



Brent Retail & Town Centres Evidence Base:

Brent Retail & Leisure Study 2018 (Document A) Volume 1 - Main Report

October 2018



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Provided separately:

Document A, Volume 2 (Study area & market share plans)

Document A, Volume 3 (Appendices)

Document A, Volume 4 (Household survey results – NEMS Market Research)

Document A, Volume 5 (Duty to Co-Operate Statement)

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1 | Introduction



1. Introduction

- 1.1 **Urban Shape and Regeneris** have been instructed by Brent Council to prepare evidence in respect of the future retail and commercial leisure needs for the Borough, to inform the preparation of the Council's new Local Plan. Our evidence is set out across three documents, which when combined form the council's retail and town centres evidence base.
- This document – the **Brent Retail & Leisure Study 2018** – provides a quantitative and qualitative assessment of the future retail and commercial leisure needs which the Borough will need to plan for in its new Local Plan. We refer to this document as **Document A**.
 - The findings of this document should be read alongside the **Brent Town Centre Health Checks Study** which forms **Document B** of the retail and town centres evidence base. This sets out the current performance of the Borough's network of town, district and local centres, identifying strengths and weaknesses of the existing offer and assessing their current levels of vitality and viability.
 - The findings of Documents A and B are then used to inform the **Brent Retail & Leisure Strategy paper**, which forms **Document C** to the evidence base. The Strategy delivers a series of borough-wide and area-specific recommendations which the Council can take forward to inform the preparation of its emerging Local Plan and other development plan documents.
- 1.2 The study aims to support the Council's strategic planning functions, and in particular to provide evidence for the Council's new Local Plan, which will guide future development in the Borough over the period to 2041, as well as provide strategic advice on the future role and function of Brent's town centres. The study updates the Council's previous evidence base in respect of retail and town centres, prepared by Roger Tym & Partners and published in 2008. We refer to this throughout this report as 'the 2008 Study'.

Structure of report (Document A)

- 1.3 The Brent Retail & Leisure Study 2018 (Document A) is presented across four volumes, with this report forming Volume 1 of the study. Volume 2 presents accompanying mapping and plans; Volume 3 supporting technical appendices; and Volume 4 provides the results of the household telephone survey undertaken in support of the study (discussed further below). An Executive Summary of our study has also been produced.
- 1.4 The remainder of this report (Volume 1) is structured as follows:
- The remainder of this section identifies the evidence we have used to inform the preparation of our study, and provides a brief summary of the national, regional and local planning context within which this study has been prepared.
 - **Section 2** discusses the current market trends in the retail and commercial leisure sectors, providing important context for the remainder of the study. It considers, inter alia, the potential impacts of the UK's decision to leave the EU on consumer spending; how patterns of online shopping have changed since the 2008 Study and future growth in this area; the increasing role of commercial leisure in shaping successful town centres; and the evolving nature of the convenience goods sector.
 - **Section 3** identifies the most popular destinations for comparison goods shopping for residents in Brent. It reviews the current retail and leisure offer in the key 'competing centres' which surround the Borough, identifies planned developments which may alter these



locations' attractiveness as shopping and leisure destinations over the course of the study period, and identifies the catchment area of each competing centre from the study area.

- **Section 4** presents an overview of the network of centres in Brent, drawing on the findings of the Town Centre Health Checks Study (**Document B**) in parallel to the preparation of this study.
- **Section 5** considers the shopping patterns of the residents across the survey area in detail, identifying the most popular locations for comparison (non-food) and convenience (food) goods shopping, as well as patterns of specialist ethnic food and non-food retailing, and visits to markets.
- **Section 6** sets out the quantitative need for new comparison and convenience goods retail across the Borough to 2028, as well as indicative longer-term projections to 2041.
- **Section 7** provides an assessment of commercial leisure provision in the Borough, drawing on the findings of the household survey, and provides a quantitative assessment of the need for class A3 and class A4 floorspace, and a qualitative assessment of the need for other commercial leisure floorspace and 'main town centre uses'.
- **Section 8** sets out a summary of key findings.

Evidence

1.5 Our study has been informed by a mixture of on-site and desk-based information gathering, including site visits to the Borough's two major centres (Kilburn and Wembley) and its network of district centres (Burnt Oak, Colindale, Cricklewood, Ealing Road, Harlesden, Kenton, Kingsbury, Neasden, Preston Road, Wembley Park and Willesden Green) and local centres (Church End, Kensal Rise, Queen's Park and Sudbury).

1.6 We have also had regard to a wide range of secondary data sources, including forecasts of population and expenditure, as well as expenditure growth rates and 'special forms of trading' (e.g. online shopping) estimates provided by Experian; the Greater London Authority's Town Centre Health Check database and ward-based population projections; and foodstore operator sales densities provided by Mintel.

Household telephone survey

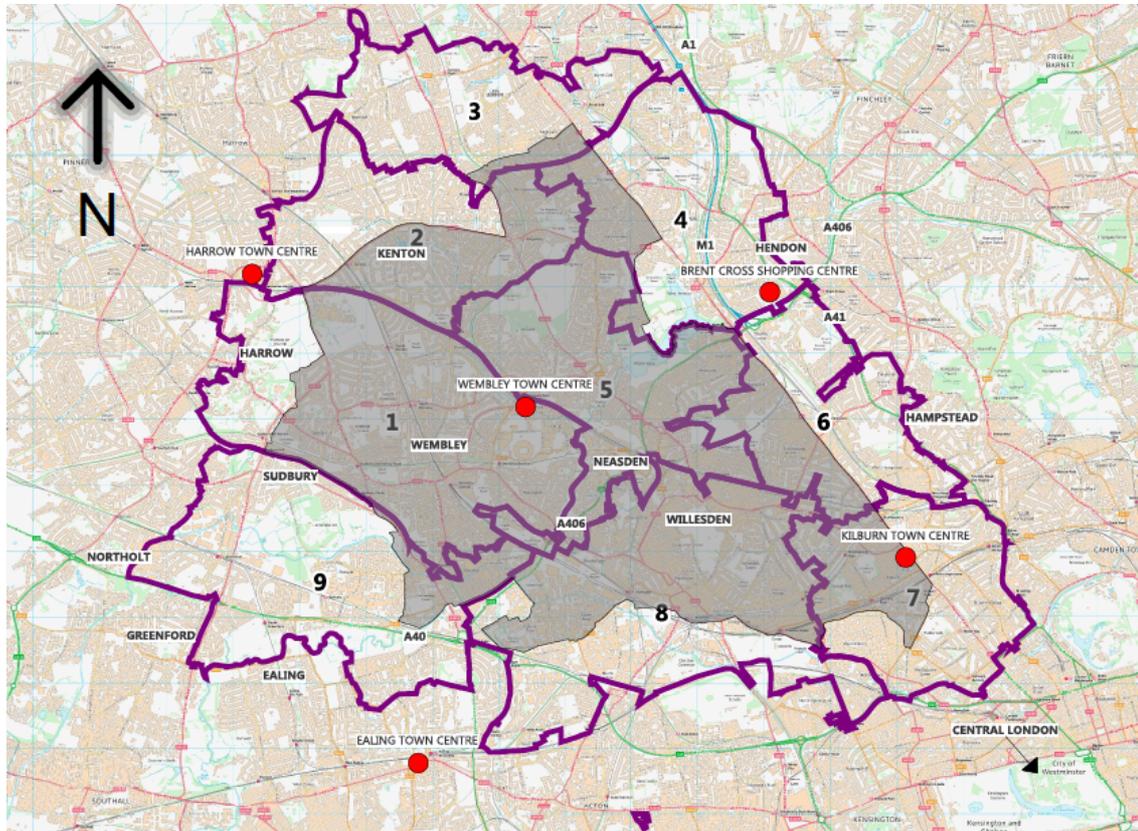
1.7 Further evidence is provided by way of a household telephone survey of shopping and leisure patterns across the Borough, as well as adjacent surrounding areas where residents may look towards facilities in the Borough to meet their shopping and leisure needs. This is referred to throughout the report as the 'survey area'. The household telephone survey was undertaken by NEMS Market Research in January/February 2018. The survey questionnaire and format was agreed with the Council, and the survey area was also circulated to neighbouring authorities under Duty to Co-Operate for comment.

1.8 The results of the survey area show the extent to which centres surrounding the Borough are competing for expenditure with the network of centres in Brent. Importantly, the survey findings also enable a clear picture of the influence of Westfield London over the shopping patterns of residents in the Borough to be understood; at the time of the previous equivalent survey of shopping patterns in the Borough (in 2007), this development had not yet opened.



- 1.9 The household survey area is shown in **Figure 1.1**¹. This shows the survey area covers Brent (shaded grey in Figure 1.1) in its entirety, plus a concentric buffer extending into neighbouring authority areas.

Figure 1.1 | Household telephone survey area



- 1.10 As can be seen from Figure 1.1, the survey area is sub-divided into nine survey zones (defined by postcode sectors), to enable patterns of shopping and leisure visits to be accurately captured at the local level. Both the overall boundaries of the survey area, and the sub-division into survey zones², are unchanged from the 2008 Study, enabling analysis of changes in shopping and leisure patterns to be robustly analysed.
- 1.11 The split of major, district and local centres within Brent across the survey zones is shown in **Table 1.1** (overleaf). Although zone 9 forms part of the survey area, it does not contain any centres which fall within Brent. Also of note is the large concentration of retailing in the Brent Cross/Staples Corner area, which is not a defined centre but nevertheless is a major comparison goods shopping destination, which falls within zone 4. This includes Brent Cross Shopping Centre, Brent South Shopping Park, and Staples Corner Retail Park. Brent Cross/Staples Corner falls within the administrative area of LB Barnet.

¹ A larger version of the survey area plan is provided in Volume 2.

² There are a number of minor changes to the survey zone boundaries on account of changes of boundaries of individual postcode sectors from which the survey zones are defined.



Table 1.1 | Survey zones and locations of Brent centres

Zone number	Zone name	Major centres (LB Brent)	District centres (LB Brent)	Local centres (LB Brent)	Other major retail locations
1	Wembley	Wembley	Ealing Road; Wembley Park	Sudbury	
2	Kenton & Kingsbury	-	Kenton; Kingsbury; Preston Road	-	
3	Burnt Oak	-	Burnt Oak	-	
4	Colindale	-	Colindale	-	Brent Cross Shopping Centre; Brent Cross/ Staples Corner Retail Parks*
5	Neasden	-	Neasden	-	
6	Cricklewood	-	Cricklewood	-	
7	Kilburn	Kilburn	-	Queen’s Park	
8	Harlesden & Willesden	-	Harlesden; Willesden Green	Church End; Kensal Rise	-
9	Greenford	-	-	-	Westway Cross Retail Park*

**retail destinations which fall within survey area but outside Brent*

The national planning policy context

National Planning Policy Framework (NPPF) (2012, revised 2018)

- 1.12 The National Planning Policy Framework (NPPF), published in March 2012, sets out the Government’s planning policies for England and replaces the suite of national Planning Policy Statements, Planning Policy Guidance and Circulars with a single document. A revised, updated NPPF was published by Government in July 2018, with a focus on improving the delivery of high quality, well-designed homes in the areas where people want to live.
- 1.13 The NPPF advocates a ‘town centres first’ approach, and requires planning policies to positively promote competitive town centre environments and manage the growth of centres over the plan period. In planning for town centres LPAs should:
- Recognise town centres as the heart of their communities and pursue policies to support their viability and vitality;
 - Define a network and hierarchy of centres that is resilient to anticipated future economic changes;
 - Define the extent of town centres and primary shopping areas, based on a clear definition of primary and secondary shopping frontages in designated centres and set policies that make clear which uses will be permitted in such locations;
 - Promote competitive town centres that provide customer choice and a diverse retail offer which reflect the individuality of town centres;



- Retain and enhance existing markets and, where appropriate, re-introduce or create new ones, ensuring that markets remain attractive and competitive;
- Allocate a range of suitable sites to meet the scale and type of economic development needed in town centres. Where town centre sites are not available, LPAs should adopt a sequential approach to allocate appropriate edge of centre sites;
- Set policies for the consideration of proposals for main town centre uses which cannot be accommodated in or adjacent to town centres;
- Recognise that residential development can play an important role in ensuring the vitality of centres; and
- Where town centres are in decline, plan positively for their future to encourage economic activity.

1.14 LPAs should ensure that the Local Plan is based on adequate, up-to-date and relevant evidence about the economic, social and environmental characteristics and prospects of the area. These assessments should be integrated and take full account of relevant market and economic signals. In order to be considered 'sound', Local Plans should be positively prepared, justified, deliverable and consistent with national policy. The NPPF is a material consideration in planning decisions.

Planning Practice Guidance (PPG) (2014)

1.15 In March 2014 the Department for Communities and Local Government (DCLG) launched online Planning Practice Guidance (PPG), which cancelled a number of previous planning practice guidance documents, including the Practice Guidance on Need, Impact and the Sequential Approach (2009). Although it does not constitute a statement of Government policy, it provides technical guidance on how to prepare a robust evidence base and how to assess the impact of proposals for main town centre uses. The web-based resource also provides guidance on how to assess and plan to meet the needs of main town centre uses in full through production of a positive vision or strategy for town centres.

The regional planning context – Draft London Plan (2017)

1.16 The Mayor of London published the Draft London Plan (DLP) for consultation in December 2017. The DLP, as the overall strategic plan for London, sets out the economic, environmental, transport and social framework for the development of London over the next 20-25 years. This strategic framework in turn guides boroughs' development plans, to ensure that the Mayor and Boroughs are 'working towards a shared vision for London'.

Good Growth and Opportunity Areas

1.17 The concept of Good Growth – growth that is socially and economically inclusive and environmentally sustainable – underpins the DLP and ensures that it is focused on delivering sustainable development.

1.18 The DLP identifies a total of 47 'Ongoing Opportunity Areas' across Greater London, including three which fall wholly or partly within Brent -- Wembley, Burnt Oak/Colindale and Brent Cross/Cricklewood. A fourth – Old Oak and Park Royal – where a Mayoral Development Corporation is the local planning authority, covers parts of Brent, Ealing and Hammersmith and Fulham. It sits immediately to the south west of the Borough and offers potential for parts of Brent to benefit from the development which will occur here. The DLP states that the Opportunity Areas have potential to deliver a 'substantial number' of the new homes and jobs which London needs.



The role of town centres

- 1.19 Policy SD6 of the DLP sets out the Mayor's approach to town centres across London, with the DLP making it clear that town centres will continue to be promoted and enhance as *'strong, resilient, accessible, inclusive and viable hubs for a diverse range of uses including employment, business space, shopping, culture, leisure, night time economy, tourism, civic, community, social infrastructure and residential development.'* The DLP acknowledges that in order to continue to thrive, town centres will need to *'evolve and change in response to current and future economic trends, technological advances, and the development of the 24-hour city'*.
- 1.20 Policy SD6 places particular emphasis on sites within and on the edges of town centres to accommodate higher-density residential and mixed use development. It adds that residential-only schemes in town centres *'may be appropriate outside of primary and secondary shopping frontages where it can be demonstrated that they would not undermine local character and the diverse range of uses required to make a town centre vibrant and viable'*. Residential uses can enhance the commercial role of a town centre, increasing footfall to support retail, leisure, and the growth of an evening / night-time economy.

Town centre network

- 1.21 Policy SD7 of the DLP sets out the approach to the management of the town centre network across Greater London, and is supported by a classification of each centre in the town centre hierarchy at Appendix 1. The hierarchy of centres is headed by two 'International' centres (West End, Knightsbridge) and 14 Metropolitan Centres, followed by 'Major' and 'District' Centres, and locations which fall within CAZ Retail Frontage.
- 1.22 International, Metropolitan and Major Centres should be the focus for higher-order comparison goods retailing; district centres should focus on the 'consolidation of a viable range of functions', particularly convenience goods retailing, leisure, local employment and workspace. District centres should also 'address the choice of new forms of retailing and securing opportunities to realise their potential for higher-density mixed use residential development and improvements to their environment'.
- 1.23 The following centres in Brent are identified in the DLP centre hierarchy³:
- **'Major' centres** - Wembley and Kilburn (Kilburn is split between Brent and Camden)
 - **'District' centres** - Ealing Road, Harlesden, Neasden, Preston Road, Wembley Park, Willesden Green, Kingsbury (Brent/Harrow), Kenton (Brent/Harrow), Colindale/The Hyde (Brent/Barnet), Cricklewood (Brent/Barnet/Camden) and Burnt Oak (Brent/Barnet/Harrow).
- 1.24 The DLP identifies a number of potential changes to the town centre network⁴. No changes are proposed for Brent's centres, but Brent Cross - immediately adjacent to the Borough's eastern boundary - is identified as a potential future Metropolitan centre, following the proposed works to create a new town centre (discussed in the following section).
- 1.25 To the south of the Borough, Old Oak is defined as a potential Major centre in the DLP. The development of Old Oak and the surrounding area is led by the Old Oak and Park Royal Development Corporation (OPDC), established by the Mayor of London in 2015. Old Oak and Park Royal is identified as an Opportunity Area on account of the development potential generated by being the only location where Crossrail and the proposed High Speed 2 rail lines will intersect. The OPDC is responsible for all planning functions and decisions on planning applications for its area, including

³ The DLP does not identify local centres in its retail hierarchy.

⁴ The classification of International, Metropolitan and Major town centres can only be changed through the London Plan. Changes to District, Local and Neighbourhood centres can be brought forward through Local Plans where supported by evidence in development capacity assessments and town centre health checks



preparation of a Local Plan. Further discussion of the OPDC and the future role of Old Oak is provided in Section 3 of our report.

Development principles

- 1.26 The London Plan takes a strong town centres first approach, confirmed under Policy SD7, which reflects the approach of the NPPF in requiring applications for development not within a defined centre to demonstrate compliance with the sequential and impact tests. Policy SD7 also states that, inter alia,
- development plans should take a town centres approach by realising the potential of existing out of centre retail and leisure parks to deliver housing intensification through redevelopment (whilst not delivering a net increase in out-of-centre retail/leisure floorspace).
 - Identify centres that have particular scope to accommodate new commercial development and higher density housing.
 - identify sites suitable for intensification, which may include supermarket sites, surface car parks or edge of centre retail/leisure parks; town centre shopping frontages which are surplus to demand, and redevelopment of low-density town centre buildings which are not of heritage value.

Strategic Areas for Regeneration

- 1.27 Those parts of Greater London which fall within the 20% most deprived areas in England (based on the Index of Multiple Deprivation) are identified in the DLP as ‘Strategic Areas for Regeneration’. In a number of cases, Strategic Areas for Regeneration overlap with town centres - in Brent, centres which are identified as Strategic Areas for Regeneration are **Kilburn, Cricklewood, Burnt Oak, Harlesden, Neasden and Wembley Park**.

The existing evidence base

- 1.28 The 2008 Study identified that, in terms of where residents in the survey area were undertaking their comparison (non-food) goods shopping:
- 51.2% of total available comparison goods spend was retained in the survey area, although this retention rate was heavily influenced by the inclusion of Brent Cross within the survey area.
 - Brent Cross accounted for 21.3% of total comparison goods spend available to the survey area (i.e. over £1 in every £5).
 - The two ‘major’ town centres of Wembley and Kilburn accounted for 5.6% and 4.1% of available comparison goods spend respectively.
 - 48.8% of comparison goods expenditure was spent in locations outside the survey area, with the most popular locations being Central London (13.3% of comparison goods spend) and Harrow (10.7%).
- 1.29 In terms of convenience (food) shopping, the 2008 Study identified that:
- 78.2% of available convenience goods spend was retained in the survey area, reflecting the fact that shopping for food goods is generally a more localised activity.
 - Asda stores in Colindale (Capitol Park) and Wembley (Forty Lane) attracted the highest convenience goods ‘market shares’ from across the survey area.
 - On aggregate, foodstores across the Borough were ‘over-trading’ by £73.9m. The Asda stores in Colindale and Wembley, together with the Sainsbury’s store in Willesden Green, were



found to be over-trading at a 'high level'. The Sainsbury's store in Kenton and Morrisons in Queensbury were found to be over-trading at more moderate levels.

- The Tesco store at Brent Park was found to be significantly 'under-trading', and the Study identified that the dated condition of the store and poor access from nearby residential areas, together with works being undertaken to the store at the time, were likely to all contribute to this.

1.30 The 2008 Study identified a positive requirement for additional comparison and convenience goods floorspace in the Borough:

- A requirement of between **56,100 and 90,000 sq.m (gross) comparison goods** floorspace was required over the period 2008-26. A range of floorspace scenarios were tested, including the retention rate for Brent decreasing (as a result of Westfield London) and increasing (as a result of extant commitments in Wembley).
- A requirement of up to **12,500 sq.m (gross) convenience goods** floorspace over the period 2008-26 was identified.

1.31 This study updates the above quantitative requirements in full.

Duty to Co-Operate & stakeholder consultation

1.32 The Council and Urban Shape has, under Duty to Co-Operate, engaged with a range of stakeholders as part of this study, include cross-departmental consultation with other relevant departments within Brent Council, discussions with neighbouring local planning authorities and the Greater London Authority, and key private sector stakeholders. The DTC consultation was led by Brent Council, with Urban Shape providing material for distribution, collating responses and integrating responses to the study where appropriate.

1.33 In particular, at the outset of the study we sought comment on the proposed methodology for the study, the household survey area, and invited submission of information on key planned developments in surrounding LPA areas. A summary of the approach and findings of the DTC exercise is provided at Volume 5 of this Document A study.

1.34 Further consultation was also undertaken in support of the Brent Town Centre Health Checks Study, gaging customer perceptions on the town centres in Brent which they visit for shopping and leisure. Further details of this are set out in the Town Centre Health Checks Study which forms Document B.



Retail & leisure market context



2. Retail & leisure market context

- 2.1 In this section, we set out the wider retail and leisure market context within which the study has been prepared, covering both the challenges and opportunities facing town centres at the present time. This covers a number of different strands – current and projected economic performance, online shopping, the changing role of the town centre and the increasing role of commercial leisure, and changing food shopping habits – but each of these strands should not be considered in isolation. The trends identified in this section inform the findings of the remainder of the study, and the development of its strategic recommendations. Where relevant, we make reference to local examples to demonstrate these impact of these sectoral changes at the local level in Brent.

Challenges for town centres

UK economic performance

- 2.2 The UK economy benefited from a strong upswing in the years following the recession which took place at the start of the decade, driven by increases in consumer spending and business investment. This upswing has now cooled, and growth forecasts for the short-term are noticeably more cautious. Experian's Retail Planner Briefing Note (RPBN) (December 2017) states that:

'Over the last year, the UK has shifted from being one of the fastest-growing G7 economies to among the slowest. The economic recovery has lost momentum due to a weaker performance from consumer spending and investment. Household incomes have suffered from the combination of higher inflation and sluggish wage growth. Alongside this, companies continued to hold back on investment decisions due to uncertainty over Brexit negotiations'.

Medium term outlook

- 2.3 Experian's Retail Planner Briefing Note also considers the medium and long-term economic prospects for the UK in light of its decision to leave the European Union, and translates these forecasts into expenditure growth projections for convenience (food) and comparison (non-food) goods.
- 2.4 Experian's medium and long-term forecasts are based on a number of high-level assumptions of the timing of the 'transition' period and the final trade deal with the EU, and anticipate adjusting their forecasts in future years once further details become available. Experian's 'baseline' forecasts assume that transitional trade deals will be struck by 2019, and final trade deals by 2021, allowing the economy to settle down in the period post-2023. Experian consider that the ongoing uncertainty over the UK's future relationship with the EU will leave the economy 'vulnerable'.
- 2.5 In the medium term, and having regard to the above assumptions, Experian forecast investment to rebound as uncertainty over the UK's Brexit deal becomes clearer and final trade deals are struck, but caution that that *'much will depend on the outcome of the trade negotiations and terminating involvement with the EU'*. During the negotiating phase, uncertainty is expected to constrain business confidence and investment plans.

Long term outlook

- 2.6 Experian state that the EU referendum vote has created 'major uncertainties' regarding the long term outlook for the UK economy, and its performance over the period post-2025 will depend on the terms of the new economic relationship between the EU and UK. Under Experian's 'baseline' forecasts, it is assumed that the UK will continue to have access to the single market, and under this assumption Experian suggest that overall consumer spending will increase at an average rate of 2.3% per head between 2025 and 2036.



Implications for the study

- 2.7 For the purposes of this study, we have assumed that the expenditure growth forecasts set out by Experian in their Retail Planner Briefing Note 15 (2017) will come forward, in absence of any indicators to the contrary. However, owing to the uncertainty described above, it is recommended that the quantitative findings of this study (i.e. the identified 'need' for new retail and commercial leisure floorspace) are kept under regular review throughout the Local Plan period.

Online shopping and new retail trends

- 2.8 Online shopping has become a firmly established method of shopping and presents both challenges and opportunities for the traditional town centre. Whilst still in its relative infancy at the time of the 2008 Study, it is now an intrinsic part of the retail sector, and the boundaries between physical retail and online retail are becoming increasingly blurred as a result of mobile and app-based shopping and quasi-retail trends such as 'click and collect'. Data from the ONS published in 2017⁵ shows the scale at which internet access and online shopping has evolved considerably since the 2008 Study. The ONS found that:
- 90% of households in Great Britain had internet access, compared to 57% in 2006. In London and the South East, the proportion of households with internet access rises to 94%;
 - Daily internet use has increased from 35% in 2006 to 80% in 2017;
 - 73% of adults accessed the internet using a mobile phone or smartphone, compared to 36% in 2011;
 - 77% of adults bought goods or services online, compared to 53% in 2008.
 - 89% of adults in the 25-34 age range buy online. Over a quarter of adults in this age range purchased more than 11 products online over a three month period, and a further 24% bought between 6 and 10 purchases online over a three month period;
 - The largest rise in adults buying online was the 55-64 age range, where 75% buy online - a rise of 30 percentage points since 2008.
 - 56% of adults purchase clothes or sports goods online, making these the most popular type of goods to be purchased online. This is followed by household goods (50%) and holiday accommodation (44%).
- 2.9 As noted above, the most popular type of goods to be purchased online is clothing and sports goods. The clothing and fashion sector has also historically been a principal driver of footfall on the high street, reflected in the fact that 'anchor' stores in larger town centres are typically fashion or department stores such as Marks & Spencer, Next, Debenhams, Primark, and so on. The internet and high street are therefore competing for expenditure in the same key goods categories. Mintel's Online Fashion UK 2017 Report⁶ identifies that:
- Online fashion sales account for 24% of total fashion spend in 2017, up from 17% in 2013.
 - Online fashion sales are growing at a significantly faster rate than the sector as whole, with overall sales of clothing only expected to grow by 1.3% during 2017.
 - Online-only retailers selling fashion goods - such as ASOS, Amazon and Boohoo for example - account for 38% of the UK online fashion market. These retailers do not have a physical high street presence, and are therefore able to be more responsive to new trends in the sector,

⁵<https://www.ons.gov.uk/peoplepopulationandcommunity/householdcharacteristics/homeinternetandsocialmediausage/bulletins/internetaccesshouseholdsandindividuals/2017>

⁶ <http://www.mintel.com/press-centre/fashion/uk-online-sales-of-clothing-fashion-accessories-and-footwear-grow-by-17-in-2017>



and also do not have the overheads associated with 'bricks and mortar' stores, enabling them to be more price-competitive.

- Almost 50% of those aged 18-37 have used a mobile/smartphone to buy fashion products.

2.10 Mintel comment that:

'The strength of the online fashion market stands out as the overall clothing market is struggling, with a continuing shift away from consumers spending their extra money on fashion items to spending more on leisure. The way consumers are shopping for clothes and shoes is changing; there is a buy-now, wear-now mentality and a desire to shop for clothes however and whenever they want, with consumers demanding convenient shopping that fits around their busy lifestyles. Usage and trust in online retailers is still growing'

2.11 Importantly for town centres however, Mintel found that only 15% of online shoppers buy all of their fashion items online - with the remaining 85% using both online and physical stores. Mintel state that this highlights the importance of having a 'joined up' shopping experience. Many retailers are embracing this - as well as 'click and collect' (discussed below), many retailers offer the ability to check stock levels in a particular store on their website, thus avoiding a wasted trip if a customer wants to buy a specific item, and/or offer in-store kiosks or tablets which enable a wider range of products and sizes to be browsed and ordered by a customer.

Experian forecasts and local online shopping rates

2.12 Forecasts on the proportion of total expenditure which will be accounted for by 'Special Forms of Trading' (SFT) such as online shopping are provided by Experian's RPNB (December 2017), which identifies that:

- SFT currently (2018) accounts for 15.4% of comparison goods spending. This is expected to increase to 17.8% by 2033.
- SFT currently (2018) accounts for 3.4% of convenience goods spending. This is expected to increase to 5.2% by 2033⁷.

2.13 The RPNB forecasts are national averages, and in some parts of the country online shopping rates are significantly higher. The household telephone survey undertaken in support of this study identified the proportion of residents who undertake their shopping for food and non-food goods online, and found that:

- As an average across the survey area, **24.1% of non-food shopping purchases are made online, 8.7 percentage points above the current UK average.**
- The highest proportion of online shopping for non-food goods is in **zone 8 (Harlesden & Willesden, 28.2%)** and the lowest is in **zone 3 (Burnt Oak, 18.6%)**. Therefore across all nine survey zones, the proportion of comparison goods shopping is above the Experian UK average, and in some zones is approaching double the UK average.
- As an average across the survey area, **3.5% of food shopping purchases are made online, 0.1 percentage points above the current UK average.**
- The highest proportion of online shopping for food goods is in zone 7 (Kilburn, 8.9%) and the lowest is zone 1 (Wembley, 1.05%).

⁷ Figures are adjusted by Experian to reflect online sales which are transacted from physical stores – for example, most online shopping orders placed via Asda and Sainsbury's are transacted through and distributed from the nearest large physical store branch of the retailer, rather than from a warehouse.



2.14 We have used the household survey-derived rates of online shopping to inform our quantitative assessment of the need for new retail floorspace in this study.

Click & Collect

2.15 The click & collect sector continues to benefit from increasing levels of take-up. Click & collect allows a shopper to order and pay for a product online, and then have it delivered to the nearest physical retail store of the operator, or alternatively an ever-growing network of other collection points such as local newsagents, post offices or Amazon lockers. It is forecast that click & collect will account for 13.9% of online sales by 2022.

2.16 Data from industry monitor Verdict⁸ suggests that click & collect expenditure is expected to grow by 64% between 2016 and 2021, compared to an online growth of 38% over the same period. Verdict's study forecasts that click & collect will grow across all categories, but will particularly be driven by the clothing and footwear sector.

2.17 The popularity of click & collect is clearly an important opportunity for town centres, as it can act as a footfall generator in its own right. Verdict identify that 39% of consumers make an additional purchase when collecting an item from a store, up from 29% in 2013. The average amount spent on additional in-store purchases is £13. The majority of national retailers now operate click & collect services, including those with a trading presence in Brent's town centres, however the independent retail sector has been slower to embrace it, and it is considered that this represents an important opportunity for the Borough's town and district centres.

