes up over half of the floorspace within the centre, with the Tesco Extra store accounting for 9,490 sqm of the total 14,960 sqm of convenience floorspace. A Lidl store is also located by Reading West train station. This large-scale convenience offer is supplemented by a selection of smaller, international produce traders.

**Figure 45: Oxford Road West Food & Beverage, Outlets and Floorspace**

	No. of Outlets	% of Total Outlets		Gross Floorspace (sqm)	% of Total Floorspace	
		Oxford Road West	UK Average		Oxford Road West	UK Average
Bars & Wine Bars	2	1.3%	2.3%	410	1.6%	2.4%
Cafes	8	5.4%	5.2%	950	3.7%	2.9%
Fast Food & Take-Away	20	13.4%	6.1%	1,570	6.0%	3.1%
Public Houses	2	1.3%	2.6%	350	1.3%	3.4%
Restaurants	4	2.7%	5.1%	390	1.5%	4.3%
<b>Total</b>	<b>36</b>	<b>24.2%</b>	<b>21.3%</b>	<b>3,670</b>	<b>14.1%</b>	<b>16.1%</b>

Source: Goad

172. Fast food & takeaway outlets dominate the food & beverage provision, with the 20 units accounting for 13.4% of the total number of units within Oxford Road West.

### Vacancies

173. There are a total of 14 vacant outlets in Oxford Road West which represents 9.4% of the overall outlets (lower than the UK average of 14.1%). 6.1% of the floorspace in Oxford Road West is vacant.
174. The image below illustrates where vacant units are located in Oxford Road West as of May 2024. As can be seen, they are spread across the centre, with no obvious clusters present.

**Figure 46: Oxford Road West Vacancies Map**



Source: Goad

### Multiple and Independent Representation

175. National multiples allow a centre to draw shoppers from beyond its immediate catchment as people search for their nearest store and are willing to travel further



for brands such as John Lewis and M&S. Oxford Road West has a select range of national multiples including Tesco (Extra and Express), Lidl and McDonald's.

176. Independent retailers are essential to create a unique and local feel to a centre. They help to curate a sense of place and pride within an area for those who live nearby. Oxford Road West has a range of independent outlets, including Music Man (music shop), Connect Afrique (hair and cosmetics shop) and Style Nation by Kimmy (hair and beauty).

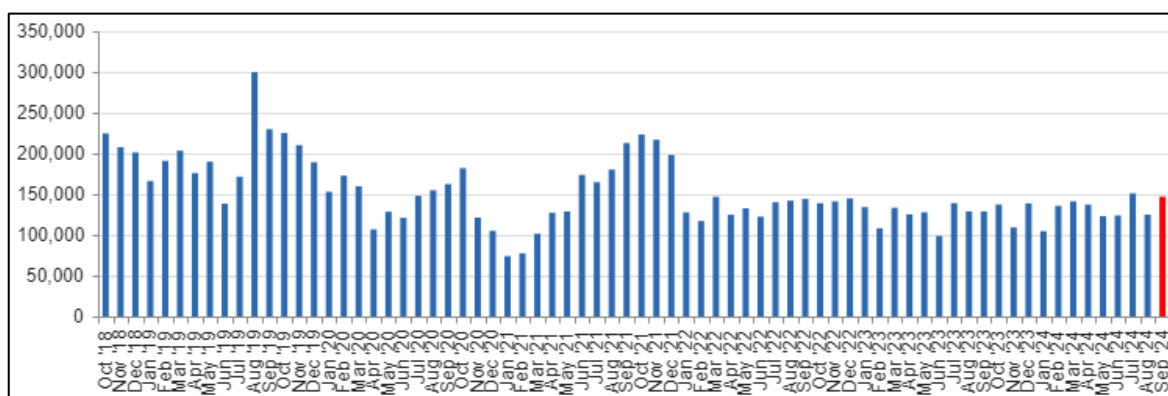
## Commercial Rents and Yields

177. A broad estimate of prime Zone A rental tone within Oxford Road West (Oxford Road) would indicate a rental level in the region of £270/sqm (£25/sqft) – £325/sqm (£30/sqft).
178. Due to a lack of sales transactions data on investment, yields cannot be identified.

## Pedestrian Flows

179. A central section of Oxford Road West (along Oxford Road) was sampled to obtain information on how footfall levels have changed between October 2018 and September 2024.
180. As can be seen in the figure below, footfall levels showed positive signs in 2021, following the height of the pandemic in 2020. 2022 onwards however has seen pedestrian activity drop back down to a level notably lower than recorded pre-pandemic.

**Figure 47: Monthly Footfall Graph, October 2018 - September 2024, Oxford Road**



Source: MSCI

## Accessibility

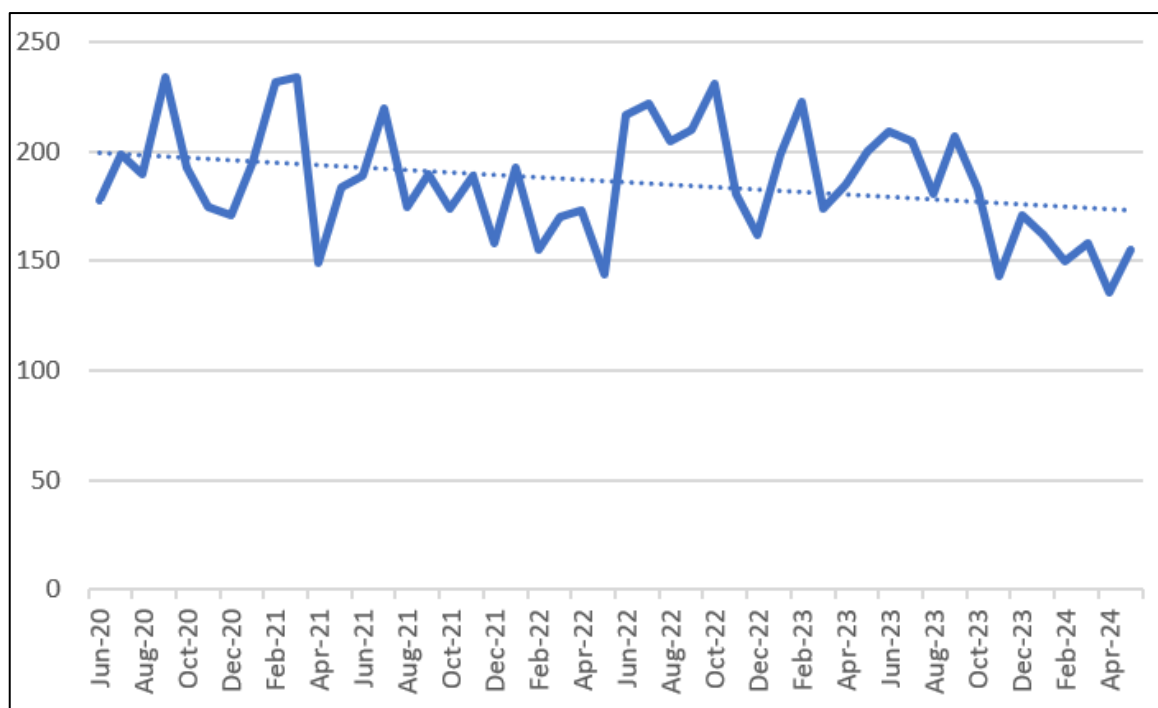
181. Reading West train station is located by the centre and provides regular connections into Reading, with a journey time of four minutes. Services also run south to Basingstoke and east in the direction of Newbury and beyond. Various bus routes run along Oxford Road and connect the centre with Reading to the east and Tilehurst and Theale to the west.