2.18 A number of recent market developments demonstrate the increasing role which click & collect is playing in the retail sector, and how the boundaries between 'bricks and mortar' and online retail can be successfully merged:

- Westfield London offers a dedicated click & collect lounge in partnership with logistics company ConnectPlus. The customer selects the option to have online purchases sent to Westfield London; customers can then pick up or try on items in dedicated changing room facilities; and return any unwanted items before leaving.
- the refurbished flagship Zara store at Westfield Stratford City in East London includes four dedicated store areas - ladieswear, menswear, childrenswear and a separate click & collect area. Whilst store refurbishment works take place, a dedicated click & collect-only store traded from a separate unit in the centre, confirming the importance of click & collect as a shopping option.
- IKEA have opened four 'order and collect' stores in the UK in the last two years, at Westfield Stratford City, Birmingham, Norwich and Aberdeen. The stores in Stratford and Birmingham are both in town centre, high footfall locations, and are significantly smaller - the Westfield London store is just 900 sq.m. The stores have been designed to principally facilitate click & collect and order & collect (where a customer places an order for a product in the store, and then returns to collect it at a later point, or arranges to have it delivered) purchases. IKEA are planning to open further stores of this nature.

⁸ Source: Verdict Retail Channel Series – Click & Collect in the UK 2016



Zara temporary click & collect store, Westfield Stratford City

Emerging trends

- 2.19 A threat to the continued growth of click & collect is the rise of instant delivery and saver delivery. An increasing number of both food and non-food retailers are offering same-day delivery on certain products, including Sainsbury's, Argos and River Island. Retailers are increasingly partnering with companies such as Shutl - which allows customers to receive packages locally in as little as 90 minutes, or alternatively choose their own convenient one-hour delivery window - to fulfill same day orders.
- 2.20 The introduction of delivery passes - whereby a consumer pays a certain amount per year for premium delivery options including next day or guaranteed timeslot delivery of their online shopping order, also appears to be growing in popularity with retailers such as ASOS, New Look and Boohoo now offering this service. The market leader in this type of shopping option remains Amazon Prime, which offers subscribers paying a monthly fee one-day delivery on orders from the Amazon website, alongside access to other subscriber-only services including movie, TV and music streaming. This emerging trend will need to be monitored in terms of its popularity versus click & collect, particularly as it does not deliver the same 'spin off' benefits for town centres in terms of linked spending.

The evolving convenience goods sector

- 2.21 Since the 2008, there has been a considerable change in how consumers undertake their food shopping. Industry data providers Mintel described the changes as 'the trends of the whole of the post-war era [being] reversed', with the key changes in the sector being as follows:
- Superstores are seeing a reduction in market share;
 - Convenience (small-format) stores of the market leaders (e.g. Sainsbury's Local, Tesco Express) and Co-Op are gaining market share;
 - 'Discount retailers', principally Aldi and Lidl, are achieving strong levels of growth;
 - Certain retailers which are classified as non-food retailers (for example Marks & Spencer, Home Bargains and Poundland) are increasing their share of food spending;

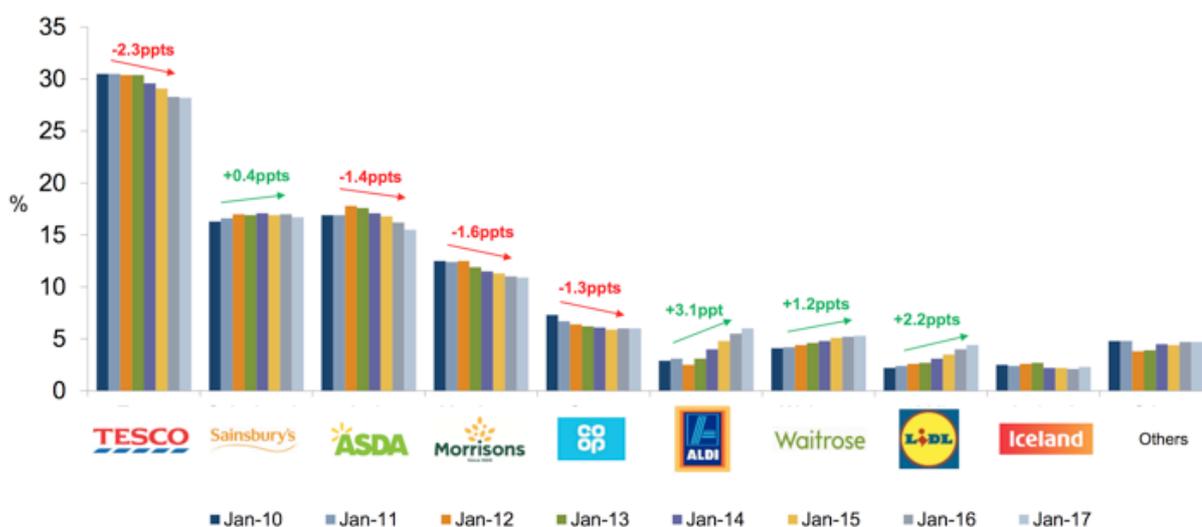


- Online demand is continuing to grow.

2.22 Mintel consider that these trends started in 2012, and there to be two principal reasons behind them:

- Firstly - and of particular relevance to Brent - Mintel consider that *‘there has been a shift of population back into inner cities and much of it into rented accommodation. These people are much more likely to shop on an ‘as needs’ basis and to eat out. So the majority of their food retail demand goes to convenience stores. This is also apparent in the growth of craft bakers and the development of specialist delis’*. The increased popularity of ‘as needs’ shopping is behind the growth of small-format ‘convenience’ stores such as Sainsbury’s Local, Tesco Express, Co-Operative, Marks & Spencer Simply Food and Little Waitrose, with this trend particularly apparent in urban areas - a considerable number of these ‘as needs’ stores have opened across the Borough since the 2008 Study. However, the failure of Morrisons’ ‘M-Local’ convenience stores suggests that the number of suitable sites for operators may be reducing, except in locations where new developments with ground floor commercial floorspace are coming forward.
- Secondly, Mintel state that *‘Aldi and Lidl have transformed their offer, expanding their ranges, strengthening their fresh foods and adding premium lines. We think this has led to a step change in their performance and that we are approaching a time when growth will be primarily driven by store openings’*. In 2017, Aldi overtook Co-Op to become the UK’s 5th-biggest supermarket by market share, and Lidl overtook Waitrose to become the 7th biggest (see **Figure 2.1**). The growth in these retailers’ market share has, however, largely been at the expense of the ‘big four’ operators - Asda, Morrisons, Sainsbury’s and Tesco. Currently Aldi and Lidl have relatively limited representation in Brent at present - Aldi has stores in Kingsbury and Kilburn; Lidl has two stores in Wembley and one in Cricklewood - and based on the trends described above there may be a commercial desire for both operators to increase representation in the Borough.

Figure 2.1 | Market share of main foodstore operators, 2010-2017 (Source: IGD)



2.23 Notwithstanding the trends described above, there is still a role for superstores. Mintel identified that in 2016, 58% of convenience goods shopping took place in superstores; 9% took place in Aldi and Lidl discount stores; 9% took place in ‘major c-stores’ (e.g. Sainsbury’s Local and Tesco Express), and 24% took place in other stores. The findings of the household telephone survey undertaken in support of this study confirm that the majority off residents in the Borough continue to undertake their main food shopping in superstores. However, owing to the changes in the market described



above, operators are opening relatively few new superstores, and are instead concentrating on ensuring their existing portfolio of stores trade more efficiently. The new Morrisons store which opened at Colindale in 2016 is an exception, but the smaller size of this store (38,000 sq.ft / 3,530 sq.m gross) reflects the smaller-sized superstore which is now preferred by operators.

- 2.24 Examples of foodstore operators seeking to use their existing space more effectively, drive additional footfall and respond to wider market trends include Argos concessions are being rolled out in larger branches of Sainsbury's⁹, and large branches of Tesco sub-letting space to other retailers including Next, Sports Direct and Currys PC World, as well as increasing space devoted to Tesco's in-house fashion and home brands. Sainsbury's are increasingly integrating branches of Argos into their network of superstores, and have also installed 'click and collect' points in stores for Argos, eBay and DPD parcel orders, whilst Morrisons offer Amazon lockers in larger stores.
- 2.25 Further change is likely to continue in the sector, as consumers' shopping habits and technology continue to evolve. New market entrants are a possibility - Amazon acquired the upmarket Whole Foods chain in 2017, and recently opened Amazon Go - the world's first checkout-less convenience store – in Seattle. In the UK, Amazon launched Amazon Fresh, intended as a direct competitor to the online operations of the 'big four' supermarkets plus existing online only retailers such as Ocado, in summer 2016 and is gradually extending its launch across the country. Amazon Fresh offers both branded and Whole Foods products, and the company has also entered into agreement with Morrisons to sell its products through the site. It is currently a membership-only service.

Banks & financial services

- 2.26 The services of the high street banks have traditionally been delivered through their branch networks, meaning that in centres at all levels in the hierarchy, the presence of a wide range of banks and building societies formed an important part of a centre's mix of uses. The numbers of bank branches in the UK have been in decline for the past thirty years, due to a variety of reasons including the desire by banks to cut costs; mergers within the industry; competitive pressures from new entrants in the banking sector; changes in the nature of retail banking transactions; and a growth in alternative means of accessing bank services, particularly driven by technological advances such as online and mobile banking.
- 2.27 The total number of branches operated by the 'big six' UK banks (Barclays, HBOS, HSBC, Lloyds, Natwest and Santander) declined from 11,240 in 1997 to 7,022 in 2014¹⁰, although in some locations this decline has been partially offset by the emergence of 'challenger' banks such as Metro Bank, Virgin Money and TSB, with the former of these in particular rapidly expanding its High Street presence. The pace of closures has gathered pace in recent years however; for example in 2017, RBS announced plans to close one quarter of its branch network.
- 2.28 According to research from CACI, customer visits to retail bank branches are forecast to drop by 36% between 2017 and 2022, with mobile transactions rising 121% in the same period. CACI estimate that the typical person will visit a retail bank branch just four times a year, down from seven in 2017.
- 2.29 Most banks have an alliance with the Post Office (whose own branch network has remained relatively stable in recent years), meaning that in most smaller centres there are still banking facilities available to those who are not able to use alternative means. However, the decline of bank branches has also served to free up large, often historic and listed commercial premises in primary shopping areas, which are in some instances challenging to let.

⁹ Sainsbury's acquired Home Retail Group, the owners of Argos and Habitat, in 2016

¹⁰ Parliament Research Briefing on bank closures, 2018 researchbriefings.files.parliament.uk/documents/SN00385/SN00385.pdf



2.30 It would appear that, for the time being at least, banks and building societies are generally keen to retain a visible presence in larger/higher-order town centres, but smaller branches in lower-order centres with a more limited customer base appear more vulnerable.

Out-of-centre retailing

2.31 Out-of-centre retailing offers the benefits of lower rents, larger retail units and in most cases, free car parking. According to Verdict, out-of-town retailing is the only form of retailing which has seen store numbers increase consistently since 2000. The Department for Business, Innovation and Skills reports that the number of out-of-centre stores has increased by up to c.1,800 (25%) since 2000.

2.32 The recovery of market confidence which took place since 2013 benefited out-of-town retailing. Vacancy rates fell, footfall has increased, and many retailers are seeking expansion in out-of-centre locations. Some traditional town centre retailers which have developed out-of-town store formats, including John Lewis, which now operates a number of 'At Home' stores in prominent out-of-centre locations, as well as other traditionally 'high street'-focussed retailers such as Debenhams, Next, Primark and H&M.

2.33 With the exception of a number of retail warehousing units along the A5 in the Cricklewood / Colindale areas, there is relatively limited out-of-centre retailing in Brent itself - although there is a significant concentration immediately outside the Borough boundary at Brent Cross / Staples Corner, which we consider in detail in the following section. There is also a large IKEA store at Brent Park, one of three IKEA stores currently serving London, and previously identified as one of the busiest IKEA stores in the world. A further concentration of out-of-centre retailing lies to the west of the Borough at Westway Cross Retail Park near Greenford, which includes Next, TK Maxx, Sports Direct and branches of Outfit.

Opportunities for town centres

The evolving role of the town centre

2.34 Retail continues to remain a vitally important footfall driver in centres, and the main reason that residents are visiting town centres. A retail offer which mixes representation from national multiple retailers which act as 'anchors' and specialist independents which provide diversity is important to attracting footfall, and we expect this to continue over the course of the Council's new Local Plan period.

2.35 However, as the nature of retail continues to change and evolve, the last few years have seen a marked evolution in the role and function of town centres. Town centre visitors are increasingly seeking to combine shopping and leisure activities as an overall 'going out' experience, and therefore successful town centres offer a strong mix of both types of activity. There is a need for town centres to offer an 'experience', not simply be a place to shop. To ensure that town and district town centres have a viable function moving forwards they must provide an attractive shopping and leisure experience which the internet is unable to match.

2.36 Many town centres already have or are successfully moving towards becoming 'experience'-based destinations, with diverse markets (Dalston, Camden, Broadway Market, Brixton, Camden Passage in Angel), strong food & beverage offers (Stoke Newington, Green Lanes, Blackheath, Camberwell), independent / specialist cinemas (Kensal Rise, Chatsworth Road in Hackney, East Dulwich) or street food venues (Shoreditch, Canada Water, Lewisham, Woolwich) all types of activities where the unique selling points contribute to the overall vitality and viability of a centre. Spitalfields Market in East London plays host to a variety of different markets and events alongside its regular market each year, including record markets, craft beer fairs and film screenings. Seasonal events such as Christmas Markets can also act as significant footfall generators.



- 2.37 The opening of Boxpark in Croydon, on a prominent site adjacent to East Croydon railway station, has had a similar effect, albeit within the context of a much larger town centre. Unlike the original Boxpark in Shoreditch, which offers a mixture of small-scale retail and food & beverage, the Croydon site is entirely devoted to hosting a broad mixture of independent / small-scale cafes, bars, and dining options, meaning it generates footfall throughout the day from its lunchtime opening to late at night. Part of the Boxpark USP is the fact that each operator is housed in a converted shipping container, with a communal seating area in the middle of all the units. A third Boxpark site is scheduled to open later in 2018 in Wembley, next to Wembley Stadium and the LDO, and its opening will further help diversify the offer of Wembley town centre in this respect. Reflecting the trends discussed above, the Wembley Boxpark will also host up to 200 events a year, and will offer a 2000-capacity event space.
- 2.38 Alongside a strong retail and leisure offer will be the need for centres to act as genuine hubs for their communities. Beyond Retail's 'Redefining the Shape and Purpose of Town Centres' (November 2013) concluded that *'town centres need to develop alternative functions to draw people back and support its retail base. Town centres will remain important as a focus for social and commercial purposes however must seek to provide more than a neighbourhood shopping role. Expanding their other roles will be an important response to the polarisation of shopping and in creating a vibrant, social, commercial and cultural hub'*.
- 2.39 By incorporating a wide range of uses - which could also include **cultural space, co-working space, workspace for SMEs, community facilities such as libraries, or health and fitness facilities, for example** - users can be attracted at different times of the day, and the 'life' of the town centre extends beyond retail trading hours and attracts a broader mix of users. Such an approach can be applied both to new developments, and through appropriate repurposing of existing redundant floorspace in centres.



Boxpark, Wembley (CGI)

- 2.40 Centres are also increasingly looking to unique / special events as a way of introducing additional footfall, boosting businesses and attracting new visitors to an area. A number of centres across South



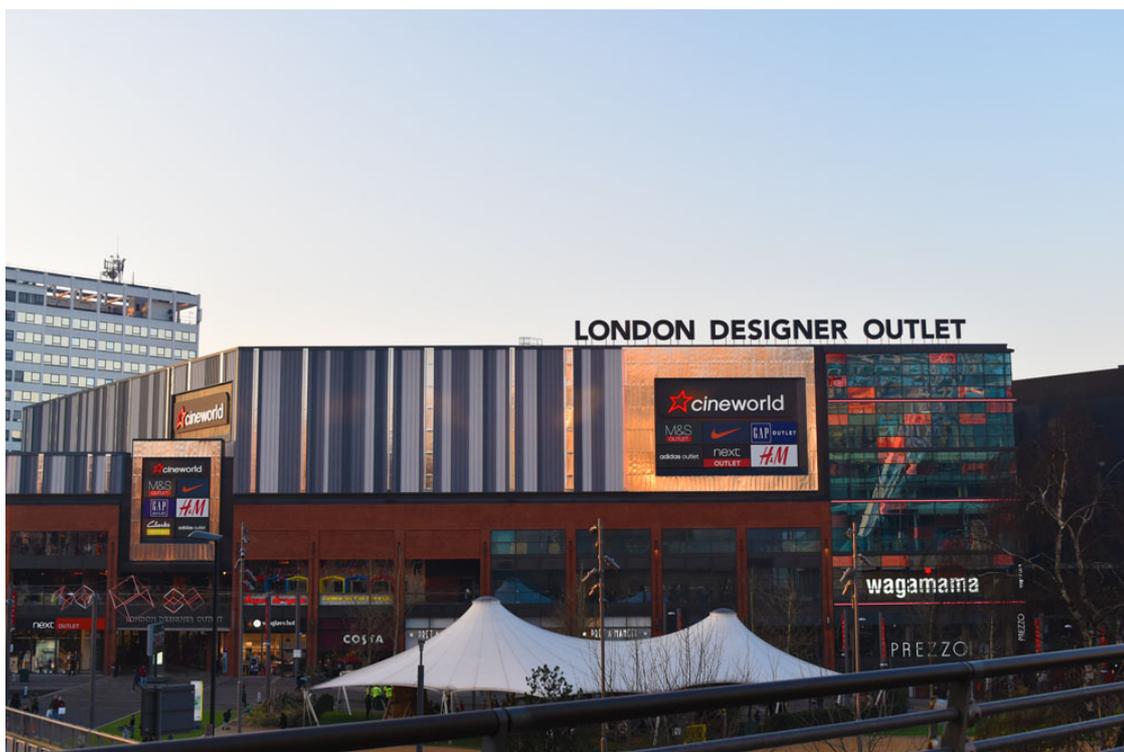
London, including Deptford, New Cross, Camberwell, Peckham, Herne Hill and Streatham have an annual free film festival, taking place in shops, bars, churches and other local amenities over the course of a week/fortnight. Streatham's Business Improvement District (BID) also runs a highly successful annual food festival, in which restaurants and bars in its town centre work together to promote their offer, and provide discounted taster menus.

- 2.41 Other examples of successful 'meanwhile' / 'pop up' events include rooftop / outdoor cinema screenings, pop up restaurants, night markets (which have been successfully run for a number of years in Brixton) and late-night opening of arts/gallery venues – for example 150 galleries across east London come together and run free events, exhibitions, talks and private views as part of a special late night opening.
- 2.42 In many cases, the work of Business Improvement Districts is particularly important in generating momentum and buy-in from businesses and tenants into the scheme, and Councils should work with BIDs and other organisations such as licencing to promote appropriate schemes. Events can often take place in meanwhile spaces which may be longer term development opportunities (for example, the Street Feast market in Woolwich is held in a former market hall, and will be operational for two years whilst longer-term plans for the redevelopment of the site are progressed through planning).

Commercial leisure in town centres

- 2.43 Commercial leisure is becoming an increasingly important component in town centre regeneration schemes across the country, including a number of centres in London (including Wembley). This trend is particularly apparent in secondary town centres, which, reflecting the wider trends in the retail sector described above, may be becoming less attractive solely as retail destinations. Cinema operators are, in some cases, replacing a flagship retailer or department store as the 'anchor' for a new town centre development scheme.
- 2.44 A wide-ranging commercial leisure offer can deliver benefits to the vitality and viability of the centre as a whole, through increased dwell-time and linked trips spend in cafes, restaurants and other commercial leisure facilities. Recent research from Cushman & Wakefield¹¹ notes that food and drink alone now accounts for more than 20% of retail and leisure units across the UK. New leisure trends such as indoor crazy golf and table tennis - termed 'competitive socialising' - are increasing in popularity and have opened in a number of shopping centres.
- 2.45 The contribution which commercial leisure can make to town centres is also identified in the GLA's 'Accommodating Growth in Town Centres' study (2013). The report states that '*most commentators predict that commercial leisure, such as cafes, bars, restaurants and cinemas, will constitute a growing share of town centre floorspace. This is partly a replacement activity for reduced demand for space for traditional retail, and partly driven by the shift in demand to leisure expenditure as discretionary household expenditure rises.*' A shift towards a broader mix in centres '*can have wider positive implications on the performance of the town centres in question: residents and visitors spend longer in the centre, undertake 'linked trips' between retail, leisure and other uses, and increase their dwell-time in a centre. The development of a strong commercial leisure offer can also help to increase footfall outside of retail hours, for example in early evenings*'. The need to diversify the offer of town centres identified in this report has been carried forward into the DLP, as summarised in Section 1.
- 2.46 The London Designer Outlet (LDO) at Wembley is an example of a new development which offers a balance of retail and commercial leisure - alongside a wide-ranging retail offer, the LDO also includes a Cineworld, several restaurants and coffee shops.

¹¹ <https://www.ribaj.com/products/leisure-outlets-revive-flagging-high-streets-hotels-leisure-josephine-smit>



London Designer Outlet, Wembley

Cafes and Restaurants

- 2.47 The coffee shop sector remains buoyant; there are now approximately 16,500 coffee shops across the country. Recent analysis shows that the UK's coffee shop sector remains one of the most successful in the nation's economy and will continue to expand. Operators such as Costa are now a High Street staple whilst the independent coffee shop sector is also growing store numbers and has welcomed a substantial number of new entrants to the market in recent years.
- 2.48 'Family dining' restaurants increased in popularity considerably in the years following the last recession, reflecting a wider trend for a higher proportion of consumer expenditure to be spent on socialising and leisure activities rather than shopping. These restaurants have also benefited from many new town centre development schemes having an increasing leisure-orientated focus, enabling them to play a complementary role to a nearby new cinema, for example, as part of the creation of an attractive leisure destination.
- 2.49 Long-time mainstays of the family dining sector such as Pizza Express, Nando's, Café Rouge and Zizzi expanded and generally continue to perform well. These were joined by a new wave of operators such as Byron, GBK, Franco Manca, Pho and Bill's, who have significantly expanded store numbers in recent years, often with the backing of private equity firms.
- 2.50 There are signs, however, that this sector of the market may be approaching saturation, and the increased competition in the sector is leading to casualties. In early 2018, Jamie's Italian announced plans to close 12 branches; Byron is undergoing restructuring and has outlined plans to close up to 20 outlets, and Strada has closed one third of its branches. Analysts suggest in addition to market saturation, the rise in food costs, staff costs, rents and business rates have all impacted on operators' profits, whilst the Brexit decision has, as we have set out above, negatively impacted on consumer confidence and therefore spending.

Public houses

- 2.51 The pub industry suffered during the recession with a record number of pub closures across the UK as a direct consequence of a decline in both drinks sales and rental revenues. This decline continues



today, at a rate of approximately 30 pub closures per week across the country. Recent data released by the Mayor of London identified that London has lost 25% of its pubs since 2001, and the number of pubs in Brent has declined by 38% over the same time. Only one London Borough - Hackney - has seen an increase in the number of pubs.

- 2.52 Sites being sold to developers, who convert to residential uses or small-format convenience stores, as well as factors such as competition from supermarkets, changes to licensing legislation and the smoking ban have all been considered to contribute to the decline in the number of pubs. During 2017, consultation was undertaken on how the numbers of pub closures across London could be reduced, as part of the Mayor's 'Culture and the Night Time Economy'. The Strategy encourages boroughs to implement the 'Agent of Change principle' – putting the onus on developers that build properties next to pubs to pay for soundproofing, ensuring residents and users of pubs and bars can co-exist.

Health & fitness

- 2.53 The health and fitness sector continues to perform strongly, and is currently being expanded through investment by a number of budget operators such as PureGym, The Gym Group and Anytime Fitness. These venues appeal to a wider market with flexible, low cost monthly or 'pay as you go' subscriptions. These facilities are usually located in high-footfall, in or edge of centre locations, often as part of a wider leisure offer. A number have opened in the Brent, including outlets of The Gym Group in Wembley, Alperton, Kingsbury and Colindale - although with the exception of these, there is a limited presence of budget operators in the Borough at present, and this might represent an area of further market growth.

Cinema

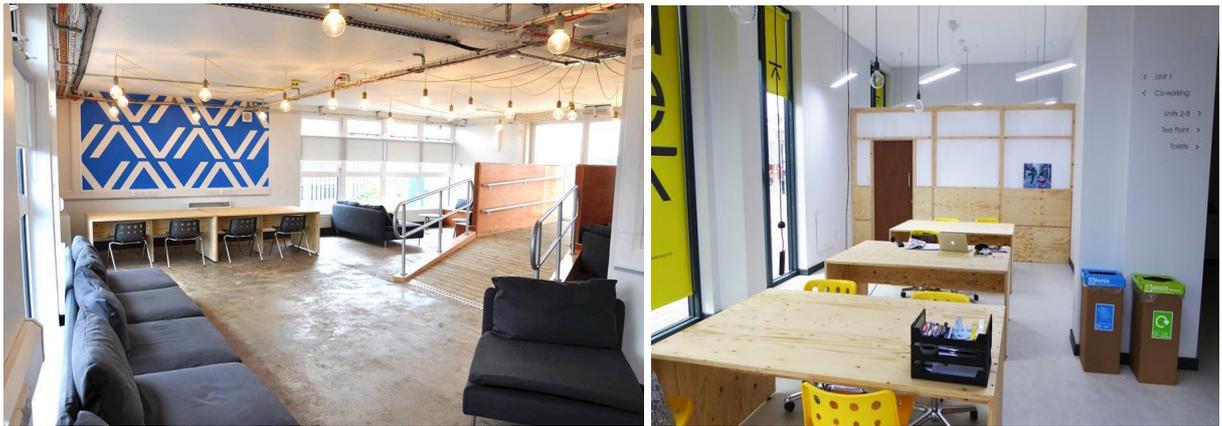
- 2.54 The cinema market continues to perform strongly, benefiting from consumers choosing to spend more of their disposable income on leisure activities. As we have highlighted above, cinemas are often considered important 'anchors' to new development schemes in their own right.
- 2.55 Both major cinema operators (e.g. Cineworld and Odeon) and smaller 'boutique' operators (e.g. Curzon and Everyman) continue to open new sites, or in the case of major operators, invest in upgrading older, more dated facilities. 'Boutique' cinema operators are willing to consider openings in smaller town centres, particularly when a development can also incorporate or benefit from close proximity to complementary leisure facilities, particularly restaurants and coffee shops, enabling them to act as leisure 'destinations' in their own right - for example, Everyman and Picturehouse are opening new facilities in Crystal Palace and West Norwood town centres in south London respectively, and in 2017 an independent, crowdfunded cinema - The Castle - opened in Chatsworth Road local centre in Hackney. 'Boutique' cinemas have opened in recent years in Kings Cross, Aldgate, Canary Wharf and New Cross, whilst in locations such as Barnet and Esher, independent operators have acquired cinemas disposed of by major operators.
- 2.56 The number of cinemas currently operational in the Borough is surprisingly limited, with just three dedicated cinema facilities. Cineworld have recently opened a nine-screen cinema in the Borough as part of the London Designer Outlet development in Wembley. Whilst there is currently no representation from the 'boutique' chains, there are two independent cinemas - the Lexi in Kensal Green and the Tricycle in Kilburn. The Borough is also surrounded by a number of other large 'multiplex' cinemas in Harrow, Park Royal and Finchley Road, each of which are accessible by residents in different parts of the Borough. The household survey undertaken in support of this study identifies the catchment of each of these facilities, and this is discussed further in Section 7 of this report.



Lexi Cinema, Kensal Rise

Multi-purpose space

- 2.57 Brent Council's new civic offices are a good example of a multi-purpose facility, bringing together civic services and offices, a library and café facilities in a single building. The Council's new library facility in Willesden Green also contains a museum. In other locations, an even greater number of uses have been brought together – the Curve development in Slough, which opened in 2016, houses a performance venue, library, café, museum, exhibition space, community learning and skills service and register office.
- 2.58 Other uses such as co-working space can also play an important role in utilising redundant space in town centres whilst simultaneously bringing in new footfall and workers. In Lewisham for example, an area with the highest percentage of 'very small businesses' in the country (84% of businesses in the Borough), but very little in the way of available space for these businesses to occupy, the Council secured funding from the New Homes Bonus and GLA High Street Fund to support the refurbishment and fit-out of three vacant council-owned buildings in Ladywell, Catford and Deptford town centres, to provide a network of business enterprise spaces. The co-working spaces are designed to promote the growth of start-ups, entrepreneurs and existing businesses, primarily working in the creative, digital media, business and social enterprise sectors.



DEK Workspaces in Catford (L) and Ladywell (R) town centres

SME Workspace

- 2.59 Brent is home to a strong and growing SME workspace market: around 60 workspace premises providing flexible and affordable workspace for businesses were operational in early 2017, with additional premises becoming operational in the period since.
- 2.60 The 2017 Brent Workspace Study highlights that supply is typically greatest within the south of the Borough, and that workspaces are largely clustered within key town centres, including Wembley, Willesden Green and Kilburn (although there is a limited amount of provision within industrial areas). The majority of spaces are in the managed workspace and creative studio space categories and are geared towards B-Use class employment activities. Flexible spaces for non-B class uses have in the main been limited to temporary and meanwhile provision (such as the publicly funded Queen's Parade project in Willesden Green, and the forthcoming Boxpark project in Wembley).
- 2.61 The vitality of the Brent workspace market has been enhanced by the existence of a strong workspace planning policy. However, while this has worked well in terms of securing the provision of new affordable space, challenges have been identified in securing the fit out, occupancy and long-term security of these. At the other end of the scale, permitted development represents a significant threat to workspace in the Borough.
- 2.62 With evidence of strong and increasing demand and need, the Brent Workspace Study recommends that Brent Council continues to support the growth of the workspace market in the Borough: both through its planning policy and through its wider activities to support and curate inclusive growth. Generally speaking, future opportunities for workspace are likely to continue to be strongest within the Borough's town centres and employment areas – particularly those in the south and centre of the Borough. This reflects the fact that these locations tend to accommodate many of the factors which will be important for both operators and businesses – including connectivity, strong amenity, and existing business clusters and networks.
- 2.63 Growth in demand is expected across all workspace typologies – particularly those at the more creative end of the spectrum (e.g. incubators, accelerators and co-working space) where provision is currently limited. As the economy evolves, demand is likely to grow for sector targeted workspace (e.g. creative space in Wembley and food and drink focused space in Park Royal).
- 2.64 Away from employment (B Use Class) focused spaces, demand is also growing across London for new models of spaces for consumption (e.g. shared / flexible retail spaces allowing start-ups to test new ideas, and new spaces for leisure / recreation spaces). Brent is no exception to this: such spaces have an important role to play in supporting high street vitality by retaining / generating footfall and spend and helping to raise profiles and change perceptions. The large-scale regeneration programmes



underway across the Borough and the forthcoming Borough of Culture programme are likely to generate immediate opportunities in terms of demand and interest.

- 2.65 The Brent Workspace Study recommends that the supply of (and demand for) these spaces in the Borough continues to be monitored to help inform a proactive and flexible policy approach, and to help inform the development and delivery of supporting interventions.

Residential uses in town centres

- 2.66 New developments in town centre are increasingly also incorporating residential uses to upper levels, ensuring they are genuinely mixed use in nature. The introduction of a larger residential community can support a centre's night-time economy and provide additional footfall outside of typical retail trading hours to new and existing businesses. The provision of new residential development in town centres also supports the Draft London Plan aspiration to densify town centres, particularly across suburban London.
- 2.67 Examples of successful mixed-use regeneration schemes which have incorporated residential uses include Walthamstow's 'The Scene', which opened on a prominent town centre site in Walthamstow town centre in 2014, combining an Empire cinema, restaurants and homes with a new public space.

The night-time economy

- 2.68 Alongside having a strong evening economy - cinemas, theatres, bars, restaurants, as discussed above - the night-time economy is increasingly been recognised as an equally important driver of economic growth. The night-time economy is worth 6% of UK gross domestic product, equivalent to £66bn annually, according to the Night Time Industries Association. The night-time typically, for the purposes of planning at least, refers to late night bars, clubs, and associated uses such as takeaways and late night fast-food outlets, but also has clear overlap with the wider creative and cultural offerings of centres.
- 2.69 Recent years have seen publication of statistics showing that in many parts of the UK night-time uses are decreasing – for example across the UK, 44% of nightclubs closed between 2005 and 2015. London has 103 fewer nightclubs and live music venues compared to 2007, and is losing pubs at the rate of 140 a year, according to CAMRA.
- 2.70 Figure 2.2 shows the locations of nightclub venues in Central London, which were mapped by Nesta¹². The purple dots on the map represent nightclub venues¹³ which were open in 2005 but have now ceased operations, whilst the orange dots show venues still operational or which have opened since 2005. There are a broad variety of reasons for the decrease in uses, ranging from societal changes to planning and licencing matters, but the decline has been sufficient that the Mayor of London has recently published strategic guidance to help support and grow London's night time economy, which we discuss below.
- 2.71 Although London has always had a bustling night-time economy, particularly in central London/the West End and, more recently, in Shoreditch / Dalston (as shown in Figure 2.2), the significance of the night-time uses to the economy of London has gained increased recognition over the last couple of years - partly due to the publication of statistics such as those above - and partly due to positive developments such as the 'Night Tube' commencing service on a number of Underground lines (including the Jubilee Line, which runs through a number of Brent's key centres, and offers a service at 10 minute intervals throughout the night on Fridays and Saturdays), as well as the Mayor of London's appointment of a 'night tsar' to champion London's nightlife help oversee the creation of a stronger night time economy in London.

¹² Nesta, 'The clubbing map: What has happened to London nightlife?' <https://www.nesta.org.uk/blog/the-clubbing-map-what-has-happened-to-london-nightlife/>

¹³ Nesta mapped all venues in London which hosted electronic/club nights.



2.72 Nesta’s mapping shows that there are relatively few nightclub/late night venues across Brent, reflecting the tendency for these to be concentrated in central and east London. There is a small concentration in Kilburn, where popular gig, pub and club venue The Good Ship closed in 2017.

Figure 2.2 | Changes in the provision of nightclub venues in central London, 2005-15



Source: Nesta (see footnote 11)

- 2.73 In July 2017, the Mayor of London published a vision for London as a 24-hour city. It identifies that night-time economy uses in London employ 725,000 people - and that an entire ‘ecosystem’ of industries support the city’s night-time economy. It also recognises that a joined-up approach is needed by local planning authorities and other bodies to deliver a successful night-time economy, covering planning, licencing, culture, regeneration and community safety. The vision sets out ten principles for the development of London at night.
- 2.74 This vision was followed by a ‘Culture and the Night Time Economy’ Supplementary Planning Guidance (SPG)¹⁴, which sets out a strategy including the protection of pubs, supporting existing venues and providing new facilities, broadening the range of evening and night-time activities, and ensuring facilities are accessible for all. Of particular relevance in the context of this study is the aspiration of the SPG to ‘promote customer cross-over and create bridges between the day and night-time economy’, which may include extending opening hours of existing daytime facilities such as shops, cafes, medical facilities and libraries.
- 2.75 The SPG also states that Boroughs should identify cultural quarters and they should promote and manage the night-time economy as part of their approach to supporting the economic contribution of leisure, arts, cultural and tourism activities.
- 2.76 The Draft London Plan’s adoption of the ‘Agent of Change principle’ is another significant development which, if carried forward to the adopted Plan, provides additional protection for existing night-time economy uses by placing the responsibility for mitigating the impact of noise on the new development. As the DLP explains:

¹⁴ https://www.london.gov.uk/sites/default/files/culture_and_night-time_economy_spg_final.pdf



'Where new developments are proposed close to existing noise-generating uses, applicants will need to design them in a more sensitive way to protect the new occupiers, such as new residents, businesses, schools and religious institutions, from noise impacts. This could include paying for soundproofing for the existing noise-generating uses, such as an existing music venue. The Agent of Change principle works both ways. If a new noise-generating use is proposed close to existing noise-sensitive uses, such as residential development or businesses, the onus is on the new use to ensure its building or activity is designed to protect existing users or residents from noise impacts.'

- 2.77 There are other planning mechanisms which can be used to protect important night-time economy venues. This can include the designation of a pub, club or other cultural venue as an Asset of Community Value (ACV), meaning that the owners of the premises cannot sell the venue without establishing whether a community group would like to bid for it. If there is interest from the community, they have six months to put together a bid to buy it. However, the owner is under no obligation to accept that bid, or to sell at anything other than market value.
- 2.78 Section 106 agreements are also a way of funding new venues and facilities in certain circumstances. In the first use of S106 powers of its kind, in 2017 Tower Hamlets Council used S106 to require developers of a site in Hackney Road, Shoreditch which was - prior to the site being acquired for development - home to an important LGBT venue, the Joiners Arms, to actively seek a replacement LGBT operator for the replacement pub on the site for a period of 24 months, whilst the Council also engaged a noise specialist to look at how the new venue could operate later hours without causing harm to people living nearby. A range of planning conditions covering detailed design, noise control and management were then agreed with the developer.
- 2.79 We understand that the Council is currently preparing a strategy to promote the night-time economy in its two Major centres of Wembley and Kilburn, ultimately aiming for the centres to secure 'Purple Flag' status. An initiative launched by the Association of Town & City Management in 2012, similar to Green Flag awards for parks and Blue Flag awards for beaches, securing Purple Flag status allows members of the public to 'quickly identify town and city centres that offer an entertaining, diverse, safe and enjoyable night out'. Currently the only locations in London which have a Purple Flag are Leicester Square in central London and Beckenham in south London.



3 |

The sub-regional context



3. The sub-regional context

- 3.1 In this section, we set out the sub-regional context within which the centres in Brent operate. This is an important exercise, as the Borough is surrounded by a number of ‘higher-order’ retail destinations - including Shepherd’s Bush and Harrow, which are defined as Metropolitan Centres in the Draft London Plan (DLP), as well as Brent Cross Shopping Centre, which the Draft London Plan identifies as a future potential Metropolitan Centre (although it is currently unclassified). Many residents of Brent also benefit from good access to central London and its internationally-renowned retail, leisure and cultural offer. The presence of these shopping destinations outside the Borough boundaries means that loss of expenditure, particularly in terms of comparison goods spending, is inevitable. Indeed, some residents of the Borough live in closer to proximity to shopping destinations outside the Borough than to the higher-order centres in Brent.
- 3.2 Patterns of retail and leisure visits are not ‘closed’ systems, and residents are often prepared to travel longer distances, particularly for comparison goods shopping and leisure visits. It is, therefore, natural to expect a degree of expenditure loss to the surrounding network of town centres and other shopping destinations; this is simply part of the retail hierarchy of an area.
- 3.3 Reviewing the influence which the sub-regional centres is also an important exercise because it enables the influence of the opening of Westfield London (WL) in Shepherd’s Bush on the Borough’s shopping patterns to be fully understood. As we have set out previously, the 2008 Study pre-dates the opening of WL, and therefore below we identify the extent to which the opening of WL has altered comparison goods shopping patterns for residents in the study area. WL is also an important leisure destination, and we consider its role in respect of this separately in Section 7.

The findings of the household telephone survey

- 3.4 The household survey identified the most popular locations for comparison goods shopping in the survey area are as follows, with their current (2018) comparison goods turnover from the survey area also shown:
- **Brent Cross/Staples Corner** (£523.20m of comparison goods spend from survey area)
 - **Central London** (£177.44m of comparison goods spend from survey area)
 - **Harrow** (£145.23m of comparison goods spend from survey area)
 - **Kilburn** (£99.60m of comparison goods spend from survey area)
 - **Shepherd’s Bush (incl. WL)** (£78.85m of comparison goods spend from survey area)
 - **Wembley** (£48.11m of comparison goods spend from survey area; excludes London Designer Outlet)
- 3.5 It can be seen that Brent Cross/Staples Corner dominates the comparison goods spending patterns in the survey area, accounting for 31.5% of total available comparison goods spend. The majority of this is accounted for by Brent Cross Shopping Centre (£397.44m comparison goods turnover / 22.9% of comparison goods spend), with Staples Corner Retail Park attracting £97.20m (5.9%) of comparison goods spend, Brent South Shopping Park £42.75m (2.6%) and non-food goods in Tesco, Hendon Way a further £3.81m (0.2%).
- 3.6 The comparison goods turnover of stores in the Brent Cross / Staples Corner area is approximately three times that of the location which attracts the second-highest comparison goods turnover (Central London, £177.44m). The highest comparison goods turnovers achieved by any centres in Brent are Kilburn and Wembley town centres, which reflects their role and function as higher-order ‘major’ centres. District and local centres have lower comparison goods turnovers, reflecting their



more limited comparison goods offer; for example the district centre with the highest comparison goods turnover is Harlesden (£25.59m).

3.7 **Table 3.1** summarises the comparison goods turnover of the key comparison goods shopping destinations, their Draft London Plan classification, total amount of comparison goods floorspace, and the proportion of total available comparison goods spend available to the survey area which is spent in the centre. This latter figure is also contrasted with the equivalent percentage figure from the 2008 Study, to show where centres have lost or gained market share in the intervening period.

3.8 Table 3.1 shows that:

- Brent Cross has increased its market share from the survey area by 8.5 percentage points since 2008;
- Central London’s market share from the survey area has declined by 5.1 percentage points since 2008;
- Harrow’s market share has remained virtually unchanged;
- Kilburn town centre has slightly increased its market share from the survey area by 0.7 percentage points;
- Wembley town centre’s market share has declined by almost half, losing 2.6 percentage points relative to the position in 2008. If the turnover of London Designer Outlet is included (although this development does not form part of the current defined frontage), Wembley’s comparison goods turnover increases to £62.56m (3.8% market share). Therefore, the opening of the LDO has not been sufficient to stem a decline in Wembley’s comparison goods market share relative to 2008.

Table 3.1 | Summary of key comparison goods shopping destinations

	Draft London Plan (2017) hierarchy	Comparison goods floorspace sq.m	Comparison goods turnover from survey area 2018 (£m)	% of total comparison goods spend from survey area 2018	% of total comparison goods spend from survey area 2008	Change in % comparison goods spend from survey area 2008-18
Brent Cross	None (<i>potential Metropolitan</i>)*	89,065	523.20 ⁽¹⁾	31.5% ⁽¹⁾	23.0% ⁽¹⁾	+8.5%
Central London	International	445,847	177.44	10.7%	15.8%	-5.1%
Harrow	Metropolitan	59,593	145.23	8.8%	8.7%	+0.1%
Kilburn	Major	14,672**	99.60	6.0%	5.3%	+0.5%
Shepherd’s Bush	Metropolitan (<i>potential International</i>)*	126,461	78.85	4.8%	-	-
Wembley	Major	13,686**	48.11 ⁽²⁾	2.9% ⁽²⁾	5.5% ⁽²⁾	-2.6%

Sources: Classifications: Draft London Plan (2017). Floorspace: GLA Town Centre Healthchecks (2017). Turnover: Appendix 1, Table 5a. 2008 figures: Appendix 3, Table 6 of 2008 Study.

Note: (1) Combined figures for Brent Cross and Staples Corner retail warehousing. (2) Figure excludes London Designer Outlet and other nearby areas of retail activity e.g. retail warehousing and Wembley Park district centre

* the DLP identifies these locations could potentially be re-classified in future iterations of the DLP. **net sq.m figures (others in column are gross sq.m)



- 3.9 Below we review the offer in each of the key competing centres/shopping destinations surrounding Brent in full, summarising their current retail and leisure offer, planned investments which may alter their 'market share' in future years, and identifying their catchment from the study area.

Brent Cross

- 3.10 Brent Cross sits immediately to the eastern boundary of the Borough, and prior to the opening of the two Westfield developments at Shepherd's Bush and Stratford, was the largest purpose-built shopping centre in London. At the time of its opening in 1976, it was the first mall-style shopping centre in the UK.

Review of retail and leisure offer at Brent Cross

- 3.11 Anchored by three department stores - Fenwick, John Lewis and Marks & Spencer – the centre offers a broad array of fashion/clothing and lifestyle stores which is predominantly given over to national retailers. The centre includes representation from mid-market operators such as H&M, Topshop/Topman, Zara, All Saints, Office, River Island, and so on, and has a good level of representation from premium operators such as Dune, Reiss, Whistles and Anthropologie, reflected in its Venuescore retail profile of 'Upscale'. There are approximately 120 stores in the centre in total. Supporting the retail offer is a limited range of family restaurants such as Carluccio's, GBK, Nando's and Pizza Express, and a number of coffee shops operators.

- 3.12 There is considerable overlap between the retail offer of Brent Cross and that of WL, although the latter has a more extensive premium retail offer, and a wider-ranging commercial leisure offer.

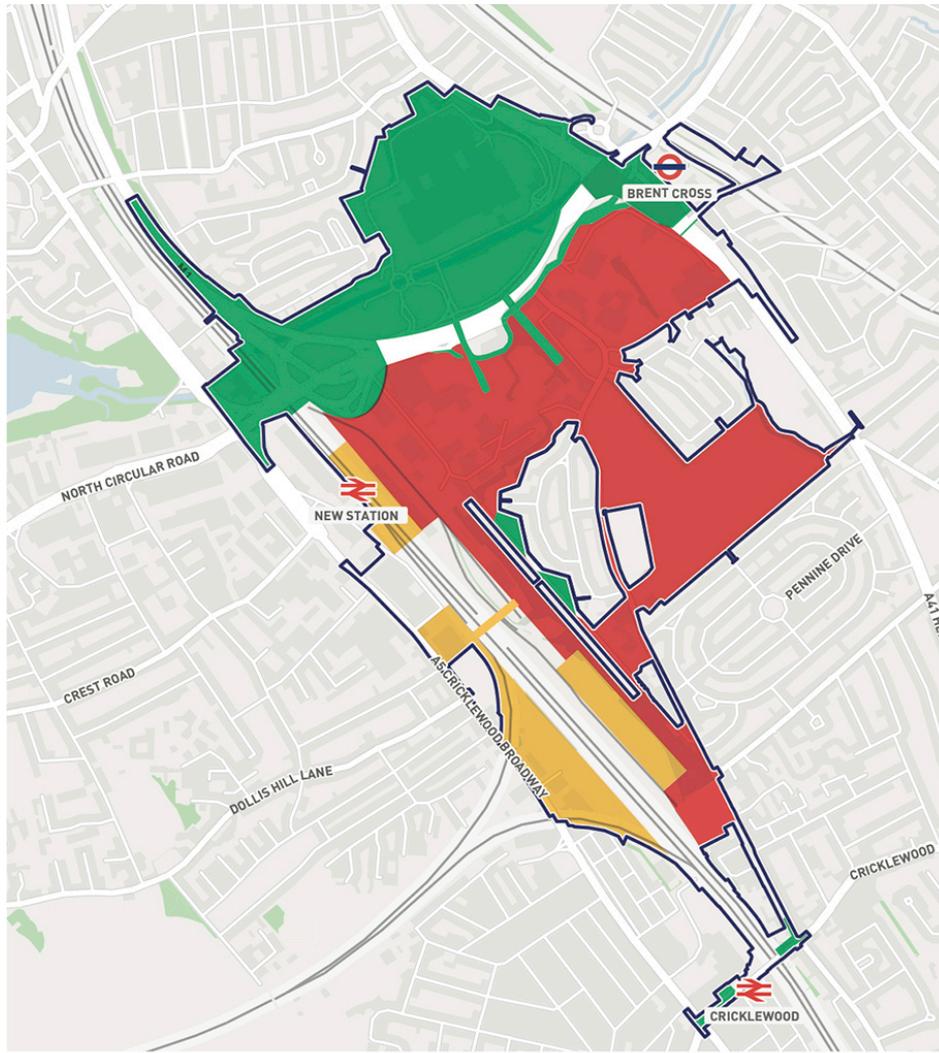
Recent and planned investment in Brent Cross

- 3.13 In 2010 Hammerson and Standard Life Investments secured outline planning permission for a £4 billion masterplan to regenerate the Brent Cross and Cricklewood area, delivering a new town centre including new retail space, a redeveloped/extended Brent Cross Shopping Centre, new homes, educational and community facilities and infrastructure improvements. A Section 73 planning application to vary the approved scheme was subsequently granted planning permission in 2014. Barnet Council is responsible for overseeing the comprehensive regeneration of the Brent Cross Cricklewood area.
- 3.14 The masterplan for Brent Cross Cricklewood covers 141 hectares (370 acres); Hammerson and Standard Life Investments will deliver the northern half of the site ('Brent Cross London'), with a focus on a redeveloped/extended Brent Cross Shopping Centre, whilst Argent Related and the London Borough of Barnet will deliver the southern half ('Brent Cross South'). A further area of regeneration will be focussed around a new Thameslink railway station (see plan at **Figure 3.1**).
- 3.15 In July 2018, Hammerson and Standard Life confirmed that the start date on the scheme had been deferred owing to 'the current turbulent period in UK retail and uncertainty with the current outlook'; as such we are not presently aware of an anticipated start or completion date for the scheme. Enabling works were previously scheduled to commence in 2018. Hammerson have stated that they are continuing to monitor 'external market conditions' and will confirm a new start date 'when conditions are appropriate.'¹⁵

¹⁵ <https://www.architectsjournal.co.uk/news/chapman-taylor-and-callison-rtkls-14bn-brent-cross-revamp-stalls/10033629.article>



Figure 3.1 | Plan of Brent Cross Cricklewood Regeneration Area¹⁶



Key

- Overall Brent Cross Cricklewood (BXC) regeneration area
- Brent Cross London area
Hammerson and Standard Life Investments
- Brent Cross South area
Argent Related + Barnet Council
- Brent Cross Thameslink area
Barnet Council + Network Rail

3.16 The Draft London Plan (2017) does not currently identify Brent Cross Shopping Centre within London’s hierarchy of centres; however it identifies Brent Cross Cricklewood as a potential future Metropolitan Centre in light of the proposals expected to come forward, which we consider in more detail below.

Brent Cross London

3.17 Brent Cross London will see the delivery of 2 million sq.ft (185,000 sq.m) of new retail and leisure space, including 150 new retail stores, 50 new restaurants, a cinema complex, hotel accommodation, a new town square and new public spaces. To date there has been no confirmation of proposed operators for the proposed retail and leisure floorspace, except that Marks & Spencer will relocate to

¹⁶ Source: <https://brentcrosssouth.co.uk/planning-information/>



a new larger store within the development. The addition of 150 new retail stores will more than double the current retail/leisure offer of the centre to c. 270 units, although this will still be lower than the total at the expanded WL (c. 450 units).

Brent Cross South

- 3.18 Brent Cross South is a residential-led comprehensive regeneration of the area south of the North Circular, east of the Midland Mainline and west of the A1 Hendon Way which will deliver 6,700 new homes, up to 4 million sq.ft (372,000 sq.m) of new office space, improved public transport connections (see below), and a wide range of new/improved community and educational facilities. Central to the Brent Cross South area will be a new high street, with a focus on local shops, restaurants and amenities (contrasting with the mainstream/multiple retailer offer of Brent Cross Shopping Centre). A new bridge over the North Circular will link Brent Cross South with Brent Cross Shopping Centre.

Thameslink Station Quarter

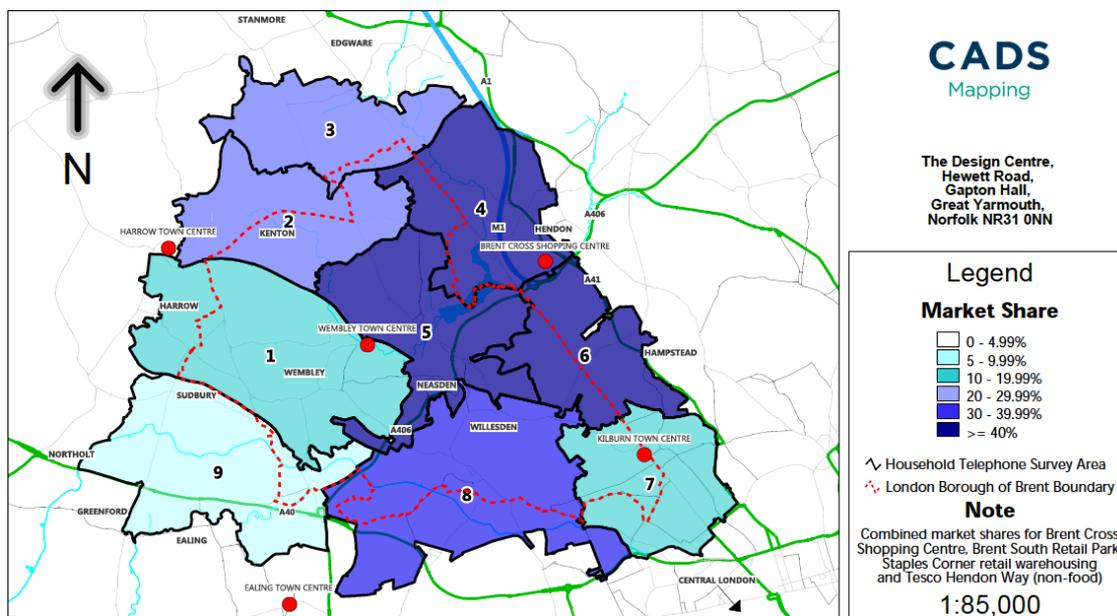
- 3.19 The planning documentation for the redevelopment of Brent Cross acknowledges that the existing Shopping Centre benefits from poor integration with the wider surrounding area on account of the presence of heavy road and rail infrastructure, including the Midland Main Line railway, M1 motorway and North Circular.
- 3.20 Barnet Council is working with Network Rail to deliver an additional Thameslink station to serve the Brent Cross Cricklewood area, with the new station acting as the focus of a proposed new 'Thameslink Station Quarter'. The new station - Brent Cross West - will sit between Cricklewood and Hendon on the Thameslink route, providing direct connections to Kings Cross St Pancras and the City of London. Outline planning permission for the Thameslink station quarter has been granted, and the associated infrastructure works have been brought forward in the overall development programme from 2031 and will now see the new station open in 2022. Importantly for Brent, the Thameslink Station Quarter will include the construction of a new bridge for vehicles and pedestrians across the Midland Main Line, improving the connectivity of residents in the Neasden / Dollis Hill / Cricklewood areas to the Brent Cross, its enhanced retail offer and employment opportunities.

Brent Cross's influence over the study area

- 3.21 The retail destinations at Brent Cross / Staples Corner combined draw £523.20m of comparison goods spend from the survey area, equivalent to 31.6% of total comparison spend available to the survey area. The majority of this is accounted for by Brent Cross Shopping Centre, which draws £379.44m of comparison goods spend from the study area, equivalent to 22.9% of the total comparison goods spend available to the study area. At the time of the 2008 Study, 23.0% of the total comparison goods spend was directed towards Brent Cross / Staples Corner. Brent Cross has therefore increased its influence as a comparison goods shopping destination over the survey area by 8.6 percentage points since the 2008 Study.
- 3.22 Brent Cross' influence over the survey area is shown in Figure 3.2. The darker-shaded zones show the areas where Brent Cross' influence is strongest, with Brent Cross drawing a market share upwards of 40% from each of zones 4 (Colindale & Brent Cross), 5 (Neasden) and 6 (Cricklewood), as well as a market share of over 30% from zone 8 (Harlesden & Willesden). Its influence over the zones towards the west of the survey area (zones 1 and 9) is noticeably more limited.



Figure 3.2 | Brent Cross comparison goods catchment plan



source: household survey results (see Appendix 1, Table 4)

3.23 As discussed above, linkages into Brent Cross from Brent itself will be strengthened by the addition of a new vehicular and pedestrian crossing into the area. Presently, access to Brent Cross Shopping Centre from Brent by public transport is restricted to a number of bus services, with most parts of the Borough benefiting from access by one or more bus services. These include route 142 (Brent Cross to Watford via Burnt Oak and Colindale), 182 (Brent Cross to Uxbridge via Neasden and Wembley), 189 (Brent Cross to Marble Arch via Cricklewood and Kilburn), 266 (Brent Cross to Hammersmith via Cricklewood, Willesden and Harlesden).

Central London / The West End

3.24 Central London and the West End - which comprises of key retailing, employment and leisure areas such as Oxford Street, Regent Street, Tottenham Court Road, Soho, Carnaby and Covent Garden. The West End is recognised as a an 'International' centre in the Draft London Plan, and is a globally-renowned retail and leisure destination which offers a wide range of comparison goods shopping.

Review of retail and leisure offer in Central London / The West End

3.25 The retail and leisure offer across Central London and the West End includes:

- Large flagship stores for a range of national and international brands on Oxford Street and Regent Street - including department stores such as Selfridges, John Lewis, Liberty, Marks & Spencer and Debenhams, and 'flagship' branches of fashion and lifestyle brands such as Apple, Nike, Topshop/Topman, Primark, H&M, Zara, and Uniqlo, and, on Regent Street, higher-end brands such as Ralph Lauren, Calvin Klein, Hugo Boss, Timberland and such, as well as stores such as Hamleys which act as tourist attractions in their own right.
- Covent Garden, Soho and Carnaby Street play host to more specialist brands, again with a focus on boutique clothing, footwear and lifestyle stores such as Cath Kidston, Kieh!s, Farah, Jigsaw, Hobbs, Muji, Nixon, Orla Kiely and so on. Elsewhere in Covent Garden, a second central London Apple store and the historic covered market are destinations in their own right.



- Tottenham Court Road is a focus for furniture and design stores, includes flagship branches of Paperchase, Habitat and Heal's.

3.26 Central London also has an extensive, long-standing commercial leisure offer which draws visitors from across London, the UK and the world. Its range of theatres, dance and opera venues, live music venues, art galleries, exhibition spaces, nightclubs and LGBT+ venues is renowned, and continues to form an important part of London's appeal. Supporting this leisure offer is a vast array of restaurants, bars, coffee shops and hotels. Investment in the sector appears to have remained strong, with a regular stream of new openings from commercial operators, including a handful of major developments such as the Picturehouse Central cinema in the former Trocadero Centre in Piccadilly.

Recent and planned investment in Central London

3.27 Central London and the West End continues to experience significant investment, from existing retailers refurbishing their 'flagship' stores (such as John Lewis and Debenhams), new operators being attracted (for example, since the Council's previous retail study, two large Primark stores have opened on Oxford Street), and investment in the development of new retail floorspace and the public realm. The development of the mixed-use Oriana scheme on Oxford Street will, upon completion, deliver over 20,000 sq.m of new retail floorspace over two phases. The redevelopment of The Plaza Shopping Centre on Oxford Street is nearing completion, and will deliver a new flagship retail store for Next.

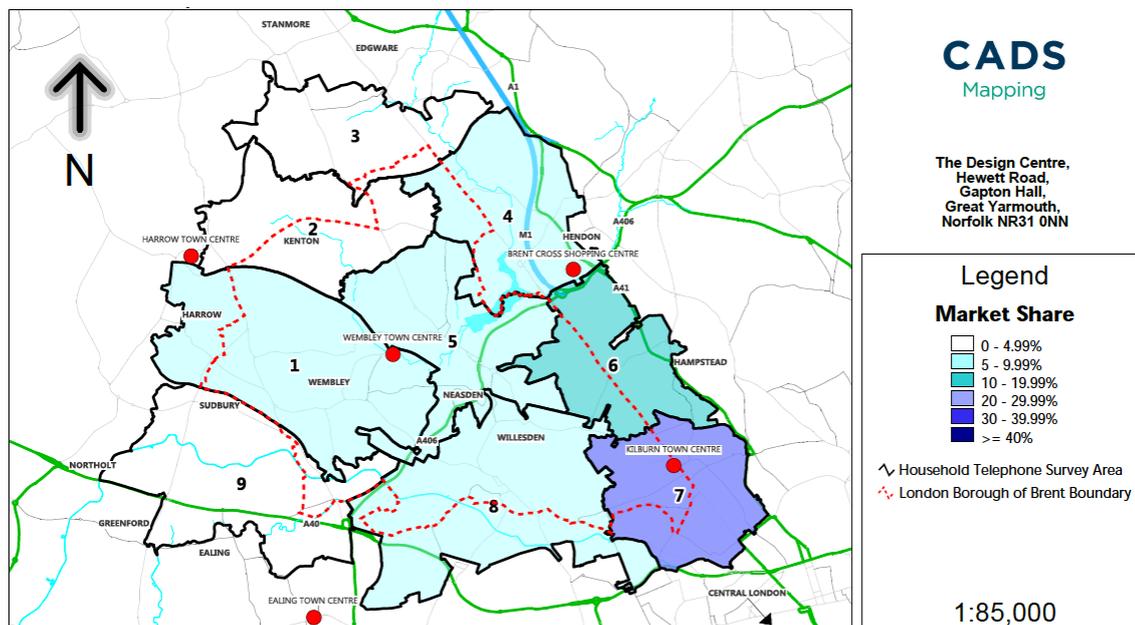
3.28 The imminent arrival of Crossrail is providing considerable stimulus for the regeneration of the eastern end of Oxford Street with modern new retail floorspace and offices. The Mayor of London has recently published plans to pedestrianise Oxford Street in a phased series of works, although these have been halted following objections from Westminster City Council. Should these plans ultimately progress, we would not expect these works to result in the West End substantially increasing its existing 'market share' it claims from the survey area for non-food shopping over and above its current trade draw (owing to its already strong retail and wider leisure/entertainment offer) it will consolidate its attractiveness as a shopping destination for London, national and international shoppers.

Central London's influence over the study area

3.29 Central London draws a total of £177.43m of comparison goods spend from the study area (10.7% of total comparison goods expenditure), of which £150.19m is spent in the West End (e.g. Oxford Street, Regent Street, Soho) and £27.25m is spent in other locations such as Camden and Shoreditch. Central London's influence over shopping patterns is however largely restricted to zone 7 (Kilburn), from where it draws a market share of 29.4%. From zone 6 (Cricklewood) the market share to central London is 11.8%; in the remaining seven survey zones, the market share attracted to central London is under 10% (**Figure 3.3**).



Figure 3.3 | Central London comparison goods catchment plan



source: household survey results (see Appendix 1, Table 4)

3.30 Many parts of Brent benefit from strong access to Central London’s wide and varied retail offer, for example the Jubilee Line provides direct access to Bond Street (for Oxford Street) and Green Park (for Regent Street / Piccadilly) from Kilburn, Willesden, Neasden, Wembley Park and Kingsbury, and the Bakerloo line links centres such as Kilburn, Queen’s Park, Willesden (via Willesden Junction), Harlesden, Wembley and Kenton to Oxford Circus, Piccadilly and Charing Cross (for Covent Garden). A number of bus services also link key centres in the Borough with central London, including route 16 which runs from Cricklewood direct along the A5 into central London.