182. The A329 feeds through the centre from east to west and provides a direct route into Reading, as well as westwards to Pangbourne and beyond.
183. Centre parking can be found Oxford Road car park, just south of the Tesco store (26 spaces), whilst Tesco, Lidl and McDonalds have their own dedicated/ shared parking provision. On-street parking can be found at various points along Oxford Road.
184. Whilst the busy A road creates challenges for those navigating the centre on foot, there are multiple pedestrian traffic light crossings as well as pedestrian islands to assist. Cycle storage can be found across the centre to support those travelling to and from the centre by bike.

### Crime and Safety

185. A central postcode within Oxford Road West was used to review total crime data within a ½ mile radius between June 2020 and May 2024. The figure below outlines the total crime rate month by month within this period, as well as a trendline to show the overall change in criminal activity over the four years.
186. As can be seen, recorded crime levels have declined during this period, with the trendline dropping from approximately 200 crimes to around 175 crimes per month.

**Figure 48: Oxford Road West Recorded Crime, June 2020 - May 2024**



Source: UKCrimeStats

187. The top three types of crimes recorded within this area during this period are violence & sexual offences (3,432 recorded incidences), anti-social behaviour (995 recorded incidences) and public order offences (887 recorded incidences).

## Evening and Night Time Economy

188. A sample of predominantly leisure outlets within Oxford Road West have been selected with their opening times and more importantly closing times recorded to get a sense of the provision of the evening offer.
189. As outlined below, there is a good range of restaurants with a variety of cuisines available. In addition, McDonald's is open until late, as are the various takeaways across the centre.

**Figure 49: Leisure Operator Sample**

Retailer Name	Type	Open	Close
Avila (West African)	Restaurant & Bar	12-4pm	6-11pm
Betty's Bistro (African)	Restaurant	1:30pm	8-9pm
Kobeda Palace (Afghan & Mediterranean)	Restaurant	1-2pm	11:45pm
Vampires Den (Romanian)	Restaurant	1-2pm	10pm
Reading Tandoori (Indian)	Restaurant	11am-12pm	11pm-12am
McDonald's	Fast Food Restaurant	5am	12:45am
The White Eagle	Pub	12pm	12-30-1am

## Conclusion

190. Overall, the Strengths, Weaknesses, Opportunities, Threats (SWOT) can be summarised as follows:

### Strengths

- Strong convenience retail offer.
- Low vacancy rate.
- Good mix of national multiples and independents operators.
- Footfall levels were resilient to the impacts of the pandemic period.
- Good connections to and from Reading.
- Train station providing connections to major towns and cities.
- Decline in recorded levels of crime in recent years.

### Weaknesses

- Limited comparison retail offer.
- Dominance of fast food & takeaways within the food & beverage offer.

- 
- Busy road cutting through the centre poses challenges to pedestrians and cyclists.

#### Opportunities

- Further improvements to accessibility for pedestrians and cyclists through increased provision of related support and additional traffic calming measures.

#### Threats

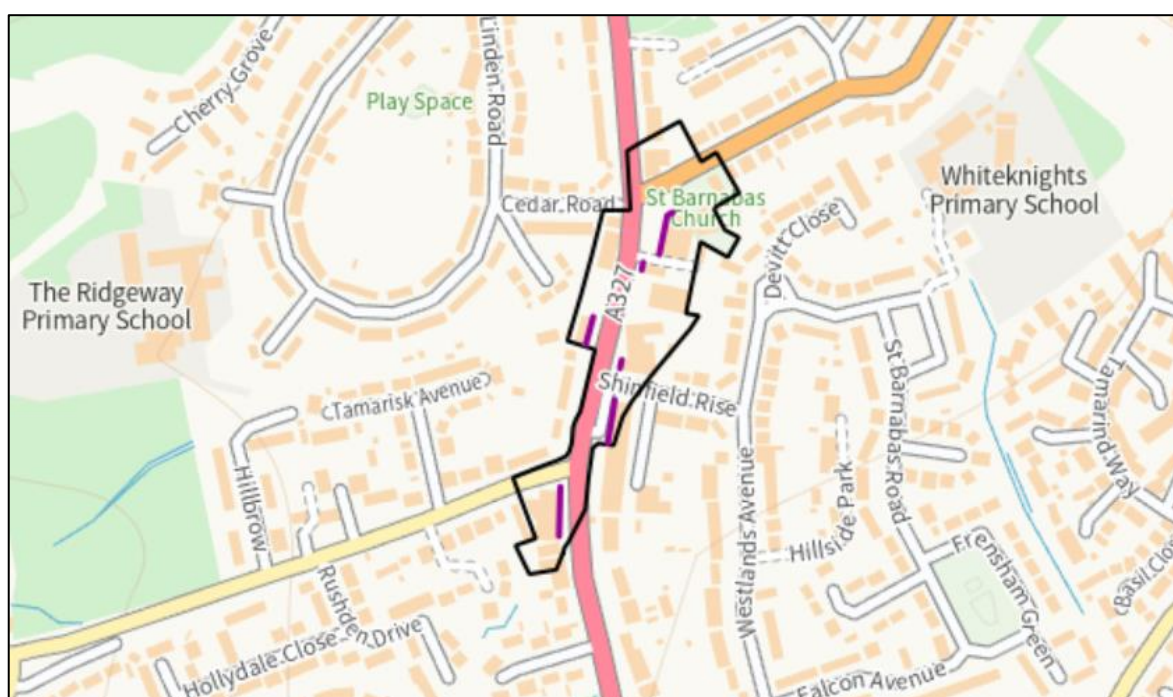
- Increased through traffic.
- High/ increasing business operating costs.

## 8. Shinfield Road District Centre Health Check

### Overview

191. As outlined within the Reading Borough Council Local Plan (adopted November 2019), Shinfield Road is designated as a district centre. It is the southern-most district centre within the Borough, located along the A327, with partial offshoots along Elm Road and Whitley Wood Road.
192. The key frontages (marked in purple within the figure below) are found along the A327, both to the east and west of the road.
193. Typically, the PSA is used to differentiate the core retail area from a wider town centre boundary. Due to the size of Shinfield Road District Centre, the town centre boundary provides the most suitable boundary for assessing edge and out of centre schemes for town centre uses against the sequential test.

**Figure 50: Shinfield Road District Centre**



Source: Reading Borough Council Local Plan Proposals Map

### Diversity of Uses

194. Shinfield Road district centre's mix of uses includes:
  - Comparison retail - Sue Ryder (charity shop)
  - Convenience retail - Shinfield Local Convenience Store, Londis (part of Shell petrol station), Honey & Ghee (Indian convenience store) and Tesco Express
  - Retail services - Whitley Nail Bar, First Class Turkish Barbers, Forresters (hair salon) and Specsavers



- Leisure services - China Garden (Chinese restaurant), Bodrum Corner Café, Shapla Tandoori (Indian takeaway), Pizza Hut (delivery/ takeaway), Mr Cod (fish & chip shop), Papa Johns (delivery/ takeaway), Best Kebab House (takeaway), Red Onion Tandoori (Indian takeaway), Ladbrokes (betting shop), Subway, KFC, Greggs, Jamrock Grill (Jamaican takeaway) and The Sportsman (pub)
- Financial & business services - Somerville Glass & Windows Ltd.

195. In recent years, the Sainsbury's Local store to the west of Shinfield Road closed down. Honey & Ghee (Indian convenience store) now occupies this unit.

### Vacancies

196. Shinfield Road district centre has a limited number of vacant units. Whilst the former Sainsbury's Local store was vacant for a period, this is now occupied by an alternative convenience offer, as previously outlined.