Harrow

3.31 Harrow sits immediately outside the western boundary of the survey area, and therefore for many residents in the north/western parts of the survey area it is the nearest ‘higher-order’ centre. The Draft London Plan identifies Harrow as a Metropolitan town centre. The recently-produced Harrow Economic Development Needs Assessment (Lichfields, 2017) identifies that Harrow town centre has a ‘reasonable range’ of comparison goods shops, and a ‘relatively good’ provision of cafes, pubs, restaurants and bars.

3.32 Scope for a small boutique cinema in the Borough is identified by the study, which recommends Harrow town centre to be the most suitable location for such a facility. The need for a new tenpin bowling facility is also identified. If either of these facilities were to come forward, we would expect them to draw custom from residents in Brent. We are not aware of any proposals for new facilities of this nature at present.

Review of retail and leisure offer in Harrow

3.33 The focus of the comparison goods shopping offer is St Ann’s Shopping Centre, which contains a range of mid-market / general merchandise comparison goods retailers including Marks & Spencer, Primark, Flying Tiger, WHSmith and H&M. A second shopping centre, St George’s, contains large branches of Boots and Wilko, a second H&M store, and a Vue cinema. A Debenhams store anchors the northern end of the town centre. The retail offer is, for the most part, relatively mainstream, with



a lack of more premium/more upmarket retailers. There also appears to be a relatively limited food & beverage offer in the centre.

Recent and planned investment in Harrow

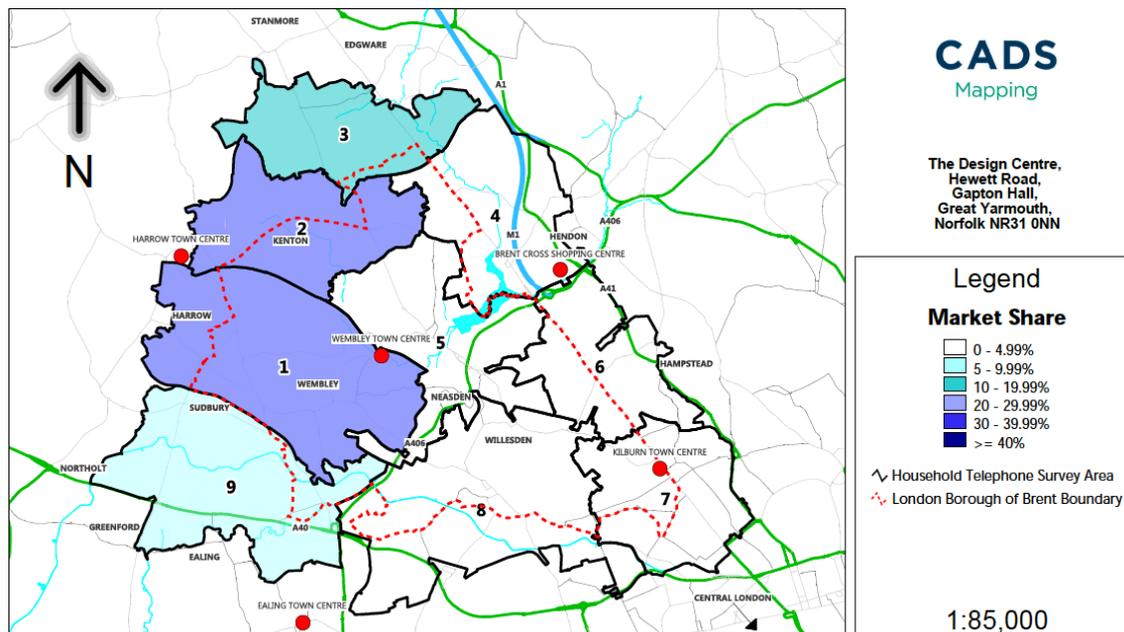
- 3.34 An Area Action Plan has been produced for the 'Heart of Harrow' area, which includes the town centres of Harrow and Wealdstone, plus the Station Road corridor which links the two centres, and the industrial land and open spaces surrounding Wealdstone. The AAP considers that Harrow town centre needs a 'dramatic uplift' in its image and offer to better reflect its Metropolitan Centre status, and that a more diverse range of uses in Harrow town centre is required. Proposals identified for Harrow town centre in the AAP include:
- delivering up to 5,500 new homes with the Action Plan area, to assist in adding to town centre vitality.
 - A new civic centre for the Council, plus a new central library and arts provision
 - Enhanced town centre evening economy, with a strong leisure, cultural and improved quality of restaurant offer.
 - Improvements to Harrow-on-the-Hill rail/underground station
 - Improving Harrow's attractiveness to the office market.
- 3.35 One of the opportunity sites within the Action Plan area - the former Kodak site - has already reached planning stage and includes permission for up to 2,171 sq.m of class A1 floorspace, the majority of which will be accounted for by a new foodstore.
- 3.36 A number of soft regeneration initiatives are also underway in the town centre, including public realm and environmental improvements to pedestrianised areas, with new pavements, surfaces, benches, planting, signage and lighting. These have been funded by the Mayor's Outer London Fund, matched with £1m of funding from Harrow Council.

Harrow's influence over the survey area

- 3.37 Harrow's close proximity to the north-western boundary of Brent means it exerts a considerable influence over the comparison goods shopping patterns of much of the survey area. The 2008 Study identified that Harrow town centre attracted 8.7% of comparison goods spend from the study area. Based on the new household survey, Harrow currently draws £145.23m of comparison goods spend from the survey area, equivalent to 8.7% of total available comparison goods spend – in other words, its market share from the survey has remained unchanged since the 2008 Study.
- 3.38 Harrow's influence over the survey area extends solely to the western band of survey zones, drawing its highest market share from zone 2 (Kenton, 29.5%), zone 1 (Wembley, 25.1%) and zone 3 (Burnt Oak, 16.6%), plus a 8.1% market share from zone 9 (Greenford). Harrow does not attract a market share of more than 5% from any other zone, and from zones 6, 7 and 8 its market share is under 1% (**Figure 3.4**).



Figure 3.4 | Harrow comparison goods catchment plan



source: household survey results (see Appendix 1, Table 4)

3.39 Public transport links between Harrow and key Brent centres are strong. Harrow-on-the-Hill station is centrally-located within Harrow town centre and is accessible on the Metropolitan Line via Wembley Park. Harrow & Wealdstone (Bakerloo Line/national rail) is located to the north of the town centre and provides direct links to Willesden, Harlesden, Wembley Central and Kenton. A number bus links run between Wembley and Harrow, including routes 223 (via Kenton) and 483.

Shepherd's Bush (including Westfield London)

3.40 A major change in the network of competing centres since the Council's previous Retail Study is the elevation in status of Shepherd's Bush as a shopping destination on account of the opening of the Westfield London (WL) development in October 2008. The household survey undertaken in support of this study provides the first opportunity for assessment of the influence of Shepherd's Bush / WL over residents in Brent, as it was not trading at the time of the Council's previous study. The boundary of Shepherd's Bush town centre has been extended to incorporate WL, and the opening of WL led to Shepherd's Bush subsequently being classified as a Metropolitan Centre in the London Plan. This classification has been carried forward into the Draft London Plan which also identifies potential for Shepherd's Bush to be reclassified as a highest-tier 'International' centre in future London Plan publications.

Review of retail and leisure offer in Shepherd's Bush

3.41 The offer at WL is virtually entirely devoted to national/international multiple retailers. The centre is anchored by three department stores - Debenhams, House of Fraser and Marks & Spencer - with a fourth (John Lewis) recently opening as part of an extension to the centre (see below). Much of the retail offer in the centre is fashion-led, with large branches of popular 'high street' fashion retailers such as Zara, Bershka, Topshop/Topman, All Saints, H&M and so on all present, along with brands such as Levi's, Cath Kidston, Jack Wills and The North Face. These sit alongside a number of more premium brands such as Hobbs, Jigsaw, Cos and Whistles. WL is also home to 'The Village', a luxury mall designed to cater for visitors seeking a more upmarket offer. This includes representation from upmarket fashion stores such as Gucci, Prada and Versace.



- 3.42 As well as its wide-ranging comparison goods retail offer, WL also acts as a leisure and social destination, containing a 17-screen Vue cinema, 'Kidzania', marketed as 'the UK's first educational entertainment experience, where children can learn real life skills in a 75,000 sq.ft child-size city', a Gymbox gym and a wide variety of cafes, restaurants and bars.
- 3.43 Elsewhere in Shepherd's Bush the retail offer is more limited and orientated towards day-to-day shopping and services. The W12 Centre includes stores such as Argos and Poundland, for example, alongside a second Vue cinema. There is a large market situated to the western end of the centre. The O2 Shepherd's Bush Empire and Bush Hall are both popular gig venues which contribute to the night-time economy of the area.

Recent and planned investment in Shepherd's Bush

- 3.44 A 'Phase 2' extension to WL opened in March 2018, taking the total number of units in the centre to c. 450, and the total sales area of the shopping centre to approx. 2.6million sq.ft (c. 250,000 sq.m). The extension is anchored by a 6,500 sq.m Primark store and a 21,300 sq.m John Lewis department store, a 'European flagship' H&M store as well as a new restaurant wing. There is also a substantial residential component to the extensions, with approx. 1,500 new homes forming part of the wider development. WL Phase 2 forms a major component of the wider White City Development area, also including the redevelopment of the BBC headquarters on Wood Lane and a new campus for Imperial College.



CGI of Westfield London Phase 2

- 3.45 Elsewhere in Shepherd's Bush, the formerly vacant Morrisons store in the W12 Centre has recently been reoccupied by a Lidl supermarket, improving the 'day to day' shopping function of this part of the centre. In April 2018, Old Market Yard opened as an extension to Shepherd's Bush Market. Constructed in 72 shipping containers, the market provides space for a wide range of street food traders, alongside a community space for workshops and events. The opening of Old Market Yard reflects a trend seen across a number of centres in London (and elsewhere in the UK) for 'street

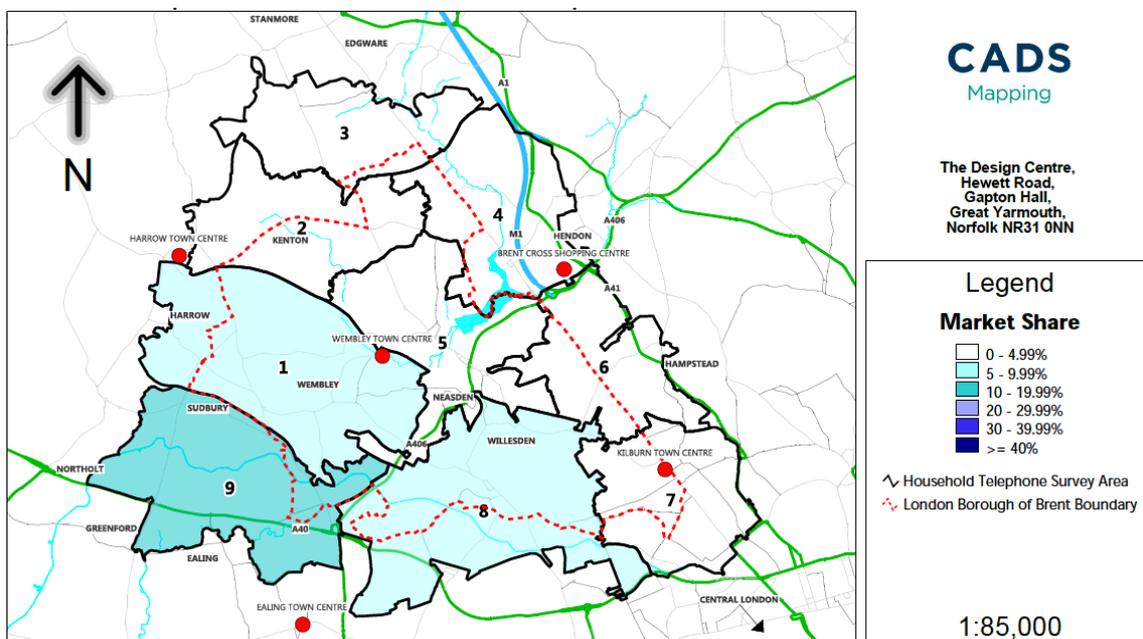


food'-based socialising spaces, a concept which will also be introduced to Wembley later in 2018 through the opening of Boxpark Wembley.

Shepherd Bush's influence over the study area

- 3.46 Shepherd's Bush draws £78.85m of comparison goods spend from the study area, equivalent to 4.8% of total comparison goods spend available to the study area. In the 2008 Study (prior to the opening of WL), Shepherd's Bush drew virtually no comparison goods spend from the survey area.
- 3.47 Shepherd's Bush's influence over the survey area as a whole is, however, relatively limited; it draws less than a 10% market share from 8 of the 9 survey zones, and of these in four zones its market share is under 1% (**Figure 3.5**). Most of its market share from within the survey area comes from zone 9 (Greenford, 15.5% market share) and zone 8 (Harlesden & Willesden, 9.9% market share). The enhancement of the retail offer to include the new John Lewis store may result in some further market share being taken from the survey area, but we would expect this to be at the expense of other competing destinations (e.g. Brent Cross) rather than from loss of market share from centres within Brent.

Figure 3.5 | Shepherd's Bush (including Westfield) comparison goods catchment plan



source: household survey results (see Appendix 1, Table 4)

- 3.48 Shepherd's Bush does not benefit from the same level of accessibility as central London from the study area, but is accessible via direct London Overground services from Willesden Junction (which interchanges with the Jubilee Line) and Kensal Rise. A number of bus services also link the centre with locations in Brent, including route 220 (Willesden - Wandsworth via Harlesden), 228 (Central Middlesex Hospital - Maida Hill via Harlesden and Willesden), 260 (Golders Green - White City via Cricklewood, Willesden and Harlesden) and 316 (Cricklewood - White City via Kilburn and Queen's Park; this route was extended from North Kensington in 2008 to provide residents in Brent a direct connection to WL).

Other competing destinations

- 3.49 The shopping destinations listed in Table 3.1 represent the most popular destinations for comparison goods shopping for residents of the survey area. Beyond this, there are a number of further



destinations surrounding the survey area which account for smaller – but not insignificant – amounts of comparison goods spend:

- **Edgware** draws £39.24m of comparison goods spend from the survey area (2.4% of total comparison goods spend available to the survey area), including a 21.0% market share from zone 3 (Burnt Oak).
- **Watford** draws £29.66m of comparison goods spend from the survey area (1.8% of total available comparison goods spend to the survey area), although it does not attract a market share of more than 10% from any zone. Its highest market shares are from zone 3 (Burnt Oak, 9.4%) and zone 2 (Kenton, 7.6%). Watford's influence as a comparison goods shopping destination over the survey area has decreased since the 2008 Study, when it accounted for 3.2% of total available comparison goods spend.
- **Greenford** draws £28.63m of comparison goods spend from the survey area, 1.8% of total available comparison goods spend to the survey area. Greenford's catchment is restricted to zone 9 of the survey area, from where Greenford draws a 18.3% market share. From the other eight survey zones, its market share is under 1%. The £28.63m of spend is accounted for by Greenford town centre and Westway Cross Shopping Park, a major out-of-centre shopping destination which includes a number of 'high street' retailers.
- **South Ruislip** draws £24.11m of comparison goods spend from the survey area, 1.5% of total available comparison goods spend to the survey area. Its highest market share is 8.3% from zone 9 (Greenford).
- **Ealing** draws £20.92m of comparison goods spend from the survey area, 1.3% of total available comparison goods spend to the survey area. Again, its influence is restricted to zone 9 (Greenford), from where it draws 11.9% market share. Ealing's market share from the survey area has halved since the 2008 Study (2.6% market share from the survey area), which is likely to be attributable to the opening of WL.

Old Oak & Park Royal

- 3.50 The Mayor of London has established the Old Oak and Park Royal Development Corporation (OPDC) to drive forward the regeneration of the Old Oak and Park Royal Opportunity Area, focussed around the proposed High Speed 2 and Crossrail interchange. The London Plan (2015) identifies Old Oak as an opportunity area with capacity for a minimum of 24,000 new homes and 55,000 new jobs; Park Royal has capacity for 1,500 new homes and 5,000 new jobs.
- 3.51 The regeneration of Old Oak Common will deliver a major new residential and employment area immediately adjacent to the western boundary of Brent. The OPDC area will include a new town centre – Old Oak High Street - and neighbourhood town centres at North Acton, Park Royal and Atlas Junction. The DLP identifies potential for Old Oak Common to be a future 'Major' town centre in the London Plan centre hierarchy. A total of 68,500 sq.m of class A1-A5 floorspace is proposed to be delivered in the OPDC, including 31,250 sq.m class A1 retail floorspace. The majority of the floorspace will come forward in the potential 'Major' centre at Old Oak High Street, with the neighbourhood centres serving more localised/day-to-day shopping needs (**Figure 3.6**).



Figure 3.6 | Proposed class A1-A5 floorspace within OPDC

	A1 retail	A1 service and A2	A3, A4 and A5	Total
Old Oak High Street (including within Old Oak Station)	27,250	14,000	16,000	57,250
North Acton	2,000	1,750	1,000	4,750
Park Royal Centre	500	1,500	1,000	3,000
Atlas Junction	1,500	1,000	1,000	3,500
Total	31,250	18,500	19,250	68,500

Source: OPDC Local Plan

- 3.52 A Retail and Leisure Needs Study was undertaken in support of the OPDC Local Plan, and was published for consultation in February 2016. This included an impact assessment, identifying where the proposed floorspace with the OPDC (as summarised above) would divert turnover from, and the resultant impact which will arise on existing centres surrounding the OPDC.
- 3.53 The impact assessment identified that both Wembley and Harlesden town centres could be expected to experience some comparison goods trade diversion to new floorspace in ODPC, as well as trade diversion from their in-centre foodstores. Other foodstore locations identified which will experience trade diversion include Sainsbury’s at Alperton and Tesco Extra at Brent Park.
- 3.54 The impact assessment identifies that there is scope for Harlesden town centre’s vitality and viability to benefit from the developments within the OPDC, but this will require improvement to physical and functional linkages between Harlesden and the OPDC area to be improved. It advises that:

‘Major regeneration plans could have wider spill-out effects that result in the demographic structure and retail composition of Harlesden changing over time. Therefore, it is important to ensure that the benefits of improved linkages are properly captured... the challenge will be ensure Harlesden properly benefits from the development.’



4 |

The network of centres

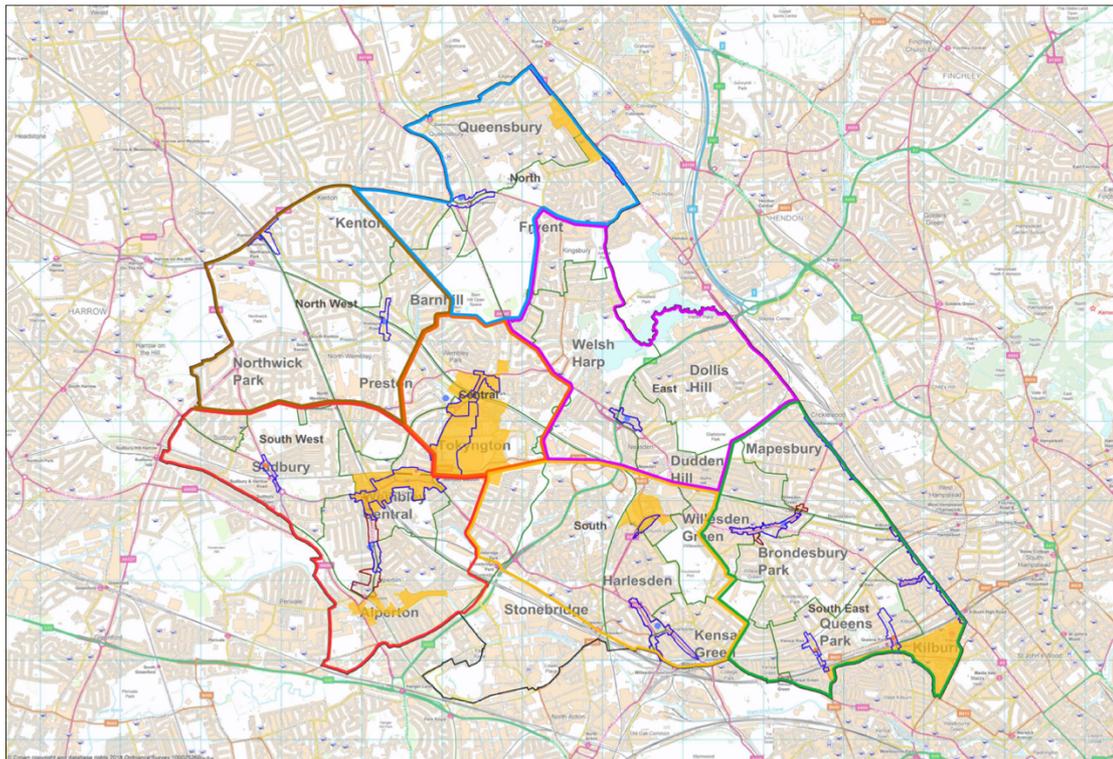


4. The network of centres

- 4.1 In this section, we present a brief overview of the network of town, district and local centres across the Borough which act as the principle locations for residents' shopping and services. We also identify the key out-of-centre shopping locations which also play an important role in meeting shopping needs. The analysis below provides a headline overview of the role and function of each of the centres, and a full analysis of the retail and leisure offer of each centre and its current vitality and viability is provided in the accompanying Brent Town Centres Health Check Assessment report which forms Document B to this evidence base study.
- 4.2 Reflecting the approach which will be taken by the Council in developing strategies for the different parts of the Borough in the preparation of their replacement Local Plan, we have divided the Borough into seven sub-areas. These are listed below, together with the centres which fall within each sub-area.
- **Central Brent** – Wembley Park (district centre)
 - **North West Brent** – Kenton (district centre), Preston Road (district centre)
 - **North Brent** – Burnt Oak (district centre), Colindale (district centre), Kingsbury (district centre)
 - **East Brent** – Neasden (district centre)
 - **South East Brent** – Kilburn (major centre), Cricklewood (district centre), Willesden Green (district centre), Kensal Rise (local centre), Queen's Park (local centre)
 - **South Brent** – Harlesden (district centre), Church End (local centre)
 - **South West Brent** – Wembley (major centre), Ealing Road (district centre), Sudbury (local centre)
- 4.3 A plan showing the sub-areas (alongside defined town centre boundaries) is shown at Figure 4.1. We also use these sub-areas as the basis of our assessment of quantitative retail and class A3/A4 need, set out in Sections 6 and 7.



Figure 4.1 | Brent sub-areas



Source: Brent Council

Central Brent sub-area – Wembley Park

- 4.4 **Wembley Park** is identified as a District Centre within the Local Plan. The town centre encompasses a number of service uses, including the highest proportion of night time economy uses, and one of the highest proportions of betting shops of all town centres in Brent (likely a reflection of its proximity to Wembley Stadium). Wembley Park station (Jubilee) lies at the heart of the town centre. Wembley Park has one of the lowest vacancy rates in Brent, with only 2% of units currently being vacant.
- 4.5 Also falling within the Central Brent sub-area is the London Designer Outlet (LDO), which is positioned midway between Wembley Park district centre and Wembley town centre, adjacent to Wembley Stadium. The LDO opened in 2013 and contains 30,500 sq.m of retail and leisure floorspace, including outlet versions of major retailers such as Nike, Adidas, H&M, M&S and Vans, selling past-season/clearance stock. The development also contains a nine-screen Cineworld cinema and a wide range of café/restaurant operators.
- 4.6 Also positioned at each end of Wembley Park is the Stadium Retail Park and an Asda supermarket (net sales area 6,004 sq.m). There are two Lidl stores serving Wembley Park – one at the Stadium Retail Park and a second, more modern store on Blackbird Hill.

North West Brent sub-area – Kenton and Preston Road

- 4.7 **Kenton** is identified as a District Centre within the Local Plan. The town centre is shared with LB Harrow, although the majority of the town centre lies within Brent. Kenton is located within one of the least deprived areas in Brent, and has a relatively high proportion of service units relatively to other town centres in Brent. Key anchors in Brent include a large Sainsbury's store, which falls within the town centre boundary but has poor connectivity with the wider offer of the centre, and Kenton Bridge Medical Centre. Kenton Underground & Overground station is also located in the town centre



boundary. Around 7% of units are currently vacant in Kenton, similar to the average vacancy rate across Brent's town centres.

- 4.8 **Preston Road** is identified as a District Centre within the Local Plan. The town centre lies in one of the lesser deprived areas in Brent, and has relatively low vacancy rate (4%) compared to borough-wide levels. The main anchors in the centre are small Tesco Express and Co-Op supermarkets. Preston Road Underground station is also located in the town centre boundary. Preston Road has the joint highest proportion of class A5 (hot food takeaway) uses in Brent's town centres, with 7% of floorspace (890 sqm) occupied by this use. These units are clustered south of the Preston Road Station.

North Brent sub-area – Burnt Oak, Colindale and Kingsbury

- 4.9 **Burnt Oak** is identified as a District Centre within the Local Plan. The town centre is shared between Barnet and Harrow, with Brent's portion being the smallest. Retailers present in the centre include Iceland, Poundland and Peacocks. Currently 14% of units are vacant in the town centre, one of the highest vacancy rates of all of Brent's town centres.
- 4.10 **Colindale/The Hyde** is identified as a District Centre within the Local Plan. The town centre is shared with Barnet. The main shopping frontage largely consists of smaller service shops (with the highest proportion of service units of Brent's town centres), with larger convenience and comparison stores located just to the north of the town centre. Currently 7% of units are vacant in the town centre, similar to the average vacancy rate for Brent's town centres.
- 4.11 **Kingsbury** is identified as a District Centre within the Local Plan. The town centre is shared with Harrow, although the majority of the town centre lies within Brent. Kingsbury has a relatively high proportion of convenience goods floorspace, one of the highest out of all of Brent's town centres. The town centre also has one of the lowest vacancy rates of all of the town centres in Brent, with 3% of units currently vacant. Kingsbury's key anchors stores (within Brent) include Tesco Express and Aldi, with an Iceland located in Harrow. Kingsbury Underground station lies within the town centre boundary. The household survey results identify that Kingsbury has a particularly important role and function as a centre for ethnic food retailing.



Bang Bang Oriental, Colindale



- 4.12 To the north of Colindale district centre (outside the defined centre) is an area of retail warehousing and large supermarkets, including Colindale Retail Park (Matalan, Go Outdoors, Carpetright, Harveys, Dreams), a large Asda supermarket (4,839 sq.m net sales), and adjacent to this a new Morrisons supermarket which commenced trading in 2016, on part of the site of the former Oriental City food shopping complex. A condition to the granting of planning permission for the redevelopment of the site was that the remainder of the parcel of land (30,000 sq.ft) would continue to be used for the sale of specialist Far Eastern and Oriental goods. To this end, a new covered food hall – Bang Bang Oriental – with space for 33 kiosks and 450 diners – opened in 2017.

East Brent sub-area - Neasden

- 4.13 **Neasden** is identified as a District Centre within the Local Plan. Key anchors include a Tesco Express and Home Decor. The town centre is prominently located to the south of the North Circular, with a small area to the north. Neasden has one of the higher vacancy rates in Brent, with 12% of units currently vacant. There is 850 sqm of A5 floorspace in Neasden, which represents 6% of total floorspace. This is higher than the average proportion of space used for A5 in Brent. The majority of these uses are located on the northern side of Neasden Lane. Neasden also has one of the highest percentages of units in use for class A2 uses, at 15% of the total.

South-East Brent sub-area – Kilburn, Cricklewood, Willesden Green, Kensal Rise and Queen’s Park

- 4.14 **Kilburn** is identified as a Major Centre within the Local Plan. The centre falls between the administrative boundaries of Brent (western side of Kilburn High Road) and Camden (eastern side). Key anchors in the centre include Primark, M&S Foodhall, Sainsbury’s (plus a second Sainsbury’s Local store), Poundland, Aldi and Argos. The centre is particularly well connected with Kilburn (Jubilee Line) and Brondesbury (Overground) stations are included in the Brent town centre boundary, with Kilburn High Road (Overground) located in Camden, and Kilburn Park (Bakerloo) located 200m outside the town centre boundary. 4% of units in the centre are given over to A5 uses, below the average for the Borough.
- 4.15 **Cricklewood** is identified as a District Centre within the Local Plan. The town centre is shared between Barnet and Brent in roughly equal portions. Key retailers within the centre include two Co-Op stores, Argos and Tesco Express. There are several retail parks around the town centre, including Broadway Retail Park, containing a large B&Q store, and Wickes & Matalan located north of the town centre. Cricklewood town centre lies 2 miles from Brent Cross Shopping Centre. Cricklewood has a slightly higher vacancy rate than average across Brent’s town centres, with 8% of units vacant..
- 4.16 **Willesden Green** is identified as a District Centre within the Local Plan, and has a retail offer anchored by a Sainsbury’s supermarket, although the vast majority of the centre comprises of independent retailers. Willesden Green has one of the highest vacancy rates of all town centres in Brent. Willesden Green station (Jubilee) is located just outside the edge of the town centre boundary. Willesden Green has a noticeably high proportion of class A2 units within the centre, with these uses accounting for 15% of all units. Most of these units are located towards the eastern end of the town centre.
- 4.17 **Kensal Rise** is identified as a Local Centre within the Local Plan. The majority of the shops on the high street are smaller service shops, but there are a few key anchor retailers, including two Tesco Express stores. Kensal Rise (Overground) station is located within the town centre boundary. Kensal Rise has one of the lowest vacancy rates of town centres in Brent, with around 5% of units vacant. It is also home to one of only two independent cinemas in the Borough.



- 4.18 **Queen's Park** is identified as a Local Centre within the Local Plan. Key anchors include a recently-opened M&S Foodhall, Sainsburys Local and WHSmith. Queen's Park has one of the lowest vacancy rates of all the town centres in Brent, and partly reflects the proximity of the town centre to Central London. The centre has a noticeably upmarket retail offer, with a number of boutique shops and specialist food retailers in the centre, as well as a strong 'café culture' and a number of pubs. Queen's Park station (Bakerloo & Overground) is located inside the town centre boundary.



Queen's Park

- 4.19 There is relatively little in the way of retail warehousing in this sub-area, with the exception of a large B&Q store which sits adjacent to (but outside the defined frontage of) Cricklewood town centre.

South Brent sub-area – Harlesden and Church End

- 4.20 **Harlesden** is identified as a District Centre within the Local Plan. Key anchors include Tesco Metro, Iceland, Argos, Poundland, Burger King and KFC. Willesden Junction (Overground, Bakerloo) lies just outside of the town centre boundary. Harlesden is located in one of the most deprived parts of the borough, and has a higher vacancy rate than average. 6% of units in Harlesden town centre are given over to class A5 uses, above the average for the Borough. There are clusters in the north of the town centre and at the corner of High Street Harlesden and Park Parade.
- 4.21 **Church End** is identified as a Local Centre within the Local Plan. The town centre largely consists of service uses, and has the highest vacancy rate in Brent (16%). This partly reflect the high deprivation levels of local residents in the area. Key anchors include TBN Studios, with a large B&M Home Stores and Willesden Magistrates Court located just outside the town centre boundary. A new square for the Church End market will provide approximately 50 new market stalls for vendors and provide a new central focus for the town centre. 7% of units in Church End are occupied by class A5 retailers, the joint highest proportion of any centre in the Borough (along with Preston Road).
- 4.22 Also falling within the South Brent sub-area is a branch of IKEA at Brent Park, adjacent to the North Circular south of Neasden town centre. Adjacent to this is a Tesco Extra supermarket. Neither store falls within a defined centre.