197. The former Firezza (pizza delivery/ takeaway) unit to the southern edge of the centre is currently vacant.

### Multiple and Independent Representation

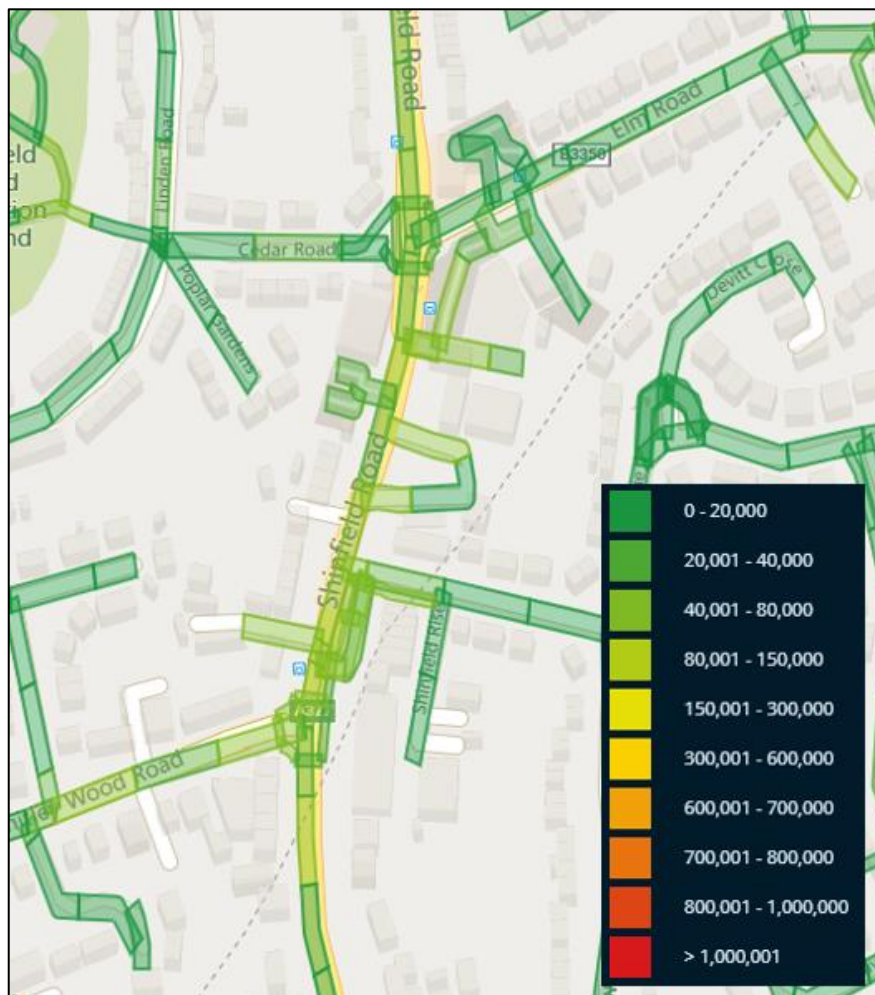
198. National multiples allow a centre to draw shoppers from beyond its immediate catchment as people search for their nearest store and are willing to travel further for brands such as John Lewis and M&S. Shinfield Road has a range of national multiples including KFC, Tesco Express, Specsavers and Greggs.

199. Independent retailers are essential to create a unique and local feel to a centre. They help to curate a sense of place and pride within an area for those who live nearby. Shinfield Road district centre has a select range of independent outlets, including Bodrum Corner Café, Honey & Ghee (Indian convenience store) and Jamrock Grill.

### Pedestrian Flows

200. The figure below illustrates the pedestrian flows for Shinfield Road in the form of a heat map showing total pedestrian movements for September 2024. It shows that pedestrian activity is generally quite low and evenly spread throughout the centre.

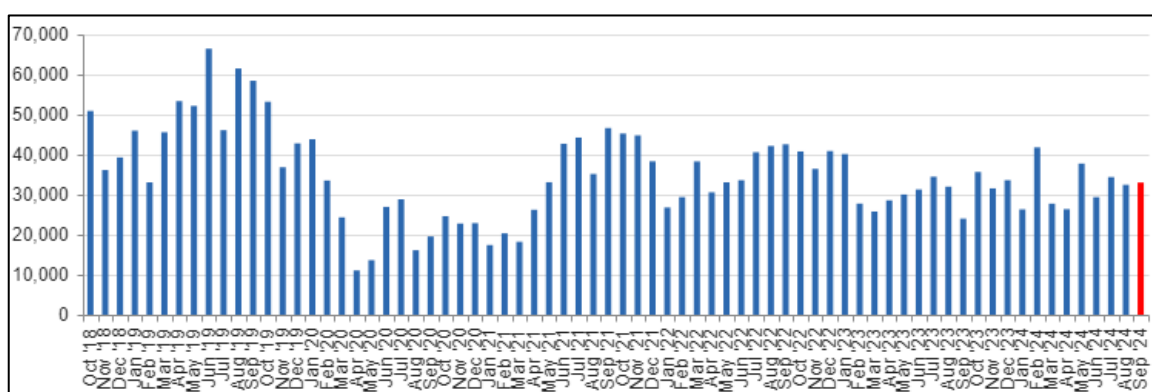
**Figure 51: Shinfield Road Footfall Heat Map, September 2024**



Source: MSCI

201. A central location of Shinfield Road district centre was sampled to obtain information on how footfall levels have changed between October 2018 and September 2024.
202. As can be seen in the figure below, whilst footfall levels have recovered following the pandemic period, they have not fully returned to pre-pandemic figures.

**Figure 52: Monthly Footfall Graph, October 2018 - September 2024, Shinfield Road**



Source: MSCI

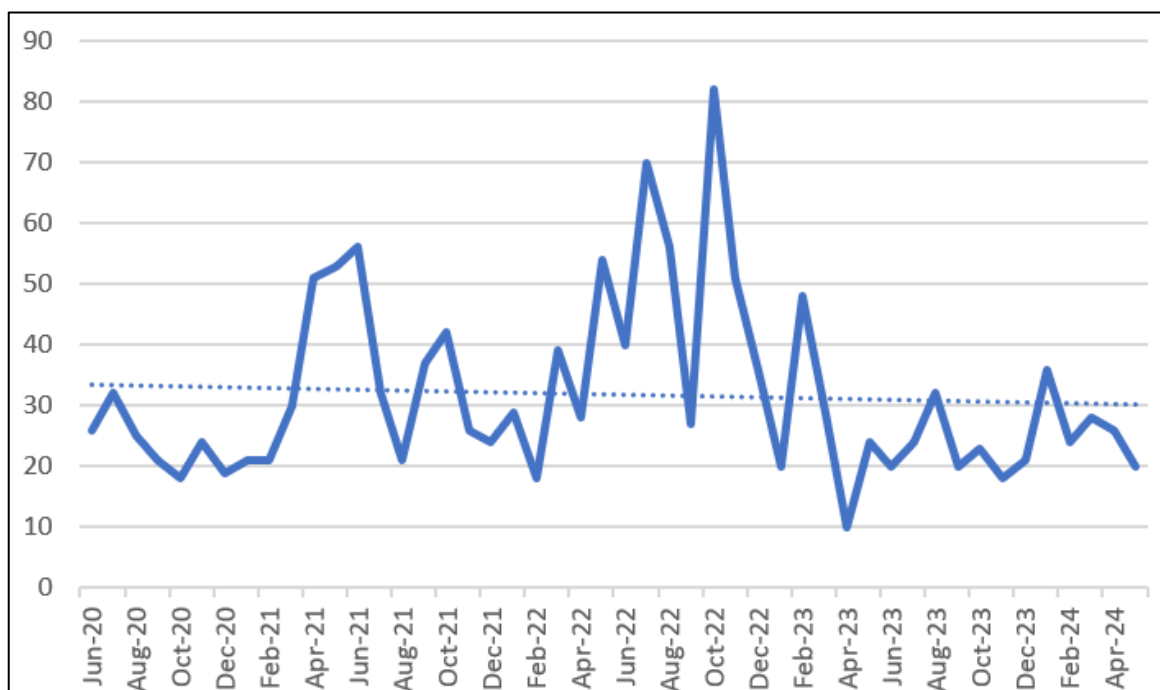
## Accessibility

203. Bus routes serve the centre and provide connections into Reading as well as to Woodley, Wokingham, Reading Gate Retail Park & Select Car Leasing Stadium (Reading Football Club) and more. The A327 (Shinfield Road) connects to Reading to the north and the M4 to the south. A mixture of dedicated, shared and on-street parking can be found across the centre including at Whiteknights Retail Centre (shared car park), Honey & Ghee (Indian convenience store) (dedicated car park), by China Garden & accompanying units (on-street parking) and The Sportsman (pub) (dedicated car park). Pedestrian traffic light crossings can be found to the south of the centre, at the Shinfield Road/ Whitley Wood Road junction and to the north, by the Shinfield Road/ Elm Road junction, to assist pedestrians with navigating the centre on foot. There is a gap in crossing provision between these locations, however. Cycle parking can be found in several locations.

## Crime and Safety

204. A central postcode within Shinfield Road was used to review total crime data within a ¼ mile radius between June 2020 and May 2024. The figure below outlines the total crime rate month by month within this period, as well as a trendline to show the overall change in criminal activity over the four years.
205. As can be seen, recorded crime levels for this period peaked in 2022, but have since dropped back down, leaving the trendline showing a marginal decline in overall crime across the four years.

**Figure 53: Shinfield Road Recorded Crimes, June 2020 - May 2024**



Source: UKCrimeStats

206. The top three types of crimes recorded within this area during this period are violence & sexual offences (493 recorded incidences), shoplifting (385 recorded incidences) and public order offences (161 recorded incidences).

### Evening and Night Time Economy

207. There is a limited provision of evening establishments within the centre. The Sportsman pub is located at the northern edge of Shinfield Road district centre, with opening hours of 12pm until 11pm. China Garden (Chinese restaurant) can be found to the south of the centre and is open until 10pm.
208. Several takeaways are located within the centre however these may not necessarily be driving genuine visitor footfall due to the delivery nature of their service.

### Conclusion

209. Overall, the Strengths, Weaknesses, Opportunities, Threats (SWOT) can be summarised as follows:

#### Strengths

- Good mix of convenience retail stores relative to the centre's size.
- Evidence of demand to occupy vacant units where they arise (Sainsbury's Local to Honey & Ghee).
- Limited number of vacant units.
- Bus connections to and from Reading.
- Good mix of parking available.

#### Weaknesses

- Limited comparison retail offer.
- Food & beverage offer dominated by fast food & takeaway outlets.
- Absence of pedestrian crossings in the middle of the centre.
- Limited evening economy and related leisure establishments.

#### Opportunities

- Further support for pedestrians in the form of a crossing (traffic light/ zebra/ island) in the middle of the centre.

#### Threats.

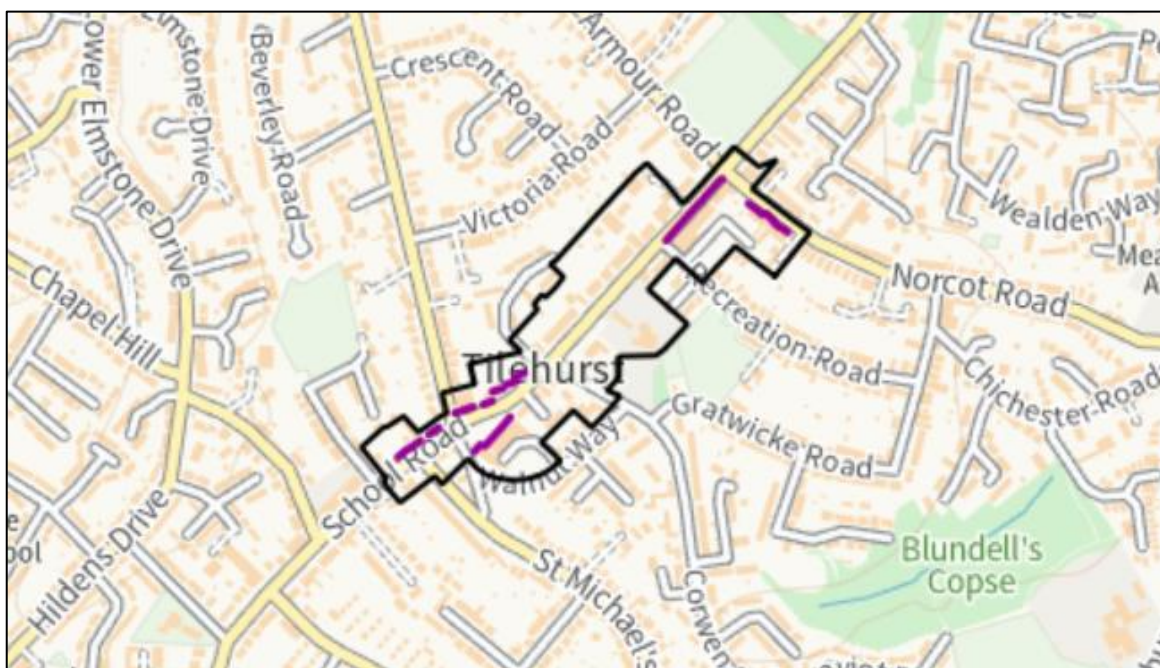
- High/ increasing business operating costs.

## 9. Tilehurst Triangle District Centre Health Check

### Overview

210. As outlined within the Reading Borough Council Local Plan (adopted November 2019), Tilehurst Triangle is designated as a district centre. The centre is the western-most in the Borough and is largely focused along School Road.
211. The key frontages (marked in purple within the figure below) can be found to the south west of the centre, and north east, with a gap at its core (where Tilehurst Library and Park Lane Primary School are located).
212. Typically, the PSA is used to differentiate the core retail area from a wider town centre boundary. The distribution of primary shopping frontages makes it difficult to separate out a defined PSA, which would result in two separate boundaries to reflect retail and commercial uses at either end of the defined centre boundary. Therefore, the town centre boundary provides the most suitable boundary for assessing edge and out of centre schemes for town centre uses against the sequential test.

**Figure 54: Tilehurst Triangle District Centre**



Source: Reading Borough Council Local Plan Proposals Map

### Diversity of Uses

213. Goad data from May 2024 has been used to assess Tilehurst Triangle's mix of uses. The figure below shows the area covered by Goad.



**Figure 55: Tilehurst Triangle Goad Coverage Map**



Source: Goad

214. The table below shows that Tilehurst Triangle has a total of 79 units and an overall quantum of 8,510 sqm in floorspace.

**Figure 56: Tilehurst Triangle Diversity of Uses, Outlets and Floorspace**

	No. of Outlets	% of Total Outlets		Gross Floorspace (sqm)	% of Total Floorspace	
		Tilehurst Triangle	UK Average		Tilehurst Triangle	UK Average
Comparison Retail	14	17.7%	26.3%	1,180	13.9%	29.2%
Convenience Retail	8	10.1%	9.3%	1,890	22.2%	15.6%
Retail Services	26	32.9%	16.0%	2,150	25.3%	7.4%
Leisure Services	16	20.3%	25.8%	2,060	24.2%	26.7%
Financial & Business Services	9	11.4%	8.3%	690	8.1%	6.2%
Vacant	6	7.6%	14.1%	540	6.3%	14.3%
<b>Total</b>	<b>79</b>	<b>100.0%</b>	<b>100.0%</b>	<b>8,510</b>	<b>100.0%</b>	<b>100.0%</b>

Source: Goad

215. Retail services are the dominant use within the centre, covering almost one in three outlets. 15 of these 26 retail services are accounted for by health & beauty services. Comparison retail and leisure services are under-represented when comparing to the UK averages.
216. The provision of high street banks has been significantly hit in recent years, with Nationwide, NatWest and Lloyds Bank all closing down.