South West Brent sub-area – Wembley (Central), Sudbury and Ealing Road

- 4.23 **Wembley** is identified as a Major Centre within the Local Plan. Key anchors include Argos, TK Maxx, Primark, Poundland, Wilko and Sports Direct, in addition to those at the London Designer Outlet (discussed as part of Wembley Park, above). Currently 10% of units in the town centre are vacant, higher than average across Brent's town centres. Alongside wider residential and commercial development across Wembley, the Wembley Housing Zone will deliver an extra 651 homes adjacent to the High Street, and will help to link up the regenerated area around Wembley Park to Wembley High Road with a better walking route. 3% of units in Wembley town centre are given over to class A5 uses, lower than the average for the Borough.
- 4.24 **Ealing Road** is identified as a District Centre within the Local Plan. The high street largely consists of small independent comparison stores, becoming a well-known Asian destination shopping area, with large numbers of fashion, jewellery and food & drink units. Currently Ealing Road has a lower vacancy rate than other town centres in Brent, with just 5% of units vacant.
- 4.25 **Sudbury** is identified as a Local Centre within the Local Plan. The town centre largely consists of smaller units, with the main anchor being a Tesco Express. The town centre has an average vacancy level (8%) relative to other town centres in Brent, and has one of the highest proportions of night-time economy uses (behind only Wembley Park). Sudbury & Harrow Road rail station (on the Chiltern Main Line) is located within the town centre boundary, with Sudbury Town tube station located 400m further south.
- 4.26 In terms of out-of-centre retailing, there is relatively little within this sub-area with the exception of a standalone Sainsbury's store on Ealing Road in Alperton (net sales area 4,080 sq.m) and a Currys PC World store also located on Ealing Road in Alperton.



5 |

Shopping patterns



5. Shopping patterns

- 5.1 In this section we review the findings of the household telephone survey in respect of the shopping patterns for comparison (non-food) goods and convenience (food) goods. The household survey findings tell us where residents are travelling to, both within and outside the survey area, for their spending on these types of goods. It also enables us to calculate a 'retention rate' of how much spending is retained in the Borough. These outputs inform our quantitative retail needs forecasts which are set out in the following section. The household telephone surveys were completed across the area shown in Figure 1.1 at the start of this report.
- 5.2 For comparison goods, the household telephone surveys asked where respondents visit for the following types of comparison goods shopping: clothing and footwear; furniture, floor coverings and household textiles; DIY and decorating goods; domestic appliances; audio-visual equipment; personal and medical goods; and recreational and luxury goods. Shopping patterns for each of these types of comparison goods are then combined to produce a 'composite' set of comparison goods shopping patterns, using weighted averages of the household survey responses for each goods type based on the proportion of personal spending ('expenditure per capita') available to residents in the survey area, as provided by Experian.
- 5.3 For convenience goods, the household telephone survey included questions on 'main food' and 'top-up food' shopping. The results of the two types of food expenditure were then merged through the application of a weight which reflects the estimated proportion of expenditure accounted for by each goods type (70% 'main' food / 30% 'top-up' food¹⁷). This forms a 'composite' pattern of convenience spending, expressed as a market share for each destination centre or foodstore for each survey zone.
- 5.4 Questions were separately asked about where residents travel to for shopping for specialist ethnic / world food and non-food products, and whether they visited markets.

Comparison goods shopping patterns

- 5.5 The shopping patterns derived from the household telephone survey enable us to calculate the amount of comparison goods expenditure which is spent in each centre within and surrounding the survey area. The total amount of expenditure retained in the survey area is known as its 'retention rate'; expenditure which is spent outside the survey area is known as 'leakage'.
- 5.6 It is important to remember that survey areas rarely retain all of the comparison goods expenditure which is available to them – and in the case of Brent, the presence of major retailing destinations such as Brent Cross and higher-order shopping destinations such as Harrow and Central London a short distance outside the survey area boundary means loss of comparison goods spend is inevitable. The comparison goods retention rate for the survey area is summarised in **Table 5.1**, and shows that **61.8% of available comparison goods expenditure is retained within the survey area** – this is a noticeable increase from the retention rate of 51.2% identified in the 2008 study.
- 5.7 This retention rate is, however, skewed by the inclusion of Brent Cross within the survey area boundary, and Table 5.1 shows that, if solely considering the comparison goods turnover of centres and stores within Brent, the retention rate reduces to 28.6%.

¹⁷ Based on our experience elsewhere, this represents a suitable split between 'main' and 'top up' food shopping.



Table 5.1 | Comparison goods expenditure retention in Brent, 2018

	£m	% of total
Total comparison goods spend available to survey area	£1,660.73m (£1.66bn)	100.0%
Spending in all centres in survey area	£1,026.48m (£1.03bn)	61.8%
- of which, Spending in Brent town, district and local centres	£348.19m	21.0%
- of which, Spending in other locations in Brent (e.g. retail parks, non-food sales in large supermarkets)	£126.47m	7.6%
- Total comparison goods spending in Brent	£474.66m	28.6%
Spending in locations outside Brent (e.g. Brent Cross, Harrow, C. London)	£1,186.08m (£1.19bn)	71.4%

- 5.8 We have set out in Section 3 (Table 3.1) that Brent Cross is the most popular comparison goods shopping destination for residents in the survey area, drawing £523.20m of comparison goods spend, almost one-third of total available comparison goods spend. This is followed by Central London and Harrow, which draw £177.44m and £145.23m of comparison goods spend respectively. We also set out that Kilburn has the highest comparison goods turnover of any centre in Brent, drawing £99.60m of comparison goods spend.
- 5.9 In **Table 5.2**, we expand on the analysis in Table 3.1 to also show the comparison goods turnover of the district and local centres in Brent. Table 5.2 shows that, Kilburn and Wembley aside, Brent’s other centres have lower comparison goods turnovers; this reflects the fact that many of the district centres they have a more localised shopping function which is more orientated towards meeting day-to-day shopping needs rather than being non-food shopping ‘destinations’. However, three district centres (Harlesden, Kingsbury and Cricklewood) have comparison goods turnovers in excess of £20m, a reflection that in these cases, the comparison goods offer in the centres is more substantial.
- 5.10 Following Table 5.2, we then proceed to review the comparison goods shopping catchments of each of Brent’s centres in further detail.



Table 5.2 | Comparison goods turnover of town, district and local centres in Brent, 2018

	Comparison goods floorspace (sq.m net)	Comparison goods turnover, 2018 (£m)	Comparison goods market share from survey area, 2018 (%)	Comparison goods market share from survey area, 2008 (%)
Major centres				
Kilburn	14,672	99.60	5.8%	5.3%
Wembley	13,686	48.11	2.9%	4.8%
District centres				
Wembley Park (incl. LDO)	11,432	28.72	1.7%	0.7%**
Harlesden	9,592	25.59	1.5%	0.6%
Kingsbury	2,960	23.66	1.4%	0.8%
Cricklewood	10,144	22.21	1.3%	4.3%*
Willesden Green	5,753	18.67	1.1%	2.6%
Colindale / The Hyde	1,137	13.09	0.8%	0.8%
Kenton	4,153	9.20	0.6%	n/a
Burnt Oak	7,708	8.82	0.5%	1.2%
Neasden	1,460	8.05	0.5%	0.4%
Preston Road	1,202	6.57	0.4%	n/a
Ealing Road	3,686	6.55	0.4%	n/a
Local centres				
Queens Park	625	21.29	1.3%	n/a
Kensal Rise	1,785	5.93	0.4%	n/a
Church End	260	0.73	0.0%	n/a
Sudbury	592	1.40	0.0%	n/a

Source: Tables 5a & Table 6, Appendix 1 for floorspace & 2018 turnover data. 2008 data sourced from Brent 2008 Retail Study Update (Roger Tym & Partners), Appendix 3, Table 5. Notes: *difference in market share likely to be a result of inclusion of B&Q/retail park stores in 2008 figure. **LDO not trading in 2008

Kilburn town centre

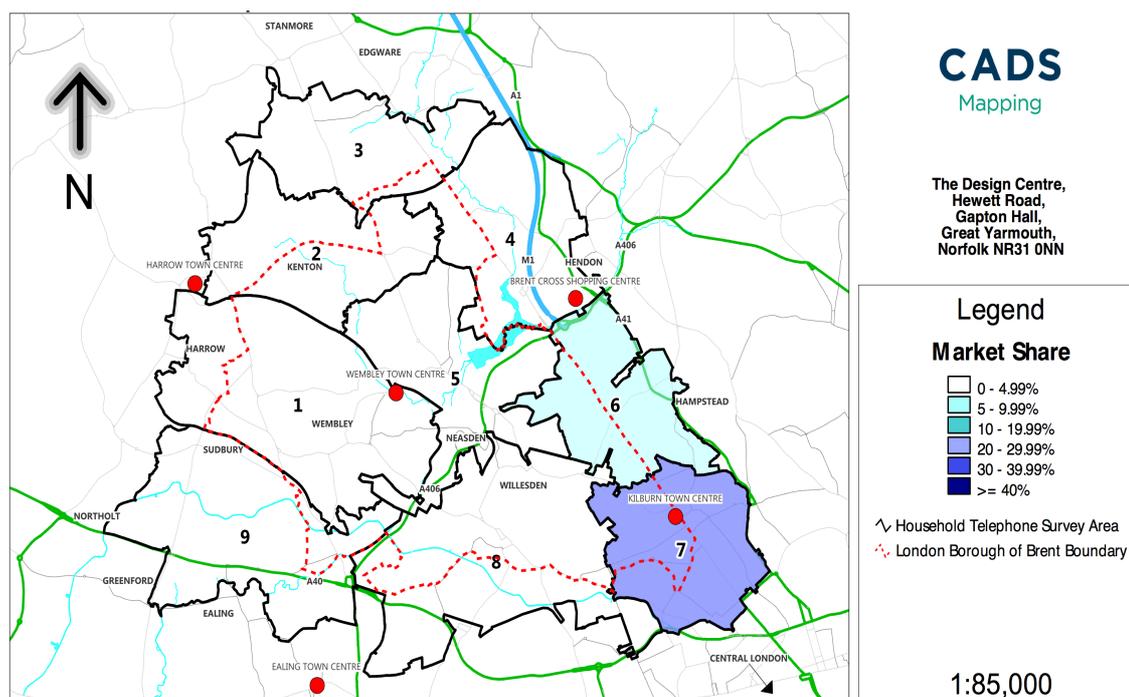
- 5.11 Kilburn has a comparison goods turnover of £99.60m, the highest comparison goods turnover of any of Brent’s centres, equivalent to 6.0% of total available comparison goods spend. Kilburn falls within zone 7 of the survey area, and the household survey results identify that Kilburn’s catchment is largely confined to this survey zone. Kilburn draws a 23.6% market share from its local zone, zone 7, but its influence beyond this is limited to a 4.4% market share from zone 6 (Cricklewood) and a 1.1% market share from zone 1 (Wembley). Positively, the proportion of comparison goods expenditure which Kilburn retains from its local zone has increased from the 2008 Study, when it captured 5.3% of



the available market share, suggesting the offer of the town centre has remained resilient in the face of the pressures to comparison goods shopping patterns which this study has identified¹⁸.

- 5.12 Kilburn’s main competition for comparison goods spend is from central London, with strong Underground connections (Jubilee Line) and bus connections (routes 16, 98 run direct to Oxford Street via the A5); Central London captures 29.4% of the market share from residents in zone 7. A further 17.7% goes to Brent Cross / Staples Corner.

Figure 5.1 | Kilburn comparison goods catchment plan



Source: household survey results

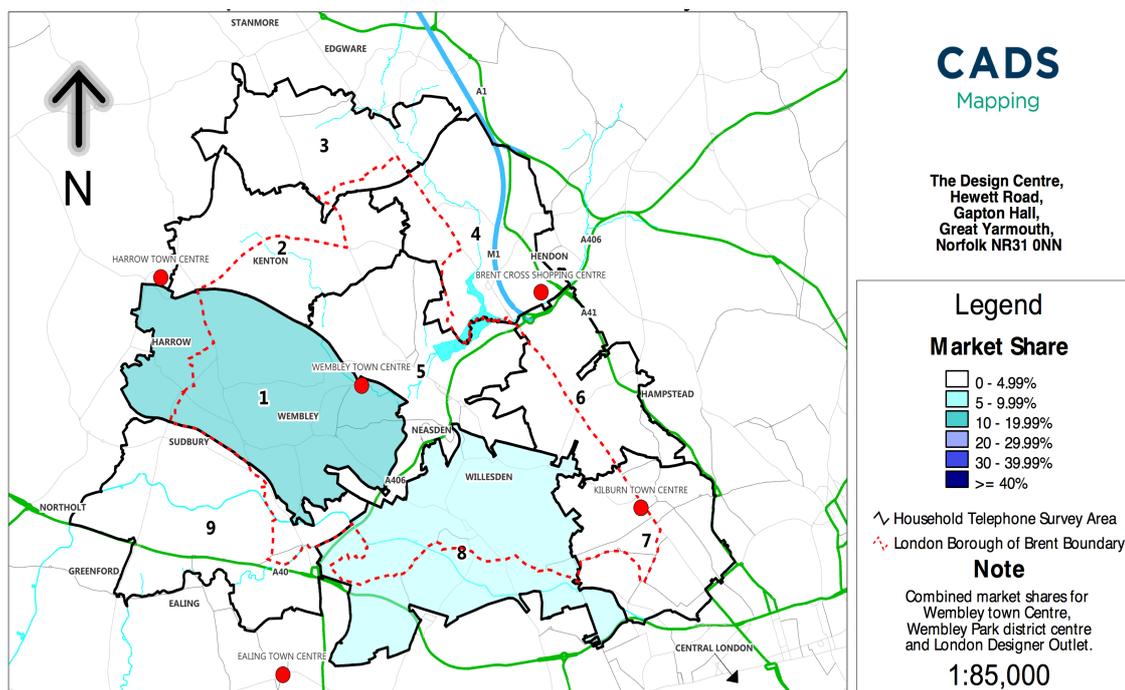
Wembley town centre

- 5.13 Wembley is the second of the Borough’s major centres, and falls within zone 1 of the survey area. Its comparison goods turnover is £48.11m, approximately half of than Kilburn’s comparison goods turnover, but is the second-highest comparison goods turnover of any of Brent’s centres. Wembley town centre accounts for just 2.9% of total available comparison goods spend available to the survey area, meaning the proportion of comparison goods spend captured by Wembley town centre from the survey area has more than halved (in percentage terms) since the 2008 Study.
- 5.14 Like Kilburn, Wembley’s catchment area is predominantly restricted to its ‘local’ zone of zone 1, from where it draws a market share of 11.7%. Further market share is drawn from zone 5 (Neasden, 4.2%) and zone 8 (Harlesden, 3.5%). Wembley’s comparison goods catchment is shown in **Figure 5.2**.

¹⁸ Kilburn is located on the periphery of the survey area, however from reviewing retail evidence base documents from neighbouring authorities, it is apparent there is no comparison goods expenditure inflow from beyond the survey area.



Figure 5.2 | Wembley comparison goods catchment plan (including Wembley Park and LDO)



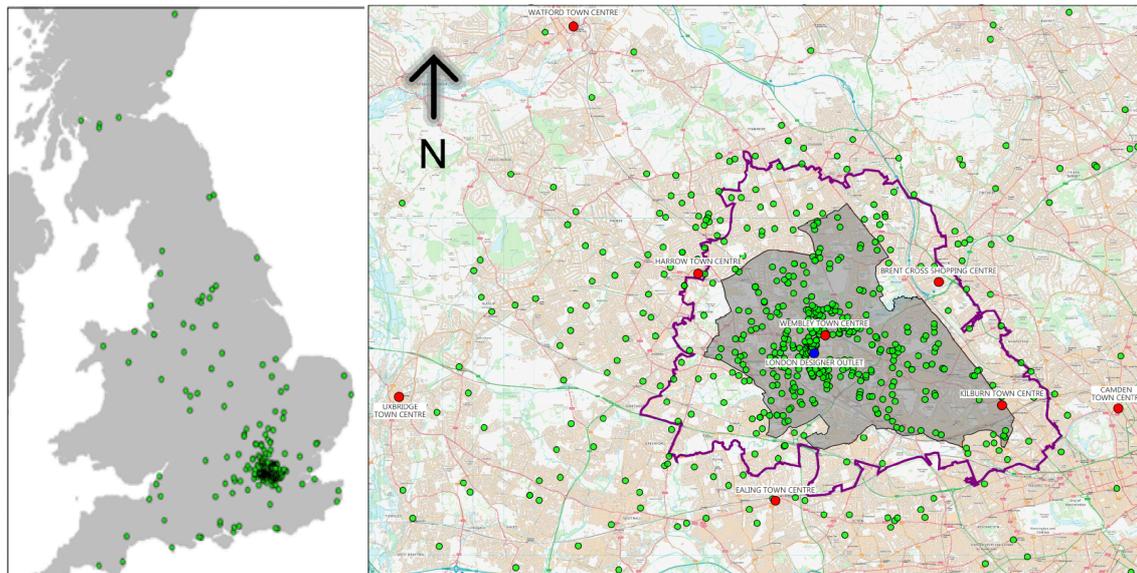
Source: household survey results

- 5.16 If the comparison goods turnovers of Wembley Park and the LDO are incorporated, Wembley's comparison goods turnover increases to £76.13m, equivalent to 4.6% of total available comparison goods spend, which is a reduction from the equivalent figure of 5.5% in the 2008 Study. The comparison goods turnover figure of £76.13m is a combined turnover covering Wembley town centre (£48.11m comparison goods turnover), Wembley Park district centre (£14.27m) and the London Designer Outlet (£14.45m). Wembley Park draws a market share of 3.9% from zone 1, and the LDO a market share of 1.9%. Wembley's total market share from its 'local' zone of zone 1 is therefore 17.5%.
- 5.17 Analysis of the household survey results shows that Wembley is having to compete for spend with a greater number of larger/higher order centres than Kilburn. 25.1% of comparison goods spend from residents in zone 1 (£54.43m) goes to Harrow; 12.5% (£27.05m) goes to Brent Cross; 7.1% (£15.34m) goes to Central London and 6.2% (£13.42m) goes to Shepherd's Bush. The latter expenditure flow is of particular significance, and shows that the opening of Westfield London has impacted on the shopping patterns of residents in the Wembley area.
- 5.18 The LDO draws £14.45m of comparison goods spend from the survey area, and is therefore making an important contribution to the overall turnover of Wembley town centre. It is important to note that Outlet centres typically operate with far wider catchment areas than 'traditional' town centres, and act as shopping and leisure 'destinations'. Using exit survey data (postcodes of the origin location of visitors to the LDO) supplied by Quintain, who operate the LDO, we have calculated that 46% of visitors to the LDO originate from within the survey area, and 54% travel from outside the survey area¹⁹, with the LDO's catchment extending further across north and west London, and some visitors being drawn from further across the country (Figure 5.3).

¹⁹ We have incorporated this 'inflow' of expenditure into our quantitative comparison goods retail capacity forecasts.



Figure 5.3 | London Designer Outlet visitor origin locations



Source: visitor origin postcode data provided by Quintain

District centres

5.19 The household survey results identify the following catchments for the district centres in the Borough:

- **Harlesden** has a comparison goods turnover of £25.59m, the highest comparison goods turnover of any district centre in the Borough. Harlesden falls within zone 8 and draws a 9.3% market share from this zone, but aside from a small market share from zone 4 (Colindale, 0.7%), does not draw trade from beyond its 'local' zone.
- **Kingsbury** has a comparison goods turnover of £23.66m, the second-highest comparison goods turnover of any district centre. Kingsbury falls within zone 2 and draws a market share of 5.7% from this zone, but also draws small market shares from a further five survey zones, including zone 5 (Neasden, 2.9%) and zone 4 (Colindale, 2.0%). This is a strong performance for a district centre, and might be a consequence of Kingsbury's important role and function as an ethnic food shopping destination (discussed below), which in turn is generating non-food spend in the centre.
- **Cricklewood** has a comparison goods turnover of £22.21m, which again we would consider to be a strong performance for a district centre. It draws a 7.4% market share from its 'local' zone, zone 6, plus a 3.3% market share from zone 5 (Neasden) and a 1.2% market share from zone 8 (Harlesden). This turnover figure does not include the retail park which sits adjacent to, but outside the boundary of, the town centre – this facility attracts a further £22.67m of comparison goods spend, largely on account of the presence of a B&Q, one of the few standalone DIY stores in the Borough.
- **Colindale / The Hyde** has a comparison goods turnover of £13.09m and draws market share from across four survey zones, including a market share of 2.4% from its 'local' zone (zone 4), plus a 2.5% market share from zone 2 (Kenton).
- **Kenton, Burnt Oak, Neasden, Preston Road and Ealing Road** all have comparison goods turnovers of under £10m and therefore do not perform a major role as comparison shopping destinations in the Borough's hierarchy of centres. None of the centres attracts a market share of more than 3% from their respective 'local' zones, confirming that the offer in these centres is more orientated towards day-to-day food shopping and local services.



- 5.20 In terms of the local centres, Kensal Rise and particularly Church End have low comparison goods turnovers, however this is to be expected in the context of their role and function as local centres. However it can be seen from Table 5.2 that Queens Park is performing strongly as a comparison goods destination, achieving a turnover of £21.29m, which is in excess of the majority of higher-order district centres. This is likely to be reflective of the more specialist/upmarket nature of the non-food offer in the centre, which enhances its appeal as a shopping 'destination' from beyond the immediate local catchment we would typically expect a local centre to draw trade from. Analysis of the market shares shows the centre to draw a 6.4% market share from its local zone (zone 7), which is a higher market share than we would typically expect a local centre to achieve.

Convenience goods shopping patterns

- 5.21 Convenience goods shopping is a more localised activity – generally, people are less willing to travel as far to undertake food shopping as they are for comparison goods shopping. All parts of the Borough and wider survey area are served by a variety of food shopping options, from large-format superstores, to small convenience-format stores, specialist independents and ethnic food shops. The location of larger-format superstores is more orientated towards the central and north of the Borough, where space is less at a premium, although there are a handful of larger superstores accessible by residents in the south of the Borough, such as the Sainsbury's store at Finchley Road (which falls outside the survey area).
- 5.22 Large supermarkets still account for, on average, over 50% of 'main/bulk' shopping trips and the findings of the household survey (discussed below) confirm that the most popular destinations for food shopping are superstores, most of which are not located with a defined centre. However, all of the Borough's town, district and local centres contain at least one national operator run-convenience goods store (e.g. Tesco Express, Co-Op, Sainsbury's Local etc), with some (e.g. Kilburn, Willesden, Kenton and Neasden) containing medium to large supermarkets which enable some 'main/bulk' food shopping trips to be met.
- 5.23 There is currently £1,213.45m (£1.21bn) of convenience goods spend available to the survey area. Of this, £916.85m (74.5%) is spent within main foodstores in the survey area. A further £35.78m (2.9%) is spent at local / specialist convenience goods shops in Brent's network of town, district and local centres. Adding these two figures together identifies that a total of £952.63m of convenience goods expenditure is retained in the survey area, equivalent to an overall convenience goods retention rate of 77.4%. In other words, over three quarters of available convenience goods expenditure is retained within the survey area (**Table 5.3**).
- 5.24 We consider this to be healthy level of expenditure retention, and one that suggests the majority of convenience goods needs are being met sustainably. This is also borne out in the fact that the remaining expenditure which 'leaks' outside the survey area does so to locations just outside the survey area boundary, for example to stores at Finchley Road (Sainsbury's, Waitrose), Edgware (Sainsbury's) or Stanmore (Sainsbury's).



Table 5.3 | Convenience goods expenditure retention in Brent, 2018

	£m	% of total
Total convenience goods spend available to survey area	£1,231.45m (£1.23bn)	100.0%
Spending in main foodstores in survey area	£916.85m	74.5%
Spending in local shops in survey area	£35.78m	2.9%
Total convenience goods spending in survey area	£952.63m	77.4%
Spending in locations outside Brent (e.g. Finchley Road, Edgware, Stanmore) / other	£278.82m	22.6%

Source: Table 5a, Appendix 2

5.25 The foodstores with the highest convenience goods turnover in the survey area are shown in **Table 5.4**.

Table 5.4 | Foodstores with highest convenience goods turnover in Brent, 2018

Foodstore	Convenience goods turnover from survey area (£m)	Sequential location (in/ edge/ out-of-centre)	Estimated net sales area (sq.m)
Asda, Wembley	89.01	Out	6,004
Asda, Colindale	74.92	Out	4,839
Morrisons, Queensbury	43.23	Out	2,926
Sainsbury's, Kilburn High Road	40.24	In	1,337
Sainsbury's, Alperton	38.02	Out	4,080
Sainsbury's, Kenton	33.92	In	3,763
Sainsbury's, Willesden Green	32.55	In	3,452
Tesco Extra, Brent Park	24.39	Out	4,903
Aldi, Kingsbury	22.27	In	1,104
Morrisons, Colindale	19.68	Out	3,754

Source: Table 5a, Table 6, Appendix 2

Convenience goods shopping patterns by zone

5.26 Table 5.5 shows the three most popular locations for convenience goods shopping in each of the survey zones which predominantly fall within Brent (i.e. zones 1 to 8). The table confirms that food shopping is, across the Borough, dominated by large out-of-centre supermarkets, particularly in the central and north of the Borough. Two foodstores have a particularly strong influence over shopping patterns and draw trade from across a number of survey zones – the Asda store in Wembley accounts for 24% of food shopping trips in zone 1 (Wembley), 25% of food shopping trips in zone 5 (Neasden) and 7% of food shopping trips in zone 6 (Cricklewood), whilst the Asda store in Colindale accounts for 19% of food shopping trips in zone 2 (Kenton), 24% of shopping trips in zone 3 (Burnt



Oak) and 19% of food shopping trips in zone 4 (Colindale). The 2008 Study also identified the Asda stores in Colindale and Wembley to attract strong cross-zone market shares.

5.27 Towards the south of the Borough, food shopping patterns become more dispersed across a wider range of foodstores, likely in part a reflection of the fact that there are fewer large out-of-centre supermarkets, meaning shoppers place greater reliance on smaller-format, in-centre supermarkets. For example, the most popular destination for residents in zone 7 (Kilburn), the Sainsbury’s store on Kilburn High Road, attracts a market share of 15%, whilst the most popular destination for residents in zone 8 (Harlesden), the large Sainsbury’s at Ladbroke Grove (which falls outside the survey area) attracts a market share of 14%.

Table 5.5 | Most popular convenience goods shopping destinations by zone, 2018

	Most popular foodstore	Second-most popular	Third-most popular foodstore
Zone 1 / Wembley	Asda, Wembley (21%)	Sainsbury’s, Alperton (10%)	Sainsbury’s, Kenton (9%)
Zone 2 / Kenton	Asda, Colindale (19%)	Morrisons, Queensbury (17%)	Sainsbury’s, Kenton (15%)
Zone 3 / Burnt Oak	Asda, Colindale (24%)	Morrisons, Queensbury (18%)	Sainsbury’s, Stanmore (8%)
Zone 4 / Colindale	Sainsbury’s, Hendon (22%)*	Asda, Colindale (19%)	Morrisons, Colindale (8%)
Zone 5 / Neasden	Asda, Wembley (25%)	Tesco Extra, Brent Park (7%)	Sainsbury’s, Hendon (6%)
Zone 6 / Cricklewood	Tesco, Brent Cross Hendon Way (24%)*	Lidl, Cricklewood (11%)	Asda, Wembley (7%)
Zone 7 / Kilburn	Sainsbury’s, Kilburn (15%)	Sainsbury’s, Ladbroke Gr (14%)*	Aldi, Kilburn (6%)
Zone 8 / Harlesden	Sainsbury’s, Ladbroke Gr (14%)*	Asda, Park Royal (12%)*	Sainsbury’s, Willesden (9%)

Source: Table 4, Appendix 2. *denotes store outside survey area

Foodstore trading performance

5.28 In Table 6 of Appendix 2, we have undertaken an assessment of the trading performance of the convenience goods floorspace in the Borough given over to major foodstores, in order to establish whether floorspace is trading in line with expected ‘benchmark’ levels (i.e. company averages for individual national operators). Table 6 of Appendix 2 shows that foodstores across the Borough are trading strongly, achieving an average sales density of £16,377 per sq.m. Whilst this reflects the fact that – as Table 5.5 shows – much of the Borough’s food shopping takes place in large-format supermarkets, it also indicates that these foodstores are, collectively, trading very strongly. The strong performance of the foodstore floorspace is confirmed by the fact that the convenience goods sales density for Morrisons, Sainsbury’s and Tesco is between £11,000 and £13,000 per sq.m (although Asda’s sales density is higher than this).

5.29 This above-average sales density reflects the fact that many of the Borough’s foodstores are ‘over-trading’ against company ‘benchmark’ levels. The over-trading is most pronounced in several of the Borough’s out-of-centre foodstores, most notably:

- Asda, Wembley (over-trading by £20.16m; convenience goods sales density £22,219 per sq.m)



- Asda, Colindale (over-trading by £19.41m; convenience goods sales density £23,106 per sq.m)
 - Morrisons, Queensbury (over-trading by £16.99m; convenience goods sales density £18,467 per sq.m)
 - Lidl, Cricklewood (over-trading by £12.28m; convenience goods sales density £23,567 per sq.m)
- 5.30 Within the network of town, district and local centres across the Borough, Table 6 of Appendix 2 shows that most foodstores are trading at above company average levels. In-centre stores which are trading particularly strongly include:
- Sainsbury's, Kilburn High Road (over-trading by £25.69m, convenience goods sales density £33,448 per sq.m)
 - Aldi, Kilburn High Road (over-trading by £11.69m; convenience goods sales density £27,896 per sq.m)
 - Aldi, Kingsbury (over-trading by £13.57m; convenience goods sales density £25,219 per sq.m)
- 5.31 A further number of in-centre stores are trading at between £5m and £10m above company average levels – these include Tesco Metro stores in Wembley and Harlesden, Tesco Express in Kilburn, and Sainsbury's Local stores in Kilburn, Willesden Green and Queen's Park.
- 5.32 As set out above, the aggregate trading performance of main foodstores in the Borough is one of over-trading. However, there are a number of stores which are trading at below company average levels. The Tesco Extra store at Brent Park is identified as trading at £19.58m below company average levels, and the analysis in Table 5.5 above confirms that this store only has limited influence over food shopping patterns in the survey area, with its highest market share being 7.4% from zone 7. The store has a convenience goods sales density of £7,105 per sq.m, compared to a company average of £12,809 per sq.m for Tesco.
- 5.33 The 2008 Study identified the Tesco Extra at Brent Park as the only foodstore in the Borough to be significantly under-trading, and with the exception of the new Morrisons at Colindale (discussed below), this remains the case. The 2008 Study noted that the store is *'an old-style Tesco superstore, which suffers from poor connectivity from surrounding residential areas and poor access from the North Circular... there are mitigating circumstances for its low turnover and may also be the reason for the high turnover of other nearby supermarkets, such as the Asda in Wembley'*. We consider these conclusions to remain applicable.
- 5.34 The recently-opened Morrisons store in Colindale is also identified as under trading, with a turnover £16m below company average levels, and a convenience goods sales density of £6,170 per sq.m (Morrisons company average £11,210 per sq.m). This is likely a reflection of the strong competition in this part of the Borough, not least the adjacent Asda Colindale store, and a second Morrisons at nearby Queensbury, both of which – as shown above – are trading very strongly. The only in-centre store trading noticeably below company average levels (i.e. in excess of £5m below) is the Tesco Metro store on Burnt Oak Broadway.