**Figure 57: Tilehurst Triangle Food & Beverage, Outlets and Floorspace**

	No. of Outlets	% of Total Outlets		Gross Floorspace (sqm)	% of Total Floorspace	
		Tilehurst Triangle	UK Average		Tilehurst Triangle	UK Average
Bars & Wine Bars	0	0.0%	2.3%	0	0.0%	2.4%
Cafes	3	3.8%	5.2%	490	5.8%	2.9%
Fast Food & Take-Away	6	7.6%	6.1%	500	5.9%	3.1%
Public Houses	3	3.8%	2.6%	640	7.5%	3.4%
Restaurants	3	3.8%	5.1%	260	3.1%	4.3%
<b>Total</b>	<b>15</b>	<b>19.0%</b>	<b>21.3%</b>	<b>1,890</b>	<b>22.2%</b>	<b>16.1%</b>

Source: Goad

217. Overall, the provision of food & beverage units within the centre is broadly in line with the UK average (19% vs 21.2%). The most common food & beverage operator type is fast food & takeaway (6 of the 15 outlets).

### Vacancies

218. There are a total of 6 vacant outlets in Tilehurst Triangle which represents 7.6% of the overall outlets (lower than the UK average of 14.1%). 6.3% of the floorspace in Tilehurst Triangle is vacant.
219. The image below illustrates where vacant units are located in Tilehurst Triangle as of May 2024. As can be seen, these vacancies are spread across the centre, with no obvious clusters present.

**Figure 58: Tilehurst Triangle Vacancies Map**



Source: Goad

## Multiple and Independent Representation

220. National multiples allow a centre to draw shoppers from beyond its immediate catchment as people search for their nearest store and are willing to travel further for brands such as John Lewis and M&S. Tilehurst has a select number of national multiples including The Co-operative Food and Domino's.
221. Independent retailers are essential to create a unique and local feel to a centre. They help to curate a sense of place and pride within an area for those who live nearby. Tilehurst Triangle has a range of independent outlets, including Mad Hatters Pottery Painting & Coffee Shop, The Village Florist and Warings Bakery.

## Retailer Requirements

222. Demand from retailers and leisure operators for representation in a centre is an important indicator of a centre's overall health and viability. The latest published market demand report is set out in the table below.

**Figure 59: Retailer Requirements, Tilehurst**

Recorded Date	Operator	Sector	Min Sqm	Max Sqm
Apr 24	Lidl	Convenience Retail	1,700	2,400
		<b>Total</b>	<b>1,700</b>	<b>2,400</b>

Source: The Requirement List

223. As of October 2024, a review of published operator requirements identified one recorded requirement from retail and leisure operators in the last 12 months, seeking a maximum floorspace of up to 2,400 sqm.
224. It should be noted that Lidl may not necessarily be seeking representation within the centre itself but potentially out-of-centre locations and retail parks.
225. It is also possible that Lidl are not looking for opportunities in Tilehurst specifically, rather they are looking for opportunities in areas similar to and including Tilehurst.
226. Independent/ smaller operators do not tend to document their desire for retail space in the same way as the larger national multiples and fast-growing organisations, and so gauging the demand for retail space from these businesses is harder.

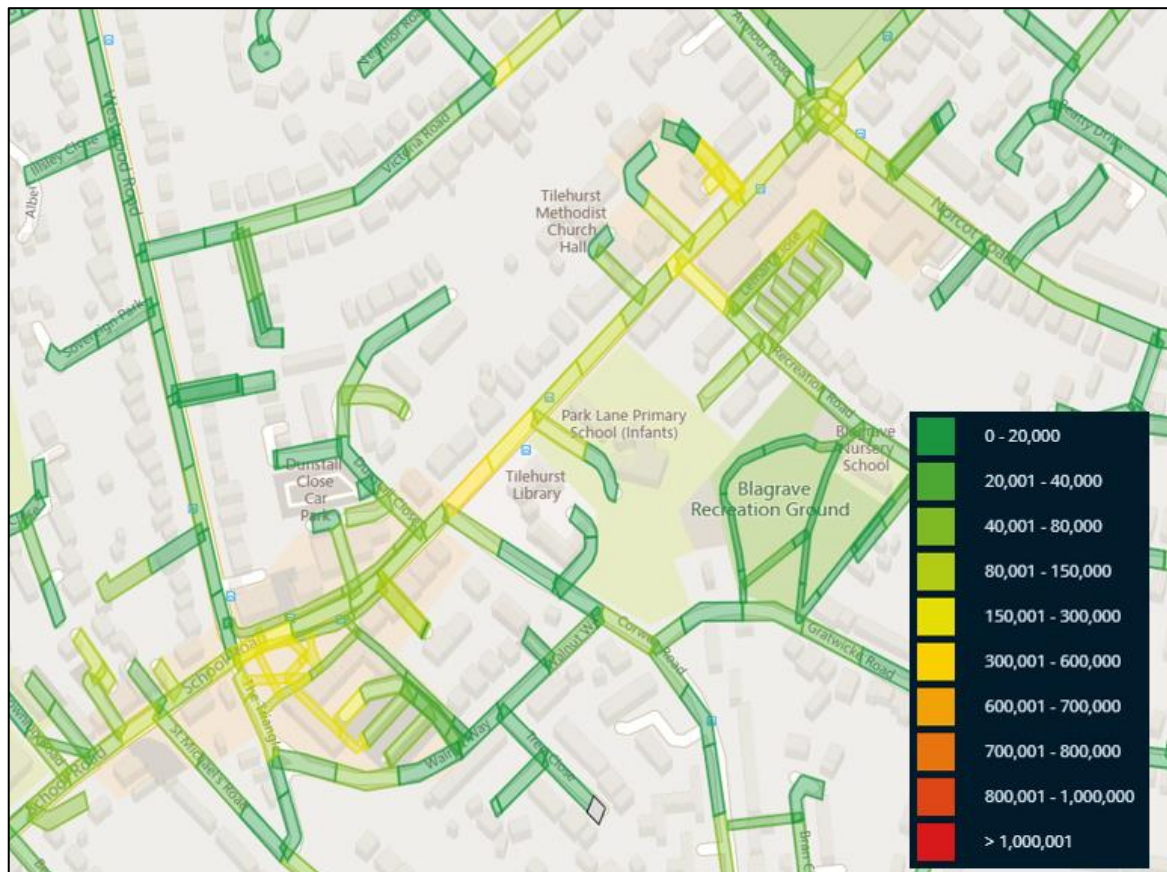
## Commercial Rents and Yields

227. A broad estimate of prime Zone A rental tone within Tilehurst Triangle would indicate a rental level in the region of £325/sqm (£30/sqft) – £375/sqm (£35/sqft).
228. Due to a lack of sales transactions data on investment, yields cannot be identified.

## Pedestrian Flows

229. The figure below illustrates the pedestrian flows for Tilehurst Triangle in the form of a heat map showing total pedestrian movements for September 2024. It shows that pedestrian activity peaks to the south west (just east of the Westwood Road/ School Road junction), middle (by the library and primary school) and north east (by the Post Office) of the centre.