Ethnic goods shopping

- 5.35 Brent is a diverse Borough and a number of the centres play important roles as destinations for specialist ethnic and world food and non-food shopping. The household telephone survey, in addition to capturing residents' main food and non-food shopping trips, as discussed above, also sought to capture these patterns of ethnic and world food goods shopping trips, to help establish the contribution they make to the wider vitality and viability of the centres:
- 50% of respondents to the household survey stated that they buy food products from ethnic / world food goods shops. This is a high percentage, and one which reflects Brent's diverse



community and the fact that many of its centres have a strong ethnic / world foods goods offer.

- 19% of respondents to the household survey stated that they buy ethnic / specialist non-food goods, reflecting the fact that the range of goods traded is more limited, and concentrated in fewer centres across the Borough.

Shopping patterns

- 5.36 The most popular locations for ethnic / world food goods shopping are Kingsbury (cited by 20% of respondents who visit ethnic / world food goods shops), followed by Harlesden (10%), Ealing Road (8%), Wembley (7%), Willesden Green (5%), Colindale (4%), Harrow (4%) and Kilburn (3%).
- 5.37 The most popular locations for ethnic / specialist non-foods goods are Ealing Road (cited by 17% of respondents who purchase these products), followed by Wembley (12%), Southall (9%), Harrow (8%), Harlesden (7%) and Central London (6%). A key destination for ethnic / specialist non-food goods which falls outside the survey area but draws market share from a number of survey zones is Southall, which is a popular destination for residents in zone 1 (Wembley) and zone 5 (Neasden).
- 5.38 Table 5.6 shows the most popular destinations for ethnic food and non-food shopping for each of the survey area zones which falls within LB Brent. We then discuss each of the key centres which attract ethnic shopping market shares in further detail.

Table 5.6 | Most popular destinations for ethnic food & non-food shopping by zone

		Most popular destination for ethnic / world goods	Second-most popular destination for ethnic/world goods	Third-most popular destination for ethnic/world goods
Zone 1 / Wembley	Food	Ealing Road (23%)	Wembley (21%)	Kenton / Preston Road / Golders Green* (each 7%)
	Non-food	Wembley (28%)	Ealing Road (23%)	Southall* (20%)
Zone 2 / Kenton	Food	Kingsbury (64%)	Harrow* (13%)	Kenton (9%)
	Non-food	Ealing Road (42%)	Abroad* (24%)	Harrow* (14%)
Zone 3 / Burnt Oak	Food	Kingsbury (49%)	Colindale (16%)	Harrow (6%)
	Non-food	Harrow* (23%)	Colindale / Wembley (each 17%)	Ealing Road (16%)
Zone 4 / Colindale	Food	Kingsbury (28%)	Colindale (22%)	Burnt Oak (15%)
	Non-food	Wembley (33%)	Kingsbury (20%)	Abroad* (15%)
Zone 5 / Neasden	Food	Kingsbury (24%)	Neasden (13%)	Willesden Gn / Harlesden (each 13%)



	Non-food	Southall* (29%)	Ealing Road (20%)	Wembley / Camden Town* (each 14%)
Zone 6 / Cricklewood	Food	Cricklewood (29%)	Willesden Green (8%)	Kilburn (8%)
	Non-food	Ealing Road (42%)	Cricklewood (19%)	Abroad* (6%)
Zone 7 / Kilburn	Food	Queen's Park (20%)	Kilburn (19%)	Central London (11%)
	Non-food	Central London* (27%)	Brent Cross* (23%)	Kilburn (21%)
Zone 8 / Harlesden	Food	Harlesden (37%)	Kingsbury (12%)	Willesden Gn / Harlesden (each 12%)
	Non-food	Harlesden (37%)	Shepherd's Bush* (17%)	Willesden Green (8%)
Zone 9 / Greenford	Food	Greenford* (38%)	Ealing Road (19%)	Harlesden (11%)
	Non-food	Ealing Road (19%)	Harlesden (18%)	Abroad* (14%)

Source: household survey results

Kingsbury

- 5.39 Kingsbury draws market share from across a wide part of the survey zone for its range of ethnic / world food goods. Kingsbury falls within Zone 2 of the survey area, and draws a market share of 64% from its local zone. Kingsbury also draws strong market shares from a number of other zones, notably zone 3 (Burnt Oak, 49%), zone 4 (Colindale, 28%) and zone 5 (Neasden, 24%), and these strong market shares indicate that Kingsbury's ethnic food shopping offer makes it a 'destination' for the purchase of these types of goods – and indeed its market shares for this type of activity are far greater than those it attracts for general food/non-food shopping. It follows, therefore, that ethnic food shopping is an important contributor to the overall vitality and viability of Kingsbury district centre.
- 5.40 Of those residents that visit Kingsbury for ethnic food shopping, almost half (43.6%) visit once a week, and 22.8% visit once a fortnight. 16.5% visit the centre more than once a week. 75.9% of respondents purchase Asian foods, 13.2% purchase Indian foods and 4.5% purchase Halal products.
- 5.41 Kingsbury also attracts a market share of 28% from zone 4 (Colindale) and 22% from zone 5 (Neasden) for its ethnic non-food shopping, although only draws a small market share from its local zone (zone 2), likely on account of the competing offer in nearby Ealing Road and Harrow.

Harlesden and Willesden Green

- 5.42 Harlesden and Willesden Green both fall within zone 8 and make important contributions to the ethnic food shopping offer of the Borough, with Harlesden in particular having a strong offer in this respect. Harlesden accounts for over one-third of all ethnic food shopping trips from zone 8, and also draws market share from zone 5 (Neasden, 13%) and zone 9 (Greenford, 11%). Willesden Green does not attract as strong a market share from any of the zones, but draws a 12% market share from its



'local' zone, as well as a 13% market share from zone 5 (Neasden) and a 8% market share from zone 6 (Cricklewood).

- 5.43 34% of residents who visit Harlesden for ethnic food shopping do so once a fortnight, and a further 29% visit once a week. 16% visit more than once a week. Willesden Green has a higher proportion of weekly visitors (49%) than fortnightly visitors (16%), and also a higher proportion of visitors using the centre for ethnic food shopping more than once a week (24%), suggesting it acts more as a day-to-day shopping destination than Harlesden.
- 5.44 57% of respondents who visit Harlesden for ethnic food shopping do so to purchase Caribbean goods. 22% purchase Asian food goods, and 19% purchase African food goods. Willesden Green's offer is broader than Harlesden and meets the shopping needs of a different range of communities: 59% of respondents who visit Willesden for ethnic food shopping do so to purchase Asian food goods; 42% for Halal goods; 18% for Oriental/Chinese goods; 14% for Polish goods; and 12% for Indian goods. Both centres therefore cater to the specialist food shopping needs of a broad range of communities.
- 5.45 Neither centre plays a significant role as a non-food shopping destination for ethnic goods; whilst Harlesden attracts a market share of 33% from its local zone, its influence does not extend beyond this.

Wembley and Ealing Road

- 5.46 Both Wembley town centre and Ealing Road district centre fall within zone 1 of the survey area. Ealing Road attracts a market share of 23% for ethnic food goods for residents in this zone, with Wembley attracting a further 21% of the market share. The two destinations combined therefore account for almost half of all ethnic food shopping trips for residents in zone 1. The remaining market share is distributed across a wide range of destinations, including Preston Road, Kingsbury, Kenton and Golders Green.
- 5.47 Of those residents who visit Ealing Road for ethnic food shopping, 46% visit once a week, 14% visit once a fortnight and 27% visit once a month. Just 2% visit more than once a week. This might be aligned to the fact that Ealing Road plays an important role as an ethnic non-food shopping destination, which typically attract less frequent patterns of visits, with shopping for ethnic food goods acting as a linked trip. In contrast, 31% of respondents visit Wembley town centre once a week, and 21% visit more than once a week.
- 5.48 Wembley and Ealing Road are both important destinations for non-food ethnic goods and attract a market share from multiple zones. Ealing Road in particular, despite being a relatively small district centre, has an established concentration of jewellers, clothing, fabrics and homeware stores serving the Indian community, although 20% of residents in zone 1 travel further afield to Southall, where there is a wider offer available.

Other locations

- 5.49 A number of other town and district centres also play a role in meeting the ethnic food shopping needs of residents, albeit serving a more localised catchment. For example:
- **Colindale** attracts a market share of 22% from its local zone, zone 4, as well as a 9% market share from zone 3 (Burnt Oak). Residents use the centre to purchase Asian, Halal and Oriental / Chinese food goods.
 - **Cricklewood** attracts a market share of 29% from its local zone (zone 6), but no market share of note from beyond this. The centre offers a particularly diverse range of ethnic food shopping options however, with 31% of respondents who visit Cricklewood for this purpose visiting Caribbean food stores; 27% visiting Asian food stores; 26% visiting Halal stores; 18% visiting Oriental / Chinese stores and 7% visiting Polish stores.



- **Kenton** attracts a market share of 9% from its local zone (zone 2), and a 7% market share from zone 1 (Wembley). The centre principally caters to Asian and Halal food shopping.
- **Queen's Park** attracts a market share of 20% from residents in zone 7.

Markets

5.50 Markets – both day-to-day produce and household goods markets, and specialist markets such as food/grocery markets, farmers markets or craft markets - can make an important contribution to town centre vitality and viability, acting as footfall generators and providing opportunities for linked trips spend. In the case of specialist markets, they can provide an additional reason to visit a centre which differentiates from its 'day to day' offer.



Kilburn market

- 5.51 Depending on the size and scale of the market, markets can become destinations in the own right – Broadway Market and Columbia Road Market in Hackney being two examples of this. However day-to-day markets can also make highly positive contributions to town centre vitality and viability, as evidenced by the success of street markets in centres such as Dalston, Walthamstow, Deptford and Lewisham.
- 5.52 The network of town centres across Brent do not host any street markets of significant scale, and most centres – Cricklewood, Colindale, Ealing Road, Harlesden, Kenton, Kingsbury, Neasden, Preston Road, Wembley Park and Willesden Green – do not have any markets at all. The linear nature of many of these centres, along busy arterial routes, limits the options for the presence of market facilities, however in some centres where there is part-pedestrianisation, such as Harlesden for example, there may be scope for the introduction of limited street market facilities.
- 5.53 The household survey results identify that only 21% of residents in the survey area visit specialist markets. In three of the nine survey zones (zones 2, 5 and 9), under 10% of respondents visit specialist markets, although in zones 6 and 7, approximately one-third of respondents visit specialist markets. The only location which attracts a significant cross-zone market share is Queen's Park,



which hosts a weekly Sunday Farmers' Market at Salusbury Primary School. The market was established in 2005 and regularly hosts over 40 stalls, as well as providing food and drink and seating areas. The Queen's Park market attracts 52% of the market share from zone 7, 38% from zone 8 and 17% from zone 6.

- 5.54 In Kilburn, there is a small market which operates from a purpose-built facility in Kilburn Square, within the primary shopping area of Kilburn town centre, which operates six days a week and predominantly sells non-food items such as household goods and clothing. The market facilities are dated and, whilst assisting in diversifying the offer of the town centre, do not appear to make a particularly positive contribution to its overall vitality and viability. Nevertheless, Kilburn market attracts a 33% market share from zone 6 (Cricklewood), although only a 4% market share from its local zone, zone 7.



6 |

Quantitative retail need



6. Quantitative retail need

- 6.1 Having undertaken the assessment of shopping patterns and assessment of trading performance in the previous section, in this section we present a summary of the quantum of comparison and convenience goods floorspace which the Council should seek to plan for over its new Local Plan period to 2041. The findings of this section should be read alongside Tables 1 to 10 inclusive of Appendix 1 (for comparison goods need) and Appendix 2 (for convenience goods need). Our capacity forecasts are presented at five-year interval periods: 2018-23, 2023-28, 2028-33, and a final eight-year interval period for 2033-41.
- 6.2 In identifying capacity, it is important to note that forecasts become increasingly open to margins of error over time, and accordingly will need to be refreshed over the course of the Council's Local Plan.
- 6.3 The need for new comparison and convenience goods floorspace is discussed below. Firstly, however, we discuss the key inputs into both need assessments – namely population and expenditure growth, 'special forms of trading' such as online shopping, and 'commitments' for new retail floorspace.

Key inputs into the need assessments

Population projections

- 6.4 For the purposes of our quantitative needs assessment, we have utilised population forecasts bespoke to each survey zone for the study base year (2018); these have been provided by Experian. To project the population of each survey zone forward over the study period, we have:
- Firstly, used GLA ward-based population projections²⁰, we have assigned each of the wards which fall within the survey area to one of the nine survey zones. This uses a best-fit approach, as the survey zones are defined by postcode sectors rather than ward boundaries.
 - Secondly, using these ward-based population projections, we have calculated the population growth rate (i.e. as a percentage) expected to come forward in each zone for each of the interval periods (2018-23, 2023-28, 2028-33 and 2033-41).
 - Thirdly, we have applied the growth rate % to the base year (2018) Experian zonal population forecasts. This provides us with a total population figure for each zone, for each of the interval periods.
- 6.5 Experian identify that the current population of the survey area (2018) is 687,733 persons. Informed by the GLA's forecast population growth rates, it is estimated this will increase to 736,759 persons by 2023; 782,013 persons in 2028; 819,306 persons in 2033; and 853,157 persons in 2041. The population of the survey area is therefore expected to increase by 94,240 persons by 2028, and by 165,384 persons by 2041. Population growth for each of the individual survey zones is shown in Table 1 of Appendix 1 and 2.

Expenditure

- 6.6 Experian identify a 'per capita' spend on comparison and convenience goods for the survey area. These are identified in Table 2 of Appendix 1 for comparison goods, and Table 2 of Appendix 2 for convenience goods. Expenditure per head on comparison goods is currently (2018) £3,183, and expenditure per head on convenience goods is £1,855.

²⁰ GLA Ward-level projection incorporating the 2016 Strategic Housing Land Availability Assessment (SHLAA) development trajectory. Constrained to the central trend projection at the London level. Downloadable from https://files.datapress.com/london/dataset/projections/2017-11-15T10:33:33.23/ward_housing_led_2016_base.xlsx



- 6.7 Based on guidance provided by Experian (Retail Planner 15, 2017), it is expected that spend per head on comparison goods will increase over the study period, with Experian identifying a spend growth of 3.2% per annum from 2020 onwards. Expenditure growth in the convenience goods sector is forecast by Experian to be considerably more limited, with forecast growth of just 0.1% per annum beyond 2020. Full details of the growth rates which have been applied are shown in Table 2 of Appendix 1 and 2.
- 6.8 By multiplying the population forecasts shown in Table 1 of Appendix 1 and 2 to the per capita expenditure figures, a total 'pot' of comparison and convenience goods expenditure can be identified, which is shown in Table 3 of Appendix 1 for comparison goods, and Table 3 of Appendix 2 for convenience goods:
- Table 3 of Appendix 1 shows that the total 'pot' of comparison goods expenditure in the survey area is currently £2,118.98m (£2.12bn). This is expected to increase to £3,298.87m (£3.29bn) by 2028, and £5,420.21m (£5.42bn) by 2041.
 - Table 3 of Appendix 2 shows that the total 'pot' of convenience goods expenditure in the survey area is currently £1,276.07m (£1.28bn). This is expected to increase to £1,366.93m (£1.37bn) in 2028, and £1,603.59m (£1.60bn) by 2041.

'Special forms of trading'

- 6.9 As section 2 of this report set out, online shopping is accounting for an increasingly significant share of total available expenditure, particularly in respect of comparison goods shopping, and Experian forecast that the 'claim' which online shopping makes on total available comparison and convenience goods spend will increase in future years. As our retail capacity forecasts are only concerned with identifying the need for new physical 'bricks and mortar' retail floorspace, it is necessary to deduct spending via SFT from our forecasts.

Comparison goods

- 6.10 The household survey assessed residents' online shopping patterns for each of the seven comparison goods shopping types mentioned in the survey (see para 5.2), and a total 'composite' online shopping proportion was established. The survey results identify that, for comparison goods, rates of online shopping across the survey area are significantly higher than the current UK average of 15.4% identified by Experian's Retail Planner Briefing Note (RPBN) (2017). On average, 24.1% of comparison goods shopping across the survey area is undertaken online. At the zonal level, proportions of online comparison goods shopping range from 18.6% in zone 3 (Burnt Oak) to 28.1% in zone 7 (Kilburn) and 28.2% in zone 8 (Harlesden).
- 6.11 We have therefore deducted 24.1% from the total available comparison goods spend of £2.19bn; this is equivalent to £528.25m, reducing the total 'pot' of comparison goods expenditure which is spent in physical retail outlets to £1.67bn.
- 6.12 At the national level, Experian forecast that the proportion of comparison goods spend which is spent online will increase from 15.4% (2018) to 17.4% by 2023 (+2.0 percentage points from 2018), 17.6% by 2028 (+0.2 percentage points from 2023), 17.9% by 2033 (+0.3 percentage points from 2028) and 18.0% by 2041 (+0.1 percentage points from 2033). On the assumption that the survey area will continue to follow national trends, we have applied the same percentage point increases to the base year SFT claim of 24.2%, meaning that by 2041, online shopping will account for 26.7% of total available comparison goods spend in the survey area. (**Table 6.1**).



Table 6.1: Comparison goods SFT deductions

	2018	2023	2028	2033	2041
Experian UK average comparison SFT (%)	15.4%	17.4%	17.6%	17.9%	18.0%
Survey area average comparison SFT (%)	24.1%	26.1%	26.3%	26.6%	26.7%

Source: Table 3, Appendix 1 (for survey area figures) / Experian RPBN (for UK averages)

Convenience goods

- 6.13 The survey results identify that the proportion of total available convenience goods expenditure which is spent online is more closely aligned to the UK average. On average, 3.5% of convenience goods shopping across the survey area is undertaken online, compared to 3.4% nationally. At the zonal level, online convenience goods shopping is noticeably above average in zone 7 (Kilburn) at 8.9%, possibly reflecting the fact that there are no large-format superstores in this zone, and the lowest proportion of online convenience goods shopping is in zone 1 (Wembley) at 1.0%.
- 6.14 Experian forecast that the total proportion of convenience goods spend which is spent online will increase modestly from 3.4% (2018) to 4.8% by 2028 and 5.3% by 2041. We have applied the same percentage point increases to the survey area base year figure of 3.5%, meaning that we have assumed 4.9% of total available convenience goods spend will be spent online in 2028, and 5.4% by 2041 (Table 6.2).

Table 6.2 | Convenience goods SFT deductions

	2018	2023	2028	2033	2041
Experian UK average convenience SFT (%)	3.4%	4.2%	4.8%	5.2%	5.3%
Survey area average convenience SFT (%)	3.5%	4.3%	4.9%	5.3%	5.4%

Source: Table 3, Appendix 2 (for survey area figures) / Experian RPBN (for UK averages)

Residual expenditure

- 6.15 Having removed SFT from the total 'pots' of convenience and comparison goods expenditure, Table 3 of Appendix 1 and 2 show that:
- There is currently £1,660.73m (£1.66bn) of comparison goods expenditure available to the survey area. This is expected to increase to £2,430.21m (£2.43bn) by 2028 and £3,971.28m (£3.97bn) by 2033.
 - There is currently £1,231.45m (£1.23bn) of convenience goods expenditure available to the survey area. This is expected to increase to £1,299.99m (£1.30bn) by 2028 and £1,517.04m (£1.52bn) by 2033.



Floorspace efficiency growth

- 6.16 In assessing the capacity for future retail floorspace, we have assumed that existing floorspace stock across the Borough will improve its sales efficiency (turnover per sq.m) over the course of the plan period. We have assumed that sales efficiency growth will be 50% of total expenditure growth, meaning that:
- For comparison goods, we have assumed a floorspace efficiency growth rate of 0.45% between 2018-19; 1.05% between 2019-20; and 1.6% per annum from 2020 onwards.
 - For convenience goods, we have not assumed any floorspace efficiency growth up to 2020 as Experian do not forecast any expenditure growth in the convenience goods sector over this period. For 2020 onwards, we adopt a modest sales efficiency growth rate of 0.05% per annum.

Commitments

- 6.17 In identifying future retail capacity, it is also necessary to take into account 'commitments' for new retail floorspace, which will act as 'claims' on the amount of comparison and convenience spending which is available to support new floorspace. Commitments are proposed new developments which will include floorspace for retail use, which have been granted planning permission but which were not built/trading at the time of the household survey.
- 6.18 The Council have provided data on permissions for new retail floorspace in the Borough, and a schedule of the 'commitments' we have incorporated into our capacity forecasts are shown in Table 7 of Appendix 1 (for comparison goods) and Table 7 of Appendix 2 (for convenience goods). As a rule, we have only incorporated commitments with over 500 sq.m of class A1 floorspace.
- 6.19 All of the commitments we have incorporated into our analysis are flexible permissions, which allow the development of a range of class A retail uses, as well as in most cases class D2 leisure uses and other types of floorspace. This means that the exact amount of comparison or convenience goods floorspace which will come forward within each permission is not controlled through planning conditions, and therefore cannot be accurately quantified.
- 6.20 In order to test what we consider is likely to be the maximum 'claim' on expenditure these commitments will account for, we have typically assumed that comparison goods floorspace will account for between 25% and 50% of total permitted floorspace, and convenience goods will account for up to 25% of total permitted floorspace. A full schedule of the assumptions we have adopted is provided at the foot of Table 7 in Appendix 1 and 2. The majority of the extant permissions for new floorspace are in the Wembley area.
- 6.21 In total, we estimate that the commitments amount to 61,527 sq.m net, of which up to 20,691 sq.m net could be used for the sale of comparison goods, and up to 17,324 sq.m net could be used for the sale of convenience goods. We would expect the balance of the floorspace to come forward for the other classes of floorspace permitted under each application's respective flexible consent.

Baseline need for comparison goods floorspace

- 6.22 The baseline 'need' for comparison goods floorspace is summarised at Tables 8-10 of Appendix 1, which are structured as follows:
- **Table 8** (containing sub-tables 8a-8g) sets out the comparison goods need for each of the seven sub-areas in Brent.
 - **Table 9** (containing sub-tables 9a-9g) sets out the comparison goods need which is generated by out-of-centre floorspace in the Borough, such as retail warehouses and non-food floorspace in foodstores, again divided by sub-area.



- **Table 10** sums the outputs of Tables 8 and 9 to present the total comparison goods floorspace need for each sub-area, as well as an overall total for the Borough.

6.23 A summary of the comparison goods need for the Borough, for each of the sub-areas and as a Borough-wide total, is set out in **Table 6.3**. These ‘baseline’ capacity forecasts are based on a ‘constant market share’, i.e. assuming that current shopping patterns will remain unchanged over the period to 2041.

Table 6.3 | Comparison goods quantitative need by sub area

Sub-area	Key centres	Comparison goods need, 2023 (sq.m net, rounded)	Comparison goods need, 2028 (sq.m net, rounded)	Comparison goods need, 2033 (sq.m net, rounded) – indicative only	Comparison goods need, 2041 (sq.m net, rounded) – indicative only
Central	Wembley Park	-5,400*	300*	6,000*	13,400*
North West	Kenton, Preston Road	200	900	1,700	2,800
North	Burnt Oak, Colindale, Kingsbury	-2,900	-500	2,000	6,500
East	Neasden	200	500	800	1,300
South East	Kilburn, Cricklewood, Willesden Green, Kensal Rise, Queen’s Park	2,000	7,200	12,300	21,500
South	Harlesden, Church End	1,900	4,800	7,700	11,800
South West	Wembley, Ealing Road, Sudbury	-2,100	1,800	5,700	10,900
Total for Brent		-6,300	14,900	36,400	68,300

Source: Table 10, Appendix 1. Note: figures may not add due to rounding. *We have included of the committed floorspace for the Wembley / Wembley Park area within the need figures for the Central sub-area, as this is where the majority of development sites are located. Need figures should be considered alongside those for the South West sub-area. Owing to the flexible consent granted to most permissions in this area, figures should be reviewed once commitments are implemented.

6.24 Table 6.3 shows that at 2023, there is an over-supply of comparison goods floorspace in the Borough of approx. 6,300 sq.m net – in other words there is no requirement for additional comparison goods floorspace to be planned for in the next five years. After this (from 2028 onwards) there is a positive requirement for new comparison goods floorspace across the Borough although we repeat our advice that need forecasts beyond 2028 should be treated as indicative. The total ‘baseline’ comparison goods need figure for the Borough is 14,900 sq.m net by 2028, increasing indicatively to 68,300 sq.m net by 2041.

6.25 Table 6.3 shows, from 2028 onwards, a positive need arising across each of the seven sub-areas, with the highest amounts of quantitative need arising in the South East sub-area (7,200 sq.m net by 2028 /



21,500 sq.m net by 2041) and the South sub-area (4,800 sq.m by 2028 / 11,800 sq.m net by 2041). In the latter sub-area, the high levels of need are driven partly by the inclusion of the strong-performing Ikea store at Brent Park within this sub-area.

6.26 The need in the Central and South West sub-areas (covering Wembley and Wembley Park) is more limited due to the high number of commitments for new retail floorspace in this area. The implementation of these will need to be carefully monitored to inform future reviews of the above capacity figures.

Baseline need for convenience goods floorspace

6.27 In the remainder of this section we set out the quantitative need for additional convenience goods floorspace in the Borough. As with the comparison goods capacity forecasts identified above, we advise that forecasts are open to increasing margins of error over time, and should be refreshed at regular intervals over the new Local Plan period.

6.28 As with the comparison goods capacity forecasts, we have made allowance for ‘commitments’ for new convenience goods retail floorspace to come forward. The commitments are set out at Table 7 of Appendix 2. As we have identified previously, these commitments are flexible permissions, meaning that the amount of convenience goods floorspace which will come forward within each has not been controlled by way of planning conditions, and thus cannot be accurately quantified. Therefore, for the majority of commitments, we have assumed that 25% of the estimated net sales area will be used for commitments.

6.29 Based on the assumptions set out above (and set out in detail of Table 7 of Appendix 2), we estimate there to be 17,324 sq.m net of permitted convenience goods floorspace in the Borough, the majority of which (12,577 sq.m net) is in the Wembley area. We estimate this 17,324 sq.m net of convenience goods floorspace will achieve a turnover of £97.92m in 2023, increasing to £98.81m by 2041. This figure therefore acts as a ‘claim’ on the need for new convenience goods floorspace in the Borough.

6.30 **Table 6.4** (adapted from Tables 8 and 9 of Appendix 2) shows the ‘need’ for new convenience goods floorspace in the Borough, sub-divided by Local Plan sub-areas. The capacity forecasts are based on a ‘constant market share’, i.e. assuming that the patterns of convenience goods shopping which this study has identified remain unchanged.

Table 6.4 | Convenience goods quantitative need by sub-area

Sub-area	Key centres	Convenience goods need, 2023 (sq.m net, rounded)	Convenience goods need, 2028 (sq.m net, rounded)	Convenience goods need, 2033 (sq.m net, rounded) – indicative only	Convenience goods need, 2041 (sq.m net, rounded) – indicative only
Central	Wembley Park	-2,600	-1,800	-800	500
North West	Kenton, Preston Road	100	500	800	1,400
North	Burnt Oak, Colindale, Kingsbury	500	1,600	2,300	3,800
East	Neasden	200	200	300	300



South East	Kilburn, Cricklewood, Willesden Green, Kensal Rise, Queen's Park	6,800	7,500	8,400	10,000
South	Harlesden, Church End	400	900	1,500	2,400
South West	Wembley, Ealing Road, Sudbury	5,300	6,100	7,100	8,400
Total for Brent		10,600	15,100	19,600	26,800

Source: Table 8 & 9, Appendix 2. Note: figures may not add due to rounding. *We have included of the committed floorspace for the Wembley / Wembley Park area within the need figures for the Central sub-area, as this is where the majority of development sites are located. Need figures should be considered alongside those for the South West sub-area. Owing to the flexible consent granted to most permissions in this area, figures should be reviewed once commitments are implemented.

- 6.31 Table 6.4 shows there is a positive requirement for new convenience goods floorspace which the Council will need to plan, totalling 15,100 sq.m over the period to 2028 and increasing, indicatively, to 26,800 sq.m net by 2041. The need for new floorspace is principally concentrated in two sub-areas – South East and South West. This is a reflection of the fact that these areas host a number of the large out-of-centre foodstores to which residents look towards for their food shopping, and also that the majority of existing convenience goods floorspace in these areas is trading strongly, resulting in a pent up quantitative need for additional provision.
- 6.32 There is no identified need for new convenience goods floorspace for the Central sub-area until the very end of the Plan period (at 2041), owing to the significant amount of committed floorspace in the Wembley area. The Council will need to monitor the implementation of the consents listed at Table 7 of Appendix 2 to establish the proportion which is built out as convenience goods floorspace, and this should be incorporated into future reviews of this study. The requirements for the East and South sub-areas are small, with a requirement for 200 sq.m net convenience goods floorspace in the East sub-area and 900 sq.m net in the South sub area by 2028.
- 6.33 It is emphasised that the quantitative requirements we have identified in this section are ‘baseline’ forecasts, based on constant market shares, i.e. assuming that current patterns of shopping will remain unchanged through the study period. In Document C, we use the findings above to develop recommendations in respect of the most appropriate locations for the provision of new comparison and convenience goods floorspace.

Scenario testing

- 6.34 In the remainder of this section, we explore the implications of two major proposed retail developments falling outside the Borough on the quantitative comparison goods needs figures we have identified above. The two developments are the extension of Brent Cross Shopping Centre, and the development of a new ‘Major’ centre at Old Oak Common. Both of these can be expected to potentially draw some ‘market share’ from the network of centres in Brent, which will accordingly reduce the overall comparison goods retention rate and thus the quantitative need for new floorspace. A summary of the proposed developments at Brent Cross-Cricklewood and Old Oak Common has previously been provided in Section 3 of this report.
- 6.35 The exact quantum of floorspace expected to come forward as part of the extension to Brent Cross has been the subject of amendment through approved Section 73 planning applications to the original consent, and we understand that the amended permissions allow for a maximum of 56,600 sq.m of comparison goods floorspace to come forward. As set out in Section 3, the timescale for the implementation of the Brent Cross extension has recently been delayed, and it would appear unlikely



that any new development will be trading before 2024. However, in order to be consistent with the five-year modelling periods used in this study – and to present a worst case scenario - we have assumed that the extension will be trading by 2023.

- 6.36 At Old Oak Common, a total of 27,250 sq.m of new class A1 retail floorspace is expected to come forward at a new centre at Old Oak High Street. Evidence submitted in supported of the OPDC Local Plan confirms that some trade diversion from the comparison goods turnover of Harlesden and Wembley town centres can be expected. Accordingly, we have only factored Old Oak High Street into our scenario test for the South Brent sub-area (which covers Church End and Harlesden) and South West Brent sub-area (which covers Wembley). We have assumed this floorspace will all be trading by 2028. We have not made any allowance for the local centres proposed within the OPDC area to impact on the network of centres in Brent.
- 6.37 Whilst it is clear that centres in Brent will experience some monetary trade diversion as a consequence of the proposals at Brent Cross and Old Oak Common, the scope for the network of centres in Brent to experience a substantial quantum of monetary trade diversion will be tempered by the fact that the two proposed developments are higher order in scale/nature. Brent’s centres will continue to act as day-to-day shopping destinations, and residents seeking higher-order shopping items such as clothing and footwear will continue to travel further afield to locations such as Brent Cross, Central London and Shepherd’s Bush.
- 6.38 As this report and the accompanying Town Centre Health Checks Report (Document B) has identified, the centres in Brent are principally orientated towards meeting local/day-to-day shopping needs. This reflects their role and function as district or local centres. The two ‘Major’ centres of Kilburn and Wembley perform an elevated role and function, but each has a relatively limited catchment, and in the case of Wembley, evidence from this report shows that the centre has lost market share and has a low comparison goods sales density. Any further trade diversion from the centre will reduce this performance further.

Brent Cross

- 6.39 We expect to predominantly see a redistribution of market share amongst these higher-order shopping destinations as a consequence of any new floorspace at Brent Cross – i.e. that it will attract market share from Central London and Westfield London, as well as other ‘higher order’ destinations. Our household survey results identified that when Westfield London opened at Shepherd’s Bush, most of its market share from the survey area was sourced from redistributed market share from Central London, with most centres in the Borough maintaining stable market shares. We would expect a similar trend would be likely to happen with any new floorspace at Brent Cross.
- 6.40 Nevertheless, given the proposed development at Brent Cross-Cricklewood includes a package of measures which will improve the connectivity of much the northern and eastern parts of the borough to Brent Cross, it is appropriate to assume that some residents may adjust their shopping patterns. We have therefore allowed for a reduction in the comparison goods retention rate of some of the sub-areas, as set out in Table 6.5 below.
- 6.41 It should be noted that because the extension to Brent Cross forms a longstanding part of Barnet’s development plan (i.e. it is policy compliant), no quantitative assessment of the impact of the proposed comparison goods floorspace on the surrounding network of centres has, to our knowledge, ever been undertaken. The scenario testing below should, accordingly, be treated as indicative only. We have based our assessments on the geographical proximity of the sub-areas to Brent Cross; the proposed enhancements to linkages; and the role and function of the centres which fall within each sub-area.

Old Oak High Street

- 6.42 We do not expect that Old Oak High Street will act as a ‘destination’ shopping destination in the same way as locations such as Central London, Brent Cross and Shepherd Bush/Westfield London do.



The aspiration is for Old Oak High Street to be a ‘Major’ centre, meaning that it will unquestionably have a strong non-food retail offer, but not of sufficient scale that it will draw market share from an especially wide catchment. It is likely that much of the market share attracted to the new floorspace will be self-generated by the new residential community and users of the station, and again we consider the scope for substantial diversion of market share from any of Brent’s centres to be relatively limited. However, as noted above, reflecting the impact assessment work undertaken for the OPDC Local Plan, we have allowed for some trade diversion from the South and South West sub-areas.

- 6.43 As noted above, Wembley town centre has a low comparison goods sales density (turnover per sq.m), and this is also applicable to Harlesden town centre. Further diversion of comparison goods spend away – even of relatively modest amounts - from these centres will reduce the sales densities of these centres further, and it is therefore diversion of spend away from these centres should be mitigated to as great an extent as possible. Further discussion in respect of this point is set out in Section 4 of our Strategy & Recommendations Report (Document C).

Scenario test quantitative need summary

- 6.44 Based on the above discussion, **Table 6.5** shows where we have made allowance for a reduction in sub-area comparison goods expenditure retention on account of the proposed developments. The resultant changes to the quantitative comparison goods need figures for each sub area at 2028 are shown in the final column of the table.

Table 6.5 | Adjusted comparison goods capacity forecasts by sub-area, including allowance for Brent Cross and Old Oak Common developments

Sub-area	Adjustment	Justification	Comparison goods need at 2028 (no development scenario) (sq.m net)	Comparison goods need at 2028 (with BCSC/OPDC developments) (sq.m net)
Central	No adjustment.	Brent Cross Shopping Centre (BCSC) only attracts a 10.2% market share from the Wembley area. Residents split comparison goods shopping between a wide variety of destinations – Harrow, Shepherd’s Bush, Central London, Wembley and Brent Cross.	-6,400*	-6,400*
North West	No adjustment.	Centres in this zone (Kenton and Preston Road) have a limited comparison goods shopping function and would not be expected to experience diversion of trade.	900	900
North	5% reduction in expenditure retention from 2023 onwards.	Centres in this zone (Burnt Oak, Colindale and Kingsbury) have a limited comparison goods shopping function, but are highly proximate to proposed development, suggesting potential for a small proportion of residents to alter shopping patterns. BCSC currently obtains its second highest market share from the Colindale area (zone 4, 44.8%).	-2,000	-2,700
East	2% reduction in expenditure	The only centre in this area (Neasden) has a limited comparison goods shopping function, with a	500	500



	retention from 2028 onwards.	turnover of £8.05m (2018). 32.6% of residents in the Neasden area currently shop at BCSC. As the closest centre in the Borough to BCSC, with access which will be enhanced, it is considered there is scope for very modest trade diversion to take place.		
South East	10% reduction in expenditure retention from 2023 onwards.	Kilburn town centre falls within this sub-area, and as the centre with the strongest comparison goods offer in the Borough, is considered the most vulnerable to residents' changing shopping patterns. BCSC currently attracts its highest market share from residents in the northern part of this sub-area (Cricklewood, 35.7%), and enhanced access and a stronger offer at BCSC may increase this market share further at the expense of Kilburn.	4,900	1,500
South	10% reduction in expenditure retention (combined BCSC and Old Oak Common High Street) from 2023 onwards.	Harlesden town centre falls within this sub-area, and 25.7% of residents in the Harlesden area are currently travelling to BCSC for comparison goods shopping. When considering the potential for enhanced linkages, there may be scope for some additional market share to be captured by BCSC. Our 10% reduction in expenditure retention from this sub-area also has regard to the development of the new centre at Old Oak High Street. Evidence submitted in support of the OPDC Local Plan confirms some trade diversion from Harlesden town centre is expected to take place.	2,500	1,600
South West	2% reduction in expenditure retention from 2028 onwards.	OPDC Local Plan evidence base forecasts a small amount of trade diversion from Wembley town centre to new centres in OPDC area. Brent Cross Shopping Centre (BCSC) only attracts a 10.2% market share from the Wembley area. Residents split comparison goods shopping between a wide variety of destinations – Harrow, Shepherd's Bush, Central London, Wembley and Brent Cross, therefore no allowance made for reduction in market share as a consequence of Brent Cross extension opening.	3,000	2,600



- 6.45 As set out in Table 6.5, we have modelled for a reduction in retained comparison goods expenditure in the North, East, South East, South and South West sub-areas, which has translated into a reduction in the quantitative need figures for these sub-areas. Based on this scenario test, the resultant overall quantitative comparison goods needs which the Borough should plan for over its new Local Plan period are summarised in **Table 6.6**. The overall quantitative comparison goods need which the Borough will need to plan for reduces to from 14,900 sq.m net (baseline scenario) at 2028 to 9,500 sq.m net, and indicatively by 2041 the need figure reduces from 68,300 sq.m net (baseline scenario) to 61,100 sq.m net.
- 6.46 We reiterate our advice above that these need figures should be subject to regular review throughout the Plan period, and figures beyond 2028 should be considered indicative.

Table 6.6 | Summary of quantitative comparison need for Brent, including scenario test

	Comparison goods need, 2023 (sq.m net, rounded)	Comparison goods need, 2028 (sq.m net, rounded)	Comparison goods need, 2033 (sq.m net, rounded) – indicative only	Comparison goods need, 2041 (sq.m net, rounded) – indicative only
Baseline	-6,300	14,900	36,400	68,300
Scenario test including BCSC/Old Oak	-6,700	9,500	30,200	61,100
<i>Difference</i>	<i>-400</i>	<i>-5,400</i>	<i>-6,200</i>	<i>-7,200</i>



7 |

Commercial leisure assessment



7. Commercial leisure assessment

- 7.1 In recent years, commercial leisure uses have begun making an increasingly important contribution to the vitality and viability of town centres, with successful town centre increasingly offering a balanced mix of retail, leisure, civic, community and residential uses; a full discussion of these trends is provided in Section 2 of our report.
- 7.2 In this section, we review the patterns of visits to different commercial leisure facilities, drawing on the findings of the household telephone survey which was undertaken in support of this study. This helps us to understand whether centres have roles as commercial leisure destinations, contributing to their overall vitality and viability. It also helps us to identify any qualitative gaps in the commercial leisure of the Borough.
- 7.3 Following this, we identify the amount of commercial leisure expenditure growth which is expected to come forward in the survey area, and identify the quantitative need for class A3 and A4 floorspace.
- 7.4 We use the term ‘commercial leisure’ to cover town centre-based leisure activities such as bars, pubs, restaurants, cafes, cinemas, theatres, cultural venues such as museums and exhibition spaces, health & fitness facilities, and entertainment facilities such as ten-pin bowling and ice skating.

Patterns of visits to commercial leisure activities

- 7.5 Respondents to the household survey were asked which commercial leisure activities they participated in, and where they most recently visited to undertake that activity. The following levels of participation were identified from the survey results:
- The most popular form of commercial leisure activity was visiting the cinema, with 54% of respondents undertaking this activity;
 - 50% of respondents visit restaurants in the evening, with 33% of respondents visiting restaurants during the daytime;
 - 41% of respondents visit cafes;
 - 41% of respondents visit cultural venues;
 - 34% of respondents visit health & fitness facilities;
 - 32% of respondents visit pubs & bars;
 - 22% of respondents visit family entertainment venues;
 - 8% of respondents visit nightclubs.

Cinema

	Most popular destination for survey area	Second-most popular destination for survey area	Third-most popular destination for survey area
Cinema visits	Vue, Harrow (18%)	Vue, West Hampstead (Finchley Road O2) (16%)	Vue, Park Royal (16%)

Source: household survey results

- 7.6 The household survey results show that the Borough is surrounded by a number of cinemas to which residents are currently travelling to, but identifies a paucity of facilities within the Borough itself -



although the opening of the Cineworld in the LDO has assisted in capturing back some of the market share. Nevertheless, the three most popular destinations for cinema visits across the survey area are all located outside the Borough.

- 7.7 Looking at the results on a zone-by-zone basis, it can be seen that the opening of the Cineworld at the LDO has meant that this is the second-most popular location for cinema visits for residents in zone 1 (Wembley, 29% market share) and zone 2 (Kenton, 27% market share), and the third-most popular destination for residents in zone 3 (Burnt Oak, 14% market share), zone 4 (Colindale, 15% market share) and zone 6 (Cricklewood, 13% market share). In this respect, the cinema serves a wider catchment than Wembley's non-food shopping offer, as previous sections of this report have identified.
- 7.8 However, in each of these zones, a greater proportion of residents are continuing to look elsewhere for their cinema visits. The Vue cinema in Harrow has a significant influence on cinema visits across the north and west of the Borough, and is the most popular destination for residents in zones 1, 2 and 3. Vue in Harrow accounts for 38% of the market share in zone 1, 59% of the market share in zone 2 and 49% of the market share in zone 3. The West Hampstead Vue draws market share from across the south/south-east of the survey area, and is the most popular destination for residents in zone 4 (Colindale, 26% market share), zone 6 (Cricklewood, 38% market share) and zone 7 (Kilburn, 33% market share).
- 7.9 Two other Vue cinemas which sit outside the survey area also have a noteworthy influence over residents' patterns of cinema visits. The Vue cinema at Park Royal draws market share from the Wembley, Neasden, Harlesden and Sudbury areas, including a 16% market share from zone 1 (Wembley), 21% market share from zone 2 (Kenton), 14% market share from zone 5 (Neasden), 41% market share from zone 8 (Harlesden) and 50% market share from zone 9 (Greenford). Finally, a fourth Vue cinema in Shepherd's Bush draws a 29% market share from zone 8 and a 13% market share from zone 9.
- 7.10 There are several large multiplex cinemas surrounding the survey area which therefore have a strong influence over residents in the survey area. The introduction of a new market entrant has reduced the market share travelling to these surrounding facilities, with the LDO Cineworld featuring in the top 3 most popular cinema locations in five of the nine survey zones, and this should be considered positive. A more compelling supporting offer in Wembley town centre would likely further enhance Cineworld's market share; it should also be remembered that this facility will benefit from visitors from outside the survey area, reflecting the wider catchment of the LDO which this study has previously identified.
- 7.11 The LDO Cineworld is the only multiplex cinema in the Borough. However, there are also two independent arts cinemas in the south-east of the Borough, the Kiln (formerly the Tricycle) in Kilburn and the Lexi in Kensal Rise. The smaller size of these facilities and their focus on specialist arts films means we would not expect them to draw market share from across as wide a catchment as the multiplex facilities described above, but nevertheless it is positive to note that each facility attracts market share from its respective local zones - the Kiln draws a 21% market share from zone 7 (Kilburn), making it the second-most popular destination for residents in zone 7, and the Lexi draws a 10% market share from zone 8 (Harlesden) and a 7% market share from zone 7.
- 7.12 There is an absence of any arts cinemas in the remainder of the Borough, and given the lack of provision of such facilities in competing centres outside the Borough to the north and west (e.g. in Harrow), this in our view represents a qualitative gap which would both enhance the vitality and viability of a town centre(s), and, providing a sufficiently strong supporting offer was in place, potentially attract some custom from further afield.



Evening & daytime dining

	Most popular destination for survey area	Second-most popular destination for survey area	Third-most popular destination for survey area
Evening dining	Central London (23%)	Harrow (10%)	Kilburn (6%)
Daytime dining	Central London (19%)	Harrow (12%)	Kilburn (5%)

Source: household survey results

- 7.13 Evening dining is the second-most popular commercial leisure activity for residents in the survey, with half of all respondents participating. Visiting restaurants can sometimes be a relatively localised activity (in centres where there is a good offer in place), but can also form part of a 'destination' trip, for example in conjunction with seeing a show or a concert, and this is reflected in the patterns of visits identified in the household survey, which show a dispersed pattern of visits. This is reflected in the fact that the second and third most popular destinations (Harrow and Kilburn) attract market shares of just 10% and 8% respectively.
- 7.14 Wembley and Kilburn, as the two major centres in the Borough, draw similar market shares from their respective catchments; Wembley draws a 22% market share from its local zone, zone 1, as well as a 18% market share from zone 5 (Neasden). Kilburn draws a 22% market share from its local zone, zone 7, and also a 9% market share from zone 6 (Cricklewood). Both centres therefore cater to some local residents' needs, but the offer is not sufficiently attractive to draw significant market share from beyond this. Wembley's main competition is Harrow, which draws 38% of the market share from zone 1 (plus 25% of the market share from zone 2 and 21% of the market share from zone 9), whilst residents in zone 7 visit a number of destinations including Central London (22%), Queen's Park (12%), Camden Town (11%) and St John's Wood (8%). Kilburn therefore faces particularly strong competition for market share for residents in in local zone.
- 7.15 A number of Brent's other centres play a role at a local level as evening dining destinations, particularly Kingsbury, which attracts a 17% market share from zone 2, 15% market share from zone 3 and 14% market share from zone 4. We have set out previously that Kingsbury plays an important role as a centre for ethnic food retailing in the Borough, and these market shares indicate a further strong function of the centre. Elsewhere, Wembley Park attracts a 10% market share from residents in zone 5, and Willesden Green attracts a 15% market share from residents in zone 8.
- 7.16 Fewer residents visit destinations within and surrounding the survey area for dining out during the daytime, with 33% of respondents saying they participate in this activity. Of note is that both Wembley and Kilburn attract lower market shares for this type of activity than for evening dining - Wembley attracts a market share of just 11% from its local zone (zone 1) and Kilburn just 13% from its local zone, zone 7. In both centres, this points to a shortfall / poor quality offer of locations for daytime dining in both centres. In Kilburn's case, it also again points to strong competition from nearby centres - notably Queen's Park (14% market share from zone 7), St John's Wood (12%) and Cricklewood (11%).
- 7.17 Wembley Park and Willesden Green both again attract respectable market shares for this type of leisure activity - Wembley Park attracts a 15% market share from zone 5, and Willesden Green attracts a market share of 17% from zone 6 and 9% from its local zone, zone 8. Other centres within Brent which attract respectable market shares from their respective local zones include Colindale (15% market share from zone 4) and Kensal Rise (17% market share from zone 8).
- 7.18 Some of the centres in the Borough do not, however, play a significant role as destinations for evening or daytime dining. In particular, Harlesden (despite being a sizeable town centre in terms of total overall floorspace), Burnt Oak and Neasden are 'off radar' as destinations for this type of activity, with Harlesden and Burnt Oak not attracting a market share higher than 4% and Neasden



2%. Preston Road and Ealing Road also only attract limited market shares for these types of activity, as do the local centres of Church End and Sudbury (although in these latter two cases, this is simply a reflection of their more limited role and function).

7.19 A summary of the market share attracted to each of Brent’s centres for evening and daytime dining from each of the nine survey zones is shown in **Table 7.1**.

Table 7.1 | Summary of market shares for evening & daytime eating by centre

	Zone 1 (%)	Zone 2 (%)	Zone 3 (%)	Zone 4 (%)	Zone 5 (%)	Zone 6 (%)	Zone 7 (%)	Zone 8 (%)	Zone 9 (%)
Major centres									
Kilburn	-	-	-	-	1% / -	9% / 24%	22% / 13%	3% / 7%	-
Wembley	22% / 11%	-	-	7% / 6%	18% / 21%	-	1% / 2%	8% / 12%	-
District centres									
Burnt Oak	-	- / 3%	- / 1%	-	- / 1%	-	-	4% / -	-
Colindale	-	-	2% / 3%	5% / 15%	9% / -	-	-	-	-
Cricklewood	-	-	-	- / 6%	- / 1%	6% / 5%	5% / 11%	-	-
Ealing Rd	- / 2%	2% / -	1% / -	-	-	-	- / 1%	-	4% / 7%
Harlesden	-	-	-	-	-	1% / -	-	4% / 4%	-
Kenton	8% / -	3% / 8%	5% / 3%	1% / 4%	3% / 1%	-	-	-	-
Kingsbury	2% / -	17% / 7%	15% / 3%	14% / 1%	-	- / 2%	-	-	-
Neasden	-	-	-	-	1% / 2%	-	-	-	-
Preston Rd	2% / 12%	-	-	-	6% / 5%	-	-	-	-
Wembley Pk	5% / -	-	-	0% / 3%	10% / 15%	1%	-	0% / 9%	1% / 3%
Willesden G	-	-	-	1% / -	2% / -	9% / 17%	-	15% / 9%	-
Local centres									
Church End	-	-	-	-	-	-	-	-	-
Kensal Rise	-	-	-	-	1% / 2%	-	- / 4%	9% / 17%	-
Queens Pk	-	-	-	-	-	- / 2%	12% / 14%	-	-
Sudbury	2% / 2%	- / 2%	-	-	-	-	-	-	7% / -

Source: household survey results. Evening dining market shares shown in grey, daytime dining market shares shown in orange



Cafes

	Most popular destination for survey area	Second-most popular destination for survey area	Third-most popular destination for survey area
Cafes	Central London (13%)	Harrow (7%)	Kilburn (6%)

Source: household survey results

7.20 41% of respondents to the survey stated that they visit cafes. As our study has previously identified, uses such as cafes are making an increasingly important to the wider vitality and viability of town centres as their role and function evolves, as they assist in increasing dwell time and providing additional linked trips spend to shopping or other leisure trips. Because visiting cafes is often a localised activity, no destination attracts particularly strong survey area-wide market share, reflected in the most popular destination - Central London - having a relatively low market share of 13%.

7.21 At the zonal level, the following trends are of note:

- Wembley Park is the most popular destination for residents in zone 1 (Wembley), attracting a higher market share than Wembley town centre itself (13%), suggesting that the offer of Wembley town centre is not particularly strong for this type of leisure activity. Wembley's market share is also lower than that of Harrow's (17%), which is likely to be aligned to Harrow's popularity as a comparison goods shopping destination for residents in the Wembley area.
- Kingsbury is the most popular destination for residents in zone 2, attracting a strong market share of 30%. Harrow attracts a market share of 27%, and Kenton attracts a 9% market share. Kingsbury also attracts a market share of 11% from both zone 4 (Colindale) and zone 5 (Neasden).
- Most residents in zone 3 (Burnt Oak) look outside the Borough for visiting cafes, with Edgware attracting a 26% market share, Harrow 16% and Watford 12%. Burnt Oak itself draws a market share of just 3%.
- Kilburn draws a higher market share from zone 6 (Cricklewood, 23%) than from its local zone (zone 7, 16%). Residents in zone 7 travel to a wide variety of places for visiting cafes, meaning Kilburn has strong competition for market share. Key competing destinations are Queen's Park (13%), St John's Wood (9%), Hampstead (5%) and Bayswater (5%), as well as Central London (22%).
- The local centres of Queen's Park and Kensal Rise both have strong 'cafe cultures' and attract market share from a catchment much wider than would typically be expected from a local centre. Queen's Park draws a 13% market share from zone 7, 10% market share from zone 8 (Harlesden) and 3% market share from zone 6 (Cricklewood). Kensal Rise captures a greater market share from its local survey zone, drawing 22% from zone 8, plus 9% from zone 5 and 7% market share from zone 6.
- Colindale draws a 16% market share from its local zone (zone 4), Cricklewood a market share of 16% from its local zone (zone 6) and Harlesden draws a 13% market share from its local zone (zone 8), but in each case the influence of the centre does not extend beyond its local catchment. Harlesden in particular faces competition from a range of destinations including Queen's Park and Kensal Rise, as noted above.
- Willesden Green has a weaker offer in respect of this type of leisure activity, drawing a market share of just 7% from its local zone, zone 8. Burnt Oak, Neasden, Preston Road, Ealing Road and Sudbury also do not draw a market share of more than 10% from any zone, suggesting there is scope for improvement of their offer.



- Residents in zone 9 largely look towards centres outside the Borough, with Ealing capturing a 39% market share from this zone.

Cultural venues and facilities

	Most popular destination for survey area	Second-most popular destination for survey area	Third-most popular destination for survey area
Cultural venues and facilities	Central London (70%)	City of London (3%)	Wembley Park (3%)

Source: household survey results

- 7.22 Patterns of visits to cultural venues - which include exhibitions, art galleries, museums, theatre and live music - are dominated by Central London, which accounts for 70% of all visits to these type of facilities from across the survey area as a whole, but 88% of visits from zone 4 (Colindale) and 86% from zone 7 (Kilburn). This high level of patronage is entirely to be expected, given both the good accessibility to central London which most of the survey area benefits from, and the range and breadth of the offer available, with London a leading international destination in terms of its cultural offer. Across the survey area, 41% of respondents stated that they visit cultural facilities, although the survey results identify that this figure drops to 29% and 31% in zone 1 (Wembley) and zone 2 (Kenton) respectively, the two zones which are furthest from central London.
- 7.23 In zone 1, 37% of respondents stated that they last visited Wembley for visits to cultural facilities, with the majority of these specifically identifying Wembley Stadium. Locations in Wembley do not draw any noteworthy market share from any other zones - although clearly both Wembley Stadium and Arena draw visitors from across the country and beyond, rather than capturing local market share.
- 7.24 In the south east of the Borough, the Tricycle Theatre in Kilburn attracts market share from a number of zones, including a 7% market share from zone 6. The market shares appear low, however at the time of the survey the theatre was closed and in the midst of a two-year redevelopment, which will see it reopen in September 2018 as the Kiln Theatre.
- 7.25 The investment in the theatre will deliver an upgraded theatre auditorium, additional seating, improved sightlines, new café and upgraded façade onto Kilburn High Road. The theatre secured funding from the Arts Council, Brent Council, and wide range of supporters. The Kiln is also one of only two independent cinemas in the Borough – the cinema has remained open throughout the redevelopment works and attracts strong market shares from local residents, as discussed above.
- 7.26 Once reopened, the facility can be expected to make an enhanced contribution to the vitality and viability of the wider centre, and should be used as the ‘anchor’ to an improved food and drink offer in this part of the centre, which can capitalise on this important investment and enhance Kilburn’s appeal as an evening leisure destination, and support the Council’s aspirations to promote Kilburn as a purple flag night-time destination.
- 7.27 Other local facilities such as libraries also draw market shares from their respective local survey zones - for example Kingsbury draws a 20% market share from residents in zone 2; the new library facility in Willesden draws a 11% market share from its local zone, zone 8, as well as a 4% market share from zone 6. Wembley Library draws a 9% market share from zone 5 and a 3% market share from its local zone, zone 1. Whilst on paper these seem low percentages, these facilities are not directly competing with the Central London offer that attracts the majority of the market share, and play an important local role in allowing local residents to access services, understand local history, as well as positively enhancing the diversity of town centres.



Health & fitness

- 7.28 Patterns of visits to health and fitness facilities are highly dispersed across the survey area, to the extent that identifying a top three most popular survey-wide destinations is an academic exercise. The survey results do, however, identify the popularity of budget gym chains such as The Gym Group, which have expanded their presence in the Borough in recent years. For example, the Colindale branch of The Gym Group draws a 27% market share from zone 3, 12% market share from zone 1, and 10% market share from zone 4. The Kingsbury and Alperton branches draw 25% and 19% market share from their respective local zones (zones 2 and 9).
- 7.29 Council-operated facilities do not attract significant market shares in the survey results, with the exception of Willesden Sports Centre, which draws 29% of the market share from zone 6 and 32% of the market share from zone 8.
- 7.30 Central London attracts market share from a number of survey zones to the south of the Borough, likely reflecting the fact that residents may choose to visit health and fitness facilities close to their place of work. However Central London does not attract a significant market share from the north of the survey area (zones 1-3, from where Harrow attracts strong market shares), or the south-west of the Borough (zones 8 and 9).

Pubs & bars

	Most popular destination for survey area	Second-most popular destination for survey area	Third-most popular destination for survey area
Pubs & bars	Central London (19%)	Kilburn (8%)	Wembley (7%)

Source: household survey results

- 7.31 32% of respondents to the survey visit pubs and bars, although analysis of the survey results indicates that this fluctuates considerably by location - in zone 9 (Greenford) 44% of respondents visit pubs and bars, but in zone 1 this figure is just 19%. Overall, visits to these facilities is, for the most part, a localised activity, reflecting in the fact that the second and third-most popular destinations from across the survey area, Kilburn and Wembley, attract market shares of just 8% and 7%. Central London is, of course, more of a 'destination', and commands a higher market share of 19%, and visits may have been combined with other leisure or shopping activities.
- 7.32 When analysing the survey results at the zonal level, it can be seen that of the two major centres, Kilburn commands a reasonable market share both from its local zone, zone 7 (26%) and the neighbouring zone 6 (Cricklewood, 29%). In both instances, its main competition is central London. Wembley, however, does not attract significant market share, attracting a market share of only 14% from its local zone, and no market share of note from any other zone, although it should be noted the sample size for responses to this question was low.
- 7.33 As noted above, visits to pubs and bars are often localised activities, and this allows lower-order centres which may have a particularly attractive offer to perform strongly, making a valuable contribution to their overall vitality and viability. The strong performance of Sudbury and Preston Road noted above is an example of this; other examples include Queen's Park capturing a 12% market share from residents in zone 7, and Kensal Rise being the most popular destination for visits to pubs and bars in zone 8, attracting a 28% market share.
- 7.34 To the north of the Borough, Harrow attracts a market share of 44% from zone 3 (Burnt Oak), and to the south-west, from zone 9 Ealing attracts a market share of 52% and Greenford attracts a market share of 24%.



Family entertainment

	Most popular destination for survey area	Second-most popular destination for survey area	Third-most popular destination for survey area
Family entertainment	Tenpin, Acton (39%)	Hollywood Bowl, Finchley (20%)	Bayswater (5%)

Source: household survey results

- 7.35 22% of respondents across the survey area visit family entertainment facilities such as tenpin bowling, ice skating, laserquest, and so on; at a zonal level participation ranges from 26% in zone 8 (Harlesden) to 10% in zone 1 (Wembley). The market share is dominated by two facilities which both sit outside the survey area - Tenpin at Royale Leisure Park, Acton, which accounts for 39% of the market share from across the survey area, and Hollywood Bowl at High Road, Finchley, which accounts for 20% of the market share. Residents in the survey area are therefore travelling some distance to access these facilities, which may partly explain the relatively low levels of participation.
- 7.36 The Tenpin facility at Acton draws market share from across each of the nine survey zones, ranging from 10% in zone 7 (Kilburn) to 83% in zone 9 (Greenford). Hollywood Bowl at Finchley does not command the same survey area-wide draw, but does attract high market shares from zone 4 (Colindale, 67%), zone 6 (Cricklewood, 32%), zone 3 (Burnt Oak, 30%) and zone 5 (Neasden, 27%). The two facilities have overlapping catchments in all but zones 8 and 9. A number of other facilities attract localised market share - in zone 1, 26% of respondents stated Wembley, although it is not apparent which facilities are being referred to. In zone 8, 27% of respondents travel to the QUEENS facility on Queensway, Bayswater. Central London attract a market share of 20% from zone 7, but otherwise does not have any significant influence over the survey area for this type of leisure activity.
- 7.37 The absence of any family entertainment facilities within the Borough does, on paper, represent a qualitative gap in the commercial leisure offer, although such facilities are typically quite land intensive (and as such are often not located in town centres) and require wide catchments to be successful. However, there may be scope for smaller-scale 'boutique' facilities to be accommodated, when aligned to a strong complementary commercial leisure offer. The aforementioned QUEENS development at Bayswater is good example of this - a high street facility which combines London's only all-year round skating facility, a contemporary bowling alley, and a branch of popular casual dining restaurant MEATliquor. AllStar Lanes, which operate in Bloomsbury and Stratford, and are shortly to open a third site at Westfield in Shepherd's Bush, are another example of a more 'boutique' operator which runs venues from smaller sites.
- 7.38 The use of 'pop up'/temporary facilities, such as outdoor ice skating rinks at seasonal periods, is also increasingly popular across London and may present an opportunity in centres where space allows, such as Wembley.

Nightclubs

	Most popular destination for survey area	Second-most popular destination for survey area	Third-most popular destination for survey area
Nightclubs	Central London (72%)	Other (12%)	Camden Town (7%)

Source: household survey results

- 7.39 Only 8% of respondents to the household survey stated that they visit nightclubs, meaning a small sample size from which to review patterns of visits. The vast majority of respondents (72%) visit central London, again not an unsurprising trend given the variety of the offer. The only zone where



visit patterns are noticeably different is zone 8 (Harlesden), where only 21% of respondents visit central London, with 47% visiting Camden and 25% visiting Willesden Green.

7.40 What these results do indicate is that none of the Borough’s centres, possibly with the exception of Willesden, have a night-time economy which extends into the late night period, i.e. after the closing time of pubs and bars.