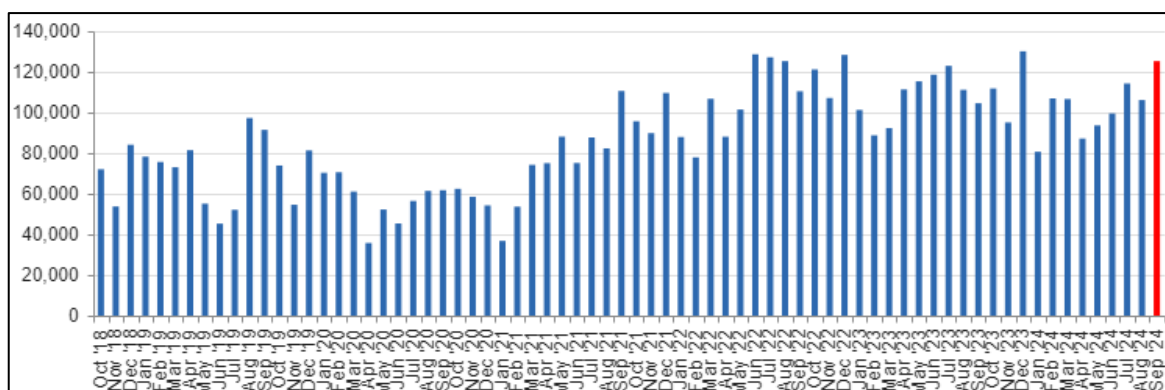
**Figure 60: Tilehurst Triangle Footfall Heat Map, September 2024**



Source: MSC1

230. A section to the north east of Tilehurst Triangle was sampled (near to the petrol station) to obtain information on how footfall levels have changed between October 2018 and September 2024.
231. As can be seen in the figure below, footfall levels have grown strongly in recent years, going from monthly figures that were regularly below 80,000 to figures that on occasion surpass 120,000.

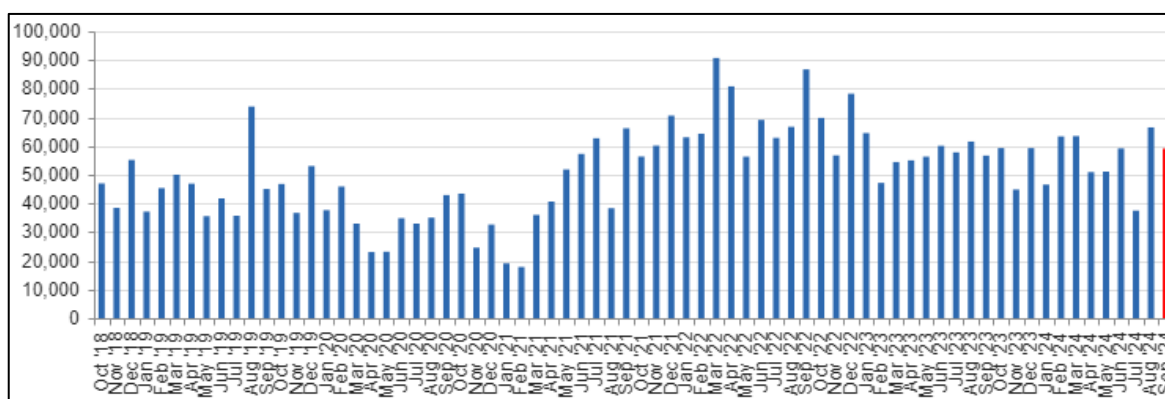
**Figure 61: Monthly Footfall Graph, October 2018 - September 2024, North-East Tilehurst Triangle**



Source: MSCI

232. A section to the south west of Tilehurst Triangle (nearby to the Tilehurst War Memorial) was also sampled to obtain information on how footfall levels have changed between October 2018 and September 2024.
233. As can be seen in the figure below, footfall levels have notably grown during this period, with 2022 seeing the peak figures (March, April, September and December).

**Figure 62: Monthly Footfall Graph, October 2018 - September 2024, South-West Tilehurst Triangle**



Source: MSCI

## Accessibility

234. Bus routes can be picked up along School Road and provide connections into Reading as well as to Oxford Road West district centre, Tilehurst train station and Meadway district centre.
235. Car parking in the area can be found at:
- The Triangle car park (66 spaces)
  - Dunstall Close car park (50 spaces)
  - Recreation Road car park (84 spaces)

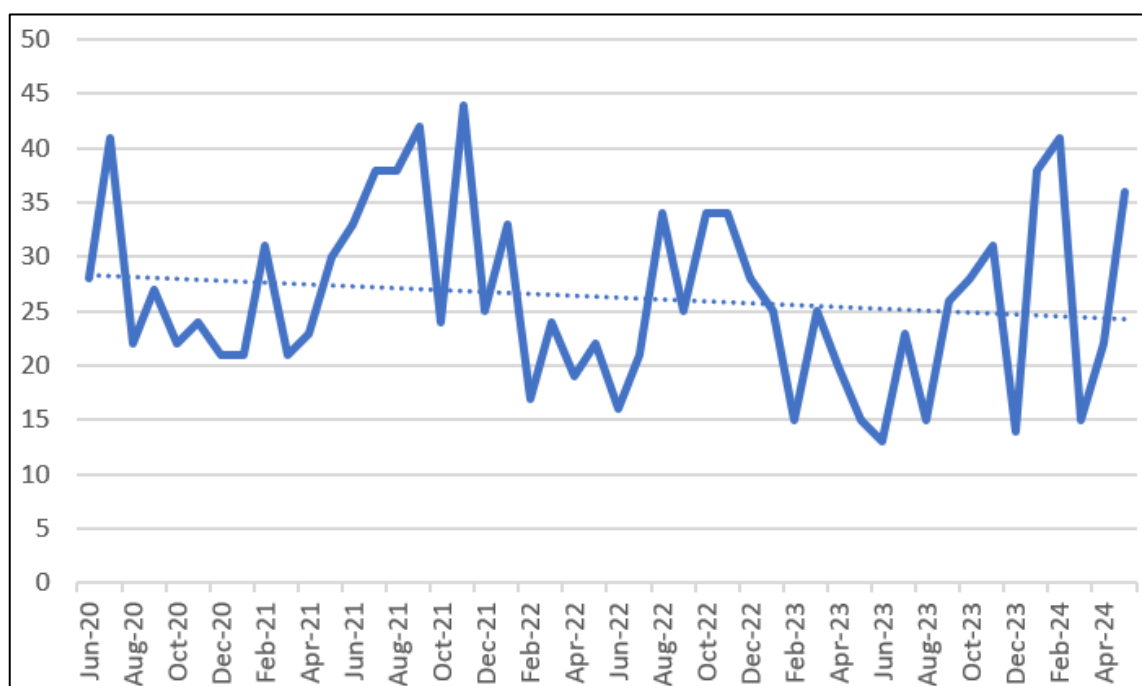


236. A mixture of pedestrian traffic light crossings, zebra crossings and pedestrian islands are located along School Road to support those navigating the centre on foot. Cycle parking is provided to support those travelling to and from the centre by bike.

## Crime and Safety

237. A central postcode within Tilehurst Triangle was used to review total crime data within a ¼ mile radius between June 2020 and May 2024. The figure below outlines the total crime rate month by month within this period, as well as a trendline to show the overall change in criminal activity over the four years.
238. As can be seen, recorded crime levels have fluctuated during over this time, with highs of over 40 crimes per month and lows of around 15. The trendline indicates a decline in overall criminal activity during this period.

**Figure 63: Tilehurst Triangle Recorded Crimes, June 2020 - May 2024**



Source: UKCrimeStats

239. The top three types of crimes recorded within this area during this period are shoplifting (410 recorded incidences), violence & sexual offences (272 recorded incidences) and public order offences (128 recorded incidences).

## Evening and Night Time Economy

240. A sample of leisure outlets within Tilehurst Triangle have been selected with their opening times and more importantly closing times recorded to get a sense of the provision of the evening offer.

241. As outlined below, the offer within the centre includes a few pubs as well as a couple of restaurants. All remain open until late, whilst both of the Co-op stores in the centre are open until 10pm.

**Figure 64: Leisure Operator Sample**

Retailer Name	Type	Open	Close
The Prince	Pub	11am	11pm
The Plough	Pub	12pm	11pm
The Victoria	Pub	12pm	10-11:30pm
Himalayan Hot Spot (Nepalese)	Restaurant	5-5:30pm	10pm
Vesuvio Pizzeria (Mediterranean)	Restaurant	10am	9-11pm

## Conclusion

242. Overall, the Strengths, Weaknesses, Opportunities, Threats (SWOT) can be summarised as follows:

### Strengths

- Strong retail services offer.
- Low vacancy rate.
- Growth in footfall in recent years.
- Good provision of car parks across the centre.
- Decline in recorded levels of crime in recent years.

### Weaknesses

- Disconnect between the main areas of the centre (north east and south west).
- Limited comparison retail offer.
- Closure of several high street banks in recent years.

### Opportunities

- Improvements made to shop frontages to boost the environmental quality of the centre, particularly the parade of units by the Tilehurst War Memorial.
- Vacant units left behind by high street banks to be reoccupied by new operators that boost the mix of uses within the centre.

### Threats

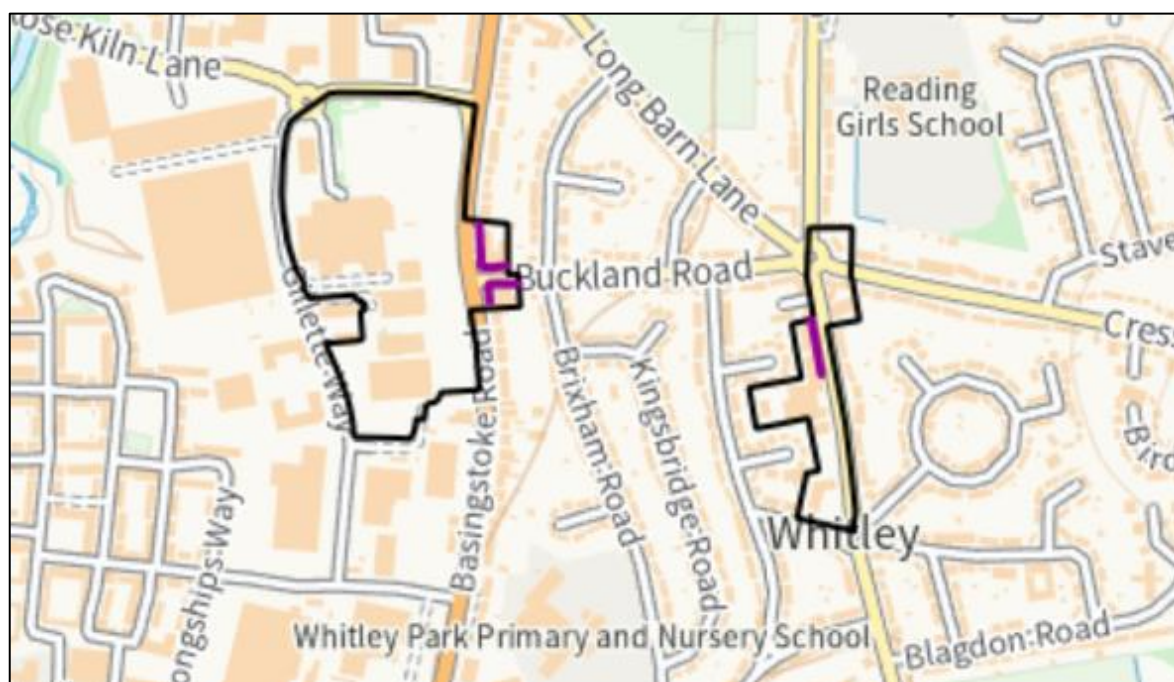
- High/ increasing business operating costs.

## 10. Whitley District Centre Health Check

### Overview

243. As outlined within the Reading Borough Council Local Plan (adopted November 2019), Whitley is designated as a district centre. The centre is split into two sections – one to the east (Basingstoke Road, covering Morrisons and Aldi) and one to the west (Northumberland Avenue).
244. The key frontages (marked in purple within the figure below) make up a small proportion of the centre as a whole and can be found at the Basingstoke Road/Buckland Road junction and along on the western side of Northumberland Avenue.
245. Typically, the PSA is used to differentiate the core retail area from a wider town centre boundary. Whitley is unusual in that the centre boundary comprises two separate areas that serve different centre functions. For example, the area of Whitley that includes commercial frontages off Basingstoke Road and the adjacent retail park are likely to attract a wider customer catchment due to the presence of Morrisons, Aldi and other national chains (e.g. Runners World). In contrast, the area of Whitley that comprises units on Northumberland Avenue will mainly serve a local catchment. If a PSA is to be considered, then for the Whitley West this should comprise the parade of units on Basingstoke Road and Buckland Road where primary shopping frontages are defined. Within Whiteley East, the PSA should be focused on the existing primary shopping frontage given the extent of non-commercial uses within the rest of this part of the centre.

**Figure 65: Whitley District Centre**



Source: Reading Borough Council Local Plan Proposals Map

## Diversity of Uses

246. The western section of Whitley district centre is characterised by large format units to the west of Basingstoke Road, and smaller parades of units to the east. The uses and operators include:
- Comparison retail – Cotswold Outdoor (outdoor clothing and equipment shop) and Allsorts of Pets (pet shop)
  - Convenience retail – Morrisons (approximately 8,380 sqm), Aldi (approximately 1,070 sqm) and Reading Chronicle (newsagents)
  - Retail services – Harmony Nails & Beauty, Launderette and Dry Cleaning and Top Cut (barber shop)
  - Leisure services – The Victoria Cross (pub), PureGym, Ladbrokes (betting shop), Minas Café and New City Fish Bar
247. The eastern section of the centre has a more limited offer, which includes convenience retail (Premier and Good One Supermarket) and leisure services (Betfred (betting shop), Turkish Mangal (fast food & take-away), Golden Dragon (Chinese takeaway) and Eastern Vegan (Asian takeaway).

## Vacancies

248. There are a limited number of vacancies within the centre. The corner unit to the north east of the Basingstoke Road/Buckland Road junction is currently vacant, as is the former Motorists' Discount Centre unit further south.

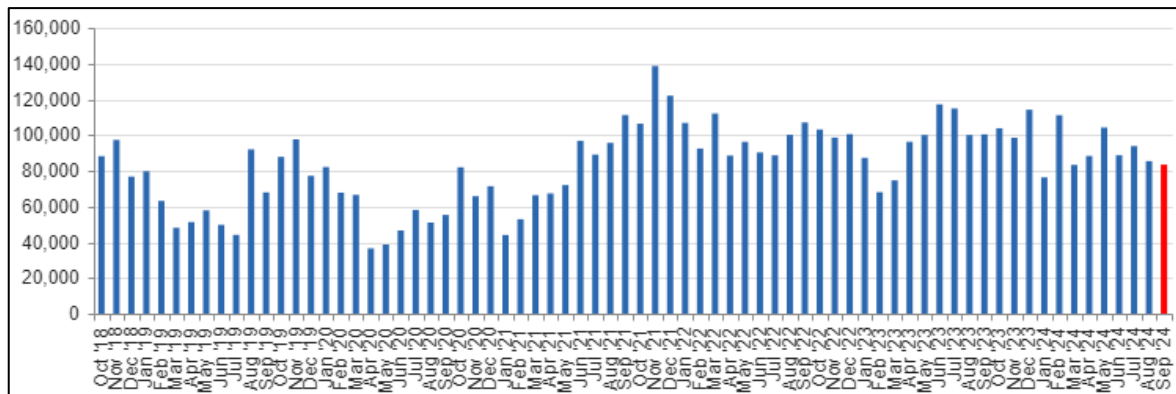
## Multiple and Independent Representation

249. National multiples allow a centre to draw shoppers from beyond its immediate catchment as people search for their nearest store and are willing to travel further for brands such as John Lewis and M&S. Whitley district centre has a select range of national multiples including Morrisons, Aldi, Cotswold Outdoor and PureGym.
250. Independent retailers are essential to create a unique and local feel to a centre. They help to curate a sense of place and pride within an area for those who live nearby. Whitley district centre has a select range of independent outlets, including Minas Café and Allsorts of Pets.