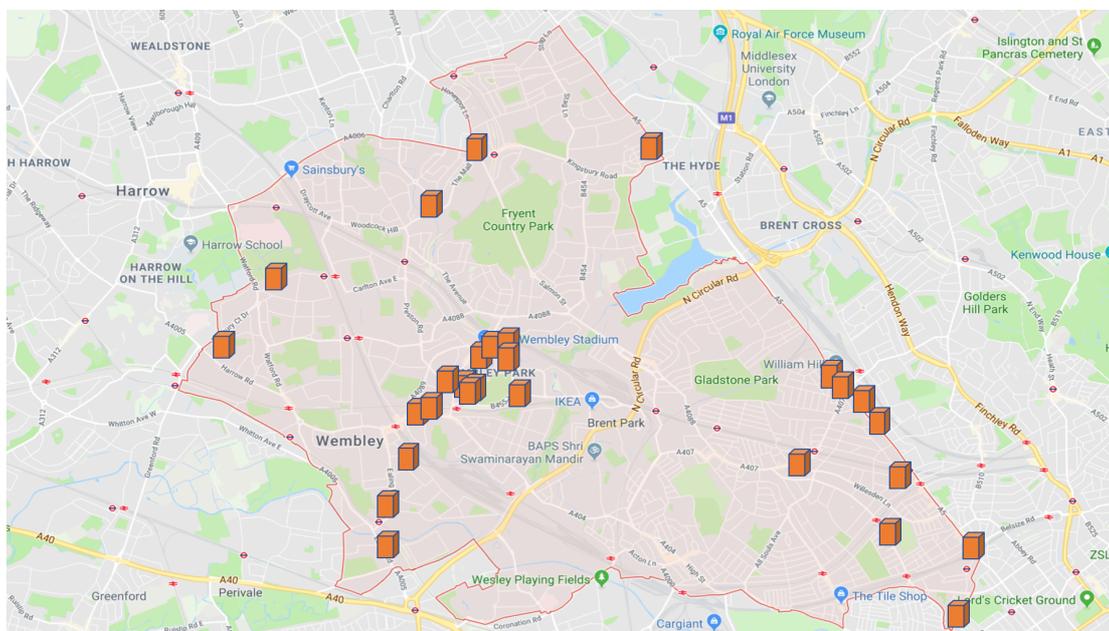
Hotels

7.41 Hotels are classified by the NPPF as a ‘main town centre use’ and the provision of a good range of hotel facilities is important in attracting visitor spend which can have potential spin-off benefits for town centres in instances where a hotel is well-sited within a centre in proximity to complementary uses such as bars and restaurants.

7.42 Research undertaken by the GLA²¹ identifies that visitor numbers to London are expected to continue to increase, and this will in turn generate a need for new hotel rooms to be provided. The GLA forecast that 58,140 net additional ‘serviced accommodation’ rooms (hotels, B&Bs, hostels and guest houses) will be required by 2040, equivalent to 2,236 rooms per year across London. When factoring in closures/loss of supply, this requirement increases to 77,019 rooms by 2040 (2,962 rooms per year) across London. The GLA have also forecast future demand for ‘serviced accommodation by Borough, identifying a requirement for 2,622 net additional serviced accommodation rooms in Brent over the period 2015-40 – the ninth-highest requirement of any of the London Boroughs.

7.43 We have undertaken a desktop assessment of existing hotel provision in the Borough, the results of which are mapped at **Figure 7.1**. This shows that hotel provision in the Borough is predominantly concentrated in the Wembley area, which is to be expected given the popularity of Wembley Stadium and Arena as venues for major sporting and entertainment events. Figure 7.1 does not show hostels.

Figure 7.1 | Existing hotel provision in Brent



Source: Urban Shape desktop research, 2018. Note: each block marker represents one hotel.

²¹ GLA (2017) Projections of demand and supply for visitor accommodation in London, <https://www.london.gov.uk/what-we-do/business-and-economy/projections-demand-and-supply-visitor-accommodation-london>



Wembley

- 7.44 There are a range of hotels in and surrounding Wembley, including:
- Four hotels (Travelodge, Best Western and two independent hotels) on or to the rear of Wembley High Road
 - Three hotels (Novotel and two independent hotels) at Wembley Park
 - Quality Hotel on Empire Way
 - Ibis, Holiday Inn and Hilton hotels and City LiveIn serviced apartments adjacent to Wembley Stadium.
- 7.45 The hotels in Wembley cater to a range of budgets, ranging from budget (a number of the independent hotels, and national operators such as Travelodge) to more premium operators such as Hilton, although the offer is largely orientated towards the more budget end of the market. A number of hotel brands are absent from the area, including Premier Inn, Mercure, Doubletree, Hampton by Hilton, Crowne Plaza, Radisson, Park Inn and Ramada, suggesting there may be scope for further provision in the area to come forward, reflecting Wembley's role and function as a tourist, sporting and entertainment venue.

Kilburn

- 7.46 Provision in Kilburn is surprisingly limited considering the size of the centre and its proximity to central London. Provision is currently restricted to the Best Western Maitrise Hotel (4*) and The Black Lion, a pub with guest accommodation which is located on the High Road. At the southern end of the centre, the Marriott Hotel Maida Vale is a large, modern hotel which is well-located to the wider retail offer of the centre. There is no representation from mid-market/budget operators in the Kilburn area (e.g. Premier Inn, Ibis, Hampton by Hilton) and we consider this to represent a qualitative gap in provision.

Elsewhere in the Borough

- 7.47 Elsewhere in the Borough, there are a scattering of further hotel facilities although provision is on the whole more limited. However a number of centres do benefit from hotel provision:
- The Kingsland Hotel occupies a prominent position on the western fringe of Kingsbury district centre, and is the only hotel serving this part of the Borough.
 - There are a number hotels within or on the edge of Cricklewood district centre, including a Travelodge, The Windmill (a pub with guest accommodation) and the 4* Clayton Crown Hotel.
 - There is a Premier Inn hotel located on the A5 at Colindale, although this falls outside the district centre at Colindale/The Hyde.
 - Provision elsewhere is predominantly restricted to smaller, independent hotels, or pubs which also offer accommodation services.

Need for future provision

- 7.48 The GLA has identified that the Council needs to positively plan for the provision of additional hotel facilities in the Borough over the course of its new Local Plan period. Whilst we have not undertaken an assessment of operator demand or requirements as part of our instruction, it is recommended that future hotel provision is directed towards the two major centres of Wembley and Kilburn, in order to assist in strengthening the role and function of these two locations as the highest-order centres in the Borough.
- 7.49 In Wembley, this will further strengthen existing provision and support Wembley's important role and function as a destination for sports and entertainment, and provision of additional hotel facilities



could also be used to help ‘knit together’ the town centre through development of appropriate sites, connecting the Stadium/Arena/LDO to the primary shopping area.

- 7.50 In Kilburn, there is relatively limited provision at present and the development of further hotel / serviced accommodation facilities would further diversify the offer of the centre and potentially generate additional footfall and spend for existing businesses, whilst also providing an attractive location for visitors wishing to access central London.

Expenditure growth in the commercial leisure sector

- 7.51 Through the application of the GLA ward-based population projections which we have used in our quantitative retail capacity forecasts to per capita spending on commercial leisure spending (provided by Experian), we can establish an indication of the expected growth in commercial leisure spending which is available to residents of the survey area.
- 7.52 It is important to note that not all of this expenditure growth can be used to support the development of new commercial facilities, because some commercial leisure spend is accounted for by holidays, day trips, special occasions and so on (which would be expected to take place outside of the survey area). However, analysis of the growth in spend is a useful indication of the scope of additional floorspace which could be accommodated. It is advised that the findings of the quantitative analysis below are considered in tandem with the qualitative needs previously identified in this section.
- 7.53 Experian identify that per capita leisure spend to be split by the categories shown in **Table 7.2** below. The proportion of total leisure spend which each category accounts for (for residents in the survey area) is also shown in Table 7.2.

Table 7.2 | Per capita leisure spend in survey area

Leisure service	Proportion of per capita spend (%)
Accommodation services (e.g. holidays, room hire)	9.26%
Cultural services (e.g. visits to cinema, theatre, museums, live music, TV subscriptions such as Netflix)	7.20%
Education (e.g. tuition fees)	18.03%
Games of chance (e.g. lottery, betting, bingo)	2.53%
Insurance (e.g. home insurance, personal insurance)	6.14%
Recreation & sports (e.g. visits to sports matches; club membership)	6.42%
Restaurants & cafes (restaurants, cafes, alcoholic drinks away from the home e.g. at pubs and bars; take-away meals)	34.66%
Social protection (e.g. residential homes, nursery, child care)	9.87%
Other services	3.23%

Source: Experian

- 7.54 Of particular relevance to this study is the growth in spend in the ‘cultural services’ sector and the growth in ‘restaurants and cafes’ sector which, as Table 7.2 shows, accounts for over one-third of the total average per capita spend on leisure services for residents in the survey area. Experian identify that annual per capita spend on leisure activities is expected to increase by 1.1% per annum between 2020 and 2024, and 1.2% per annum thereafter.



7.55 By applying the average per capita spend on each type of commercial leisure activity to the forecast population growth, the total ‘pot’ of commercial leisure expenditure available to residents of the survey area can be calculated. This exercise is set out at Table 3 of Appendix 3, and summarised in **Table 7.3**.

Table 7.3 | Expenditure growth in key commercial leisure categories, 2018-41

	2018 (£m)	2023 (£m)	2028 (£m)	2033 (£m)	2041 (£m)	Exp growth 2018-28 (£m)	Exp growth 2018-41 (£m)
Cultural services	171.76	178.73	189.53	201.18	221.32	+17.77	+49.56
Restaurants & cafes	827.21	860.79	912.79	968.89	1,065.90 (£1.06bn)	+141.67	+238.69
<i>Of which, class A3 restaurants</i>	<i>411.95</i>	<i>428.67</i>	<i>454.57</i>	<i>482.51</i>	<i>530.82</i>	<i>+42.62</i>	<i>+118.87</i>
<i>Of which, class A4 pubs & bars</i>	<i>166.27</i>	<i>173.02</i>	<i>183.47</i>	<i>194.75</i>	<i>214.25</i>	<i>+17.20</i>	<i>+47.98</i>

Source: Table 3, Tables 5a-5e, Appendix 3. Figures may not add due to rounding.

Conversion of expenditure growth to floorspace

7.56 The methodology for converting commercial leisure expenditure growth to floorspace figures is less well established than that for convenience and comparison goods retail floorspace. It is not possible to provide floorspace ‘need’ figures for cultural venues such as cinemas and theatres, nor for recreation and sporting services. The Council should therefore consider any applications for new provision of this nature on its individual merits. We have set out previously in this section that there is, in particular, qualitative scope for the Borough’s cinema offer to be enhanced through one or more smaller-format cinema developments.

7.57 Below, we provide a broad indication of the level of ‘need’ for new class A3/A4 floorspace, i.e. for cafes, restaurants, pubs and bars, drawing on the findings of the quantitative analysis set out at Tables 1 to 12 of Appendix 3. We advise from the outset however that the levels of quantitative need for these uses which we have identified should only be considered indicative because there is considerable difference in sales densities (turnovers per square metre) in these type of facilities. As with the retail capacity forecasts set out in the previous section, we again advise that forecasts beyond 2028 are indicative only.

7.58 As with the retail capacity forecast, we have identified need for each of the proposed Local Plan sub-areas. In establishing the ‘need’ for new class A3 / class A4 floorspace, we have had regard to the following points:

- We have used the findings of the household telephone survey to establish where residents are currently undertaking their visits to pubs, bars, cafes and restaurants, and converted these market shares to spending patterns by applying them to the total available spend summarised above. The household survey asks where residents undertake visits for evening dining, daytime dining, and daytime cafes separate questions (the findings of which we have discussed above); in order to calculate the ‘need’ for new class A3 floorspace we have applied



a 33.3/33.4% weighting to each of these sets of market shares, as all three categories fall within class A3 use.

- We have also made allowance for ‘commitments’ for new class A3 and A4 floorspace. As set out in the previous section, there have been a number of planning permissions granted for new floorspace in the Borough, the vast majority of which fall within the Wembley area, on ground floors of wider mixed use developments. The planning permissions are for flexible floorspace, a number of which permit the development of A3/A4 floorspace, however the exact amount which could confirm within each use class is not controlled by planning conditions. For most of the ‘commitments’ we have assumed that up to 25% of the permitted floorspace could be used for A3/A4 (with a 50:50 split to each use class); a full schedule of the assumptions we have made is provided at the foot of Table 9 of Appendix 3.
- We have, consistent with our approach for the comparison goods need assessment, allowed for inflow into the survey area for the restaurants at the LDO (this has been applied to the A3 need assessment only). We have not allowed for expenditure inflow to any other location in the Borough.
- In calculating the need for new class A3 floorspace, we have adopted a sales density (turnover per sq.m) of £6,500 per sq.m, which represents the current average sales density for existing class A3 floorspace across the Borough. For class A4 floorspace, the average sales density we have applied is £5,600, again reflecting the current average for the Borough. We have made allowance for new floorspace to improve its sales efficiency over the study period (+0.55% per annum 2020-24, +0.6% per annum 2025 onwards).

7.59 A summary of the indicative need for new class A3 floorspace is set out by sub-area at Table 10 of Appendix 3, with A4 need set out at Table 11. The need figures for each sub-area at the interval period of 2028, along with an indicative need at 2041, are summarised in **Table 7.4** below.

Table 7.4 | Summary of class A3 and class A4 need by sub-area

Sub-area	Key centres	Class A3 (restaurants/cafes) need		Class A4 (pubs/bars) need	
		2028 (sq.m)	2041 (sq.m) (indicative)	2028 (sq.m)	2041 (sq.m) (indicative)
Central	Wembley Park	-8,900*	-8,600*	-10,500*	-10,500*
North West	Kenton, Preston Road	100	200	100	100
North	Burnt Oak, Colindale, Kingsbury	200	400	100	200
East	Neasden	0	0	0	0
South East	Kilburn, Cricklewood, Willesden Green, Kensal Rise, Queen’s Park	600	1,000	300	500
South	Harlesden, Church End	0	100	0	0
South West	Wembley, Ealing Road, Sudbury	-100	100	-300	-200



*Source: Tables 10 & 11, Appendix 3. Figures may not add due to rounding. *We have included of the committed floorspace for the Wembley / Wembley Park area within the need figures for the Central sub-area, as this is where the majority of development sites are located. Need figures should be considered alongside those for the South West sub-area. Owing to the flexible consent granted to most permissions in this area, figures should be reviewed once commitments are implemented.*

- 7.60 Table 7.4 shows that at 2028 there is a positive requirement for new class A3 floorspace in the North West, North and South East Brent sub-areas. In each case the identified requirements are relatively limited, with the highest requirement of 600 sq.m falling in the South East Brent sub-area. In the Central Brent sub-area there is a substantial negative requirement because of the considerable amount of consented pipeline flexible floorspace in Wembley, for which we have assumed part will come forward as class A3 floorspace (and class A4, in certain instances). These need figures should be reviewed once this consented floorspace has been implemented and the exact floorspace mix is known. If none of this floorspace comes forward for A3 use, the A3 need for the Central Sub Area is 400 sq.m at 2028, and 600 sq.m at 2041.
- 7.61 There is also a positive requirement at 2028 for new class A4 floorspace in the same three sub areas (North West, North and South East Brent). For the reasons set out above, there is again an identified over-supply of floorspace in the Central Brent sub area; if none of the pipeline floorspace comes forward for A4 use, there is a positive requirement for the Central Brent sub-area of 100 sq.m over the period to 2041.
- 7.62 As noted above, these figures should be considered indicative only owing to the considerable variation in sales densities between different class A3 and A4 operators and, as with the retail capacity forecasts set out in the previous section, forecasts beyond 2028 should be subject to review throughout the Council's new Plan period. The findings should also be considered alongside our qualitative recommendations and the wider trends which this study has identified. The role and function of town centres is evolving and cafe and restaurant uses are becoming an increasingly important component of the offer, helping to extend dwell time during the day and extend the life of a centre in the evening.
- 7.63 A number of centres in the Borough - particularly the local centres of Queen's Park, Kensal Rise and Sudbury, as well as the district centre of Kingsbury, are performing strongly as evening economy destinations but the survey results show that both Wembley and Kilburn do not capture particularly strong market shares for evening economy uses. Therefore, the absence or low levels of quantitative need should not stop these centres from developing a strategy to enhance and diversify their range of early and late evening economies to benefit the overall vitality and viability of the centre.



8 |

Summary & conclusions



8. Summary & conclusions

- 8.1 This study has set out a quantitative and qualitative assessment of the future retail and commercial leisure needs of the Borough, to inform the preparation of the Council's new Local Plan. The study forms part of a suite of three documents (Documents A, B and C) which together combine to provide the Borough's evidence base for matters relating to retail and town centre. It should be read alongside the Brent Town Centre Health Checks Study which forms Document B of the retail and town centres evidence base. The findings of Documents A and B are then used to inform the Brent Retail & Leisure Strategy paper, which forms Document C to the evidence base.
- 8.2 The findings of our study have been informed by a household telephone survey of shopping and leisure patterns across the Borough, as well as adjacent areas which may look towards centres in the Borough for their shopping and leisure needs, which we refer to as the 'survey area'. This was completed in January 2018, and is used to establish patterns of visits for food and non-food shopping, as well as different commercial leisure activities such as visiting cafes, restaurants, cinema and cultural venues. The results of the survey area show the extent to which centres surrounding the Borough are competing for expenditure with the network of centres in Brent. The findings of the study have also been informed by site visits to each of the town, district and local centres in the Borough, and a range of industry-adopted secondary data sources.

Policy context

- 8.3 The study has been prepared with full regard to the National Planning Policy Framework (NPPF), published by Government in 2012, and updated in 2018. The NPPF advocates a 'town centres first' approach, and requires planning policies to positively promote competitive town centre environments and manage the growth of centres over the plan period. At the London level, the Draft London Plan (DLP), published in 2017, sets out the economic, environmental, transport and social framework for the development of London over the next 20-25 years. This strategic framework in turn guides boroughs' development plans, to ensure that the Mayor and Boroughs are 'working towards a shared vision for London'. The DLP is based on the concept of 'good growth' – growth that is socially and economically inclusive and environmentally sustainable. The DLP identifies a number of 'Ongoing Opportunity Areas' across Greater London, including three which fall wholly or partly within Brent at Wembley, Burnt Oak/Colindale and Brent Cross/Cricklewood.
- 8.4 The DLP sets out the approach to the management of the town centre network across Greater London, and is supported by a classification of each centre in the town centre hierarchy at Appendix 1. The hierarchy of centres is headed by two 'International' centres (West End, Knightsbridge) and 14 Metropolitan Centres, followed by 'Major' and 'District' Centres, and locations which fall within CAZ Retail Frontage. The DLP states that International, Metropolitan and Major Centres should be the focus for higher-order comparison goods retailing; district centres should focus on the 'consolidation of a viable range of functions', particularly convenience goods retailing, leisure, local employment and workspace. District centres should also 'address the choice of new forms of retailing and securing opportunities to realise their potential for higher-density mixed use residential development and improvements to their environment'.
- 8.5 The following centres in Brent are identified in the DLP centre hierarchy:
- **'Major' centres** - Wembley and Kilburn (Kilburn is split between Brent and Camden)
 - **'District' centres** - Ealing Road, Harlesden, Neasden, Preston Road, Wembley Park, Willesden Green, Kingsbury (Brent/Harrow), Kenton (Brent/Harrow), Colindale/The Hyde (Brent/Barnet), Cricklewood (Brent/Barnet/Camden) and Burnt Oak (Brent/Barnet/Harrow).



- 8.6 In addition to the centres listed above, the study has also considered four policy-defined local centres in the Borough at Church End, Kensal Rise, Queen’s Park and Sudbury.

The changing role of town centres

- 8.7 The model of the traditional town centre is arguably being challenged more currently than at any time in its history. The role and functions of town centres at all levels of the hierarchy is going through a period of substantial change as a headwind of factors including changing consumer shopping habits, the entering of a period of economic uncertainty as a result of the UK’s decision to leave the European Union, the continued role of online shopping (which is, in the case of non-food shopping, significantly above average in Brent), all combine to present new challenges for town centres. Sectors which have emerged in recent years – such as the casual dining restaurant sector – are now facing their own challenges and there are signs this market may be reaching saturation.
- 8.8 There are opportunities for town centres – for example click & collect can generate linked trips spend, and the change in convenience shopping habits towards ‘little and often’ shopping trips – but town centres will increasingly look beyond retail as their sole generators of footfall in future years. Successful town centres will be those which can provide a broad range of uses which cement and enhance their appeal as ‘destinations’, rather than solely places to come for shopping. Higher-order town centres (such as Kilburn and Wembley) in particular will need to ensure a diverse, vibrant retail, leisure, residential and employment offer to cement and enhance their long term vitality and viability.

Competing centres

- 8.9 Brent is surrounded by a number of ‘higher-order’ retail destinations - including Shepherd’s Bush and Harrow, which are defined as Metropolitan Centres in the Draft London Plan (2017), as well as Brent Cross Shopping Centre, which the Draft London Plan identifies as a future potential Metropolitan Centre (although it is currently unclassified). Many residents of Brent also benefit from good access to central London and its internationally-renowned retail, leisure and cultural offer. The presence of these shopping destinations outside the Borough boundaries means that loss of expenditure, particularly in terms of comparison goods spending, is inevitable, as patterns of shopping are not ‘closed’ systems.
- 8.10 The household survey undertaken in support of this study identified the most popular destination for comparison goods shopping for residents in the survey area is Brent Cross / Staples Corner, which draws £523.20m of comparison goods spend from the survey area. This is followed by Central London (£177.44m) and Harrow (£145.23m). The locations within Brent which attract the highest comparison goods turnovers are Kilburn (£99.60m) and Wembley (£48.11m). Shepherd’s Bush, which includes the Westfield London development which was not trading at the time of the preceding household survey (in 2008), draws £78.85m of spend. A Phase 2 extension to Westfield London has recently opened, subsequent to completion of the household survey.
- 8.11 Brent Cross has increased its market share from the survey area by 8.3 percentage points since the 2008 survey and the significant investment in the extension of Brent Cross which **could potentially come forward over the study period may result in** further market share being lost. Central London’s market share has declined since the 2008 survey, likely as a consequence of the opening of Westfield London, whilst Harrow’s has remained unchanged.

Shopping patterns

- 8.12 Using population and per capita expenditure estimates from Experian, we estimate there to be £1.66bn of comparison goods spending available to residents of the survey area. The household



survey results identify that 61.8% (£1.03bn) of this spending is retained by centres and stores in the survey area; this 'retention rate' is a noticeable increase from the retention rate of 51.2% identified in the 2008 Study. It is, however, skewed by the inclusion of Brent Cross within the survey area, and centres and stores within Brent itself only account for 28.6% of total comparison goods spend. Nevertheless, it is important to remember that survey areas rarely retain all of the comparison goods expenditure which is available to them – and in the case of Brent, the presence of major retailing destinations such as Brent Cross and higher-order shopping destinations such as Harrow and Central London a short distance outside the survey area boundary means loss of comparison goods spend is inevitable.

- 8.13 The most popular destinations for comparison goods shopping, and the turnover they draw from the survey area, are as follows:
- **Brent Cross/Staples Corner** (£523.20m of comparison goods spend from survey area)
 - **Central London** (£177.44m of comparison goods spend from survey area)
 - **Harrow** (£145.23m of comparison goods spend from survey area)
 - **Kilburn** (£99.60m of comparison goods spend from survey area)
 - **Shepherd's Bush (incl. Westfield London)** (£78.85m of comparison goods spend from survey area)
 - **Wembley** (£48.11m of comparison goods spend from survey area; excludes London Designer Outlet)
- 8.14 Kilburn and Wembley town centres have the highest comparison goods turnovers, reflecting their role as 'major' centres, although Kilburn's turnover is approximately double that of Wembley. Kilburn faces competition for 'market share' from Central London and Brent Cross, but positively the proportion of market share which the centre claims from its local catchment has increased marginally since the 2008 Study. Wembley has to compete with a wider number of larger/higher-order centres and destinations, including Harrow, Brent Cross, Central London and Shepherd's Bush. The proportion of market share which Wembley draws from its local catchment has halved since the 2008 Study. Whilst developments such as the opening of the London Designer Outlet have enhanced its retail offer, there is a need for improved integration between the new developments and the 'historic' town centre to enable all areas of the centre to benefit.
- 8.15 The LDO has a different catchment to the rest of the town centre, reflecting its more specialist retail offer which enables it to act as more of a 'destination'. 54% of the visitors to the LDO originate from outside the survey area.
- 8.16 Brent's other centres have lower comparison goods turnovers; this reflects the fact that many of the district centres they have a more localised shopping function which is more oriented towards meeting day-to-day shopping needs rather than being non-food shopping 'destinations'. However, three district centres (Harlesden, Kingsbury and Cricklewood) have comparison goods turnovers in excess of £20m, a reflection that in these cases, the comparison goods offer in the centres is more substantial.
- 8.17 In terms of convenience goods shopping, the household survey results indicate that notwithstanding the changes in convenience goods shopping patterns which have taken place in recent years, the majority of food shopping in the survey area continues to be undertaken in large superstores, most of which are not located within defined centres. There is currently £1.21bn of convenience goods spend available to the survey area. Of this, £916.85m (74.5%) is spent within main foodstores in the survey area. A further £35.78m (2.9%) is spent at local / specialist convenience goods shops in Brent's network of town, district and local centres.



- 8.18 The foodstores drawing the highest turnover from residents in the survey area by some margin are Asda stores in Wembley (£89.01m convenience goods turnover) and Colindale (£74.92m), which was also the case in the 2008 Study. Branches of Sainsbury's in Kilburn, Alperton, Kenton and Willesden, and a branch of Morrisons in Queensbury, each draw more than £30m in convenience goods spend from the survey area. The majority of convenience goods floorspace in the survey is 'over-trading' when compared to operator company average levels, although two superstores - the Tesco Extra at Brent Park and a recently-opened Morrisons at Colindale, both appear to be trading at below average levels.
- 8.19 Brent is a diverse Borough and a number of the centres play important roles as destinations for specialist ethnic and world food and non-food shopping, with the household survey identifying Kingsbury, Harlesden, Ealing Road and Wembley as being important destinations for ethnic food shopping, and Ealing Road and Wembley both also important roles for ethnic non-food shopping. Outside of the survey area, centres such as Harrow and Southall act as competition for spending. For Kingsbury and Ealing Road in particular, the role of ethnic food/non-food retailing appears to make a significant contribution to the overall attraction of the centre.
- 8.20 Markets (both day-to-day produce and household goods markets, and specialist markets such as food/grocery markets, farmers markets or craft markets) - can make an important contribution to town centre vitality and viability, acting as footfall generators and providing opportunities for linked trips spend. In the case of specialist markets, they can provide an additional reason to visit a centre which differentiates from its 'day to day' offer. The network of centres across Brent do not host any street markets of significant scale, and most centres – Cricklewood, Colindale, Ealing Road, Harlesden, Kenton, Kingsbury, Neasden, Preston Road, Wembley Park and Willesden Green – do not have any markets at all. The linear nature of many of these centres, along busy arterial routes, limits the options for the presence of market facilities, however in some centres where there is part-pedestrianisation, such as Harlesden for example, there may be scope for the introduction of limited street market facilities.

The 'need' for new retail and commercial leisure floorspace

- 8.21 In identifying the quantitative need for new retail and commercial leisure (class A3/A4) floorspace, we have sub-divided the Borough into seven sub-areas, reflecting the approach which the Council intends to take forward in the preparation of its new Local Plan.
- 8.22 In identifying future retail and class A3/A4 capacity, it is necessary to take into account 'commitments' for new retail floorspace, which will act as 'claims' on the amount of comparison (and convenience) spending which is available to support new floorspace. All of the commitments we have incorporated into our analysis are flexible permissions, which allow the development of a range of class A retail uses, as well as in most cases class D2 leisure uses and other types of floorspace. This means that the exact amount of floorspace which will come forward within each permission is not controlled through planning conditions, and therefore cannot be accurately quantified. The implementation of these commitments and the amount of floorspace which comes forward for comparison, convenience and other A-class uses should be monitored over the course of the forthcoming plan period. The majority of the 'committed' floorspace is in the Wembley area, which means there is an identified over-supply of floorspace of A1 convenience, A3 and A4 floorspace in the Central sub-area at 2028.
- 8.23 Based on the commitments assumptions we have adopted, the following levels of quantitative need over the period to 2028 are identified (**Table 8.1**). It is recommended that figures beyond 2028 which we have identified in this report are treated as indicative, and should be reviewed throughout the Plan period.



Table 8.1 | Summary of quantitative retail & class A3 and A4 leisure needs at 2028

Sub-area	Key centres	Class A1 Comparison goods need at 2028 (sq.m net)	Class A1 Convenience goods need at 2028 (sq.m net)	Class A3 Restaurants/ Cafes need at 2028 (sq.m)	Class A4 Pubs/Bars need at 2028 (sq.m)
Central	Wembley Park	300*	-1,800*	-8,900*	-10,500*
North West	Kenton, Preston Road	900	500	100	100
North	Burnt Oak, Colindale, Kingsbury	-500	1,600	200	100
East	Neasden	500	200	0	0
South East	Kilburn, Cricklewood, Willesden Green, Kensal Rise, Queen's Park	7,200	7,500	600	300
South	Harlesden, Church End	4,800	900	0	0
South West	Wembley, Ealing Road, Sudbury	1,800	6,100	-100	-300
Total	-	14,900	15,100	-	-

*We have included of the committed floorspace for the Wembley / Wembley Park area within the need figures for the Central sub-area, as this is where the majority of development sites are located. Need figures should be considered alongside those for the South West sub-area. Owing to the flexible consent granted to most permissions in this area, figures should be reviewed once commitments are implemented.

- 8.24 The 'baseline' capacity forecasts set out above need to be considered alongside the qualitative needs to improve the retail and commercial leisure offer of the centres in the Borough, and an absence or limited quantitative capacity does not necessarily mean there is not scope for the offer of centres to be improved.
- 8.25 This is particularly the case in respect of the commercial leisure offer in the Borough's centres, which in many cases would benefit from enhancement and diversification to bring about increased dwell-time during the daytime and support enhanced early and late evening economies. A number of centres in the Borough - particularly the local centres of Queen's Park, Kensal Rise and Sudbury, as well as the district centre of Kingsbury, are performing strongly as evening economy destinations but the survey results show that both Wembley and Kilburn do not capture particularly strong market shares for evening economy uses. Therefore, the absence or low levels of quantitative need should not stop these centres from developing a strategy to enhance and diversify their range of early and late evening economies to benefit the overall vitality and viability of the centre.
- 8.26 Our assessment has also identified that there is a qualitative scope for enhancement of other commercial leisure uses in the Borough, particularly in respect of cinemas, for which the Borough is currently poorly provided for. There is an established network of 'multiplex' cinemas surrounding the Borough (plus a Cineworld within the LDO) which all attract high market shares from residents in the Borough. We would expect operator demand for a similar-sized facility in the Borough to be limited



on account of this existing network of facilities – however consider there to be scope for the accommodation of smaller, ‘boutique’ cinema facilities (comparable to those present in Kilburn and Kensal Rise) in the central and north of the Borough (i.e. outside the South East Brent sub-area). There may also be scope for the provision of small-scale ‘family entertainment’ facilities, such as bowling, given that residents in the survey area are currently travelling considerable distances (to Acton and Finchley) to access these facilities.

- 8.27 The GLA has identified that Brent needs to positively plan for the provision of additional hotel facilities over the course of its new Local Plan period. Whilst we have not undertaken an assessment of operator demand or requirements as part of our instruction, it is recommended that future hotel provision is directed towards the two major centres of Wembley and Kilburn, in order to assist in strengthening the role and function of these two locations as the highest-order centres in the Borough.
- 8.28 In **Document C**, we draw on the above findings to develop a series of Borough-wide and sub area-specific recommendations for the Council to take forward into their new Local Plan.