## Pedestrian Flows

251. A section of the western part of Whitley, located at the Basingstoke Road/ Buckland Road Junction, was sampled to obtain information on how footfall levels have changed between October 2018 and September 2024.
252. As can be seen in the figure below, pedestrian activity grew significantly throughout 2021 and has now stabilised at a level higher than seen pre-pandemic.

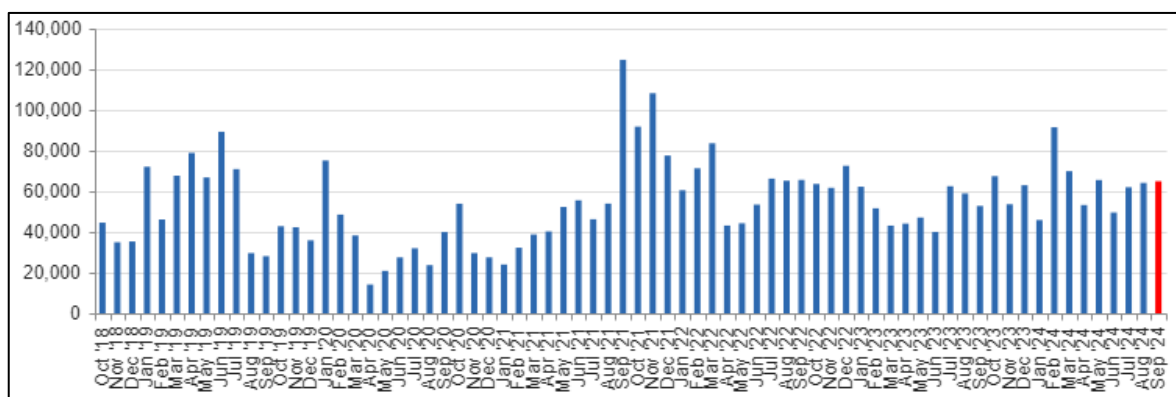
**Figure 66: Monthly Footfall Graph, October 2018 - September 2024, Basingstoke Road/ Buckland Road Junction**



Source: MSCI

253. A section of the eastern part of Whitley, located along Northumberland Avenue, was sampled to obtain information on how footfall levels have changed between October 2018 and September 2024.
254. As can be seen in the figure below, late 2021 (September to November) represents the peak period, whilst figures have now stabilised at around 60,000 per month.

**Figure 67: Monthly Footfall Graph, October 2018 - September 2024, Northumberland Road**



Source: MSCI

## Accessibility

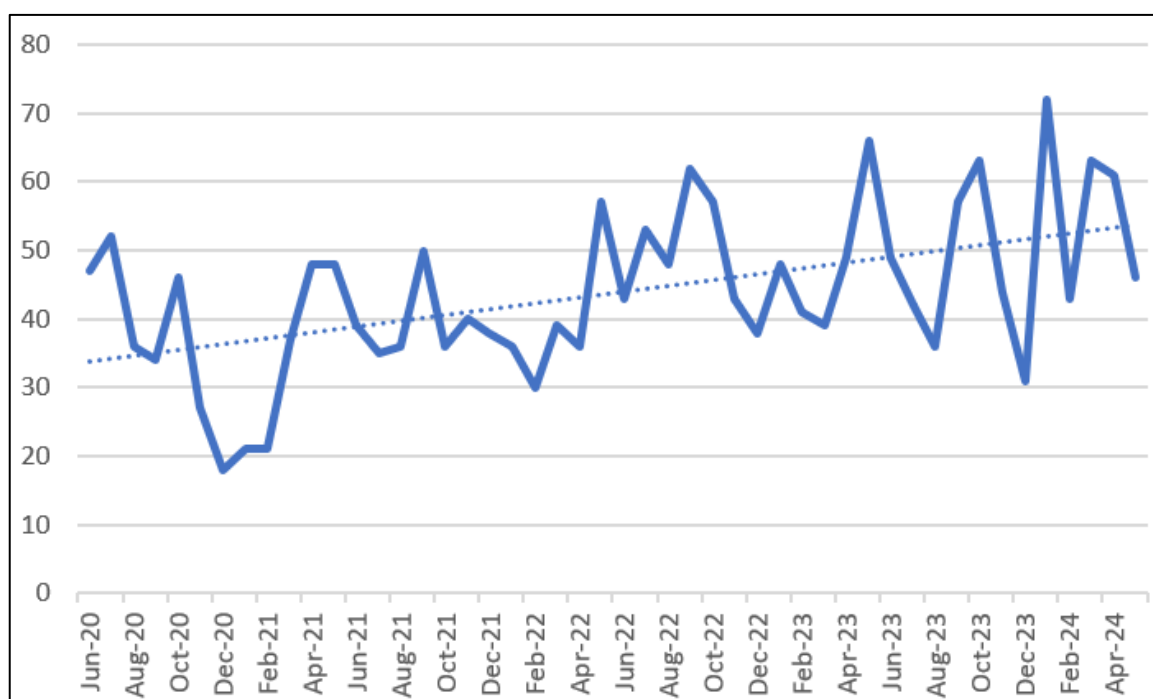
255. Bus routes connecting into Reading can be picked up in both parts of the centre. Road networks allow for connections to and from Reading (to the north) and the M4 (to the south) (which leads to London to the east and Bristol to the east). Large car parks can be found accompanying the large format units to the west of the centre while on-street parking can be found across other parts of the centre. A pedestrian traffic light crossing on Basingstoke Road supports navigation for those on foot, although several lanes of regular traffic does pose a challenge to the accessibility of the centre for pedestrians. Cycle parking is available within the centre.



## Crime and Safety

256. A central postcode within Whitley was used to review total crime data within a ¼ mile radius between June 2020 and May 2024. The figure below outlines the total crime rate month by month within this period, as well as a trendline to show the overall change in criminal activity over the four years.
257. As can be seen, recorded crime levels have grown during this period, with January 2024 representing the peak month.

**Figure 68: Whitley Recorded Crime, June 2020 – May 2024**



Source: UKCrimeStats

258. The top three types of crimes recorded within this area during this period are violence & sexual offences (635 recorded incidences), other theft (302 recorded incidences) and shoplifting (223 recorded incidences).

## Evening and Night Time Economy

259. There is a limited provision of evening establishments within the centre. The Victoria Cross (pub) is open until 11pm every day. Several takeaways are located within the centre however these may not necessarily be driving genuine visitor footfall due to the delivery nature of their service. Aldi remains open until 10pm (except on Sundays) whilst Morrisons closes at 11pm (again, expect for Sundays).

## Conclusion

260. Overall, the Strengths, Weaknesses, Opportunities, Threats (SWOT) can be summarised as follows:

### Strengths

- Range of unit sizes, allowing for a mix of national multiples and independent retailers.
- Strong presence of convenience retail space which is occupied by major convenience retail brands.
- Low number of vacant units across both parts of the centre.
- Signs of footfall growth in both sections of the centre.
- Bus routes to and from Reading.
- Good mix of parking provision.

### Weaknesses

- A lack of cohesion to the centre due to the split sections.
- Growing levels of recorded criminal activity.
- Limited evening economy and related leisure operators.

### Opportunities

- Tackle rising levels of crime to avoid any potential impacts on centre perception.
- Improvements made to shop frontages to boost the environmental quality of the centre.

### Threats

- High/ increasing business operating costs.
- Increased through traffic.
- Rising crime leading to a reduction in visitor numbers.