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March 2006

HARROW COUNCIL

Harrow Retail Study

Report

Appendices

This report has been prepared by Donaldsons LLP. A List of the Partners of the firm is available for inspection at the principal office – 48 Warwick Street, London, W1B 5NL.

Contents

1 Introduction

1.1 Donaldsons was commissioned on 15th April 2005 by Harrow Council to undertake a Retail Study of Harrow. The purpose of which was to guide decisions on the amount and location of future retail floorspace to be identified in the LDF. The study examines retail growth until 2016 to cover the timescale of the LDF.

1.2 The aim is to prepare a study that will ensure that Harrow can fulfil its potential as a thriving retail area, as well as respond to increased competition from other centres such as Watford, Ealing and Uxbridge. The study focuses principally on Harrow town centre.

1.3 In particular, the study seeks to:

- Inform the LDF process.
- Improve understanding of the patterns of retailing in the Borough and how the various retail sectors can be strengthened.
- Assess potential development sites for their suitability to be developed for retail.
- Provide a healthcheck on Harrow Town Centre

1.4 This assessment has examined the strengths and weaknesses of the town centre in terms of current mix of shops, services and other land uses, and the identification of gaps in provision. A variety of data sources have been used in undertaking this study including Experian Goad data on shop floor space, the Focus database for information on retailers' requirements and the Valuation Office (VOA) for information on shop property investment yields. We have also undertaken an on-street interview survey of shoppers and other town centre users in Harrow town centre; and a household interview survey of shopping patterns in Harrow and its catchment area.

1.5 Section 2 of this report contains a 'health check' of Harrow town centre drawing on the indicators set out in Chapter 4 of PPS 6. In summary these indicators are:

- Diversity of uses;
- Retailer representation;
- Shopping rents;
- Commercial yields on non-domestic property;
- Proportion of vacant street level property;
- Pedestrian flows;
- Accessibility;
- Customer views and behaviour;
- Perception of safety and occurrence of crime; and
- State of town centre environmental quality.

1.6 In order to assess the vitality and viability of the centre, we have drawn upon the Experian Goad data, combined with observations gained from site surveys and commentary from shoppers and other centre users, where appropriate. In order to provide information on customer views and behaviour, we designed and commissioned an on-street survey of shoppers and other users of Harrow town centre. This assessment provides a broad indication of the viability and vitality of the town centre, and of the recent trends in key indicators.

1.7 Section 3 sets out our findings on retailer demand following our correspondence and discussions with the main food retailers, and analysis of retailers' requirements. This work was undertaken in order to provide a check on our retail capacity forecasts; because if operators are interested in locating in the area, this can be a further indication of need for new retail floorspace.

1.8 Section 4 describes our forecasting of retail capacity in the study area. It describes the technical basis of our RECAP forecasting Model; and sets out the retail capacity forecasts and our overall assessment of the need for new retail development in the town centre. Section 5 identifies potential retail sites in the area and assesses them with regard to their retail potential as future sites for development.

1.9 Our principal findings and conclusions on each topic are set out at the end of each section of the report, and are summarised in Section 6.

2 The Vitality and Viability of Harrow Town Centre

2.1 In this 'healthcheck' we consider the vitality and viability of Harrow town centre drawing on the indicators set out in chapter 4 of PPS6. In order to assess the vitality and viability of the centre, we have drawn upon Experian Goad data, combined with the observations gained from the site visits and commentary from shoppers interviewed during our on-street survey.

2.2 Harrow town centre contains 318 retail and service units. The centre's primary shopping frontage or traditional 'High Street' is on St Ann's Road, which is a pedestrianised shopping area. The centre has two purpose-built indoor shopping malls. The St Ann's Shopping Centre is located on the mid part of St Ann's Road. The St George's Shopping Centre is located at the western end of St Ann's Road. A summary of the main 'areas' of the centre is included in Table 2.1.

Table 2.1: Summary of main shopping areas in Harrow Town Centre

Street	Description
St Ann's Road	Pedestrianised, primary shopping street in the centre of Harrow.
Station Road	Long shopping street running from north to south, predominantly a secondary shopping area. (with the exception of Debenhams)
College Road	Predominantly a secondary shopping street on the periphery of the retail core, running parallel to St Ann's Road.

Source: Donaldsons, 2005

Diversity of Uses

2.3 Table 2.2 sets out the occupancy of the units within Harrow town centre in terms of the retail categories for convenience, comparison, service and vacant units. This is set against the national average for town centres to provide a comparison.

Table 2.2: Retail and services provision in Harrow town centre by number of units

Type	No of Units	% of Total	National Average %	Variance %
Comparison	159	52	48	4
Convenience	21	7	9	-2
Service	111	36	30	6
Vacant	17	6	11	-5
Total	308			

Source: Experian Goad, April 2005

Notes: Percentages do not always sum to 100% because of rounding.

2.4 Table 2.2 demonstrates that the number of comparison goods retail units is 4% higher than the national average of 48%. The number of convenience goods units is slightly (2%) less than the national average of 9%. There is a higher percentage of service units in Harrow than the national average (6% above). The vacancy rate is much lower, than the national average, showing a –6% variance.

2.5 Table 2.3 shows the amount of gross ground floor floorspace occupied by the various sectors within Harrow Town centre.

Table 2.3: Retail and service floorspace provision in Harrow Town Centre

Type	Sq m	% Floorspace in Town Centre	% gross floorspace UK	Variance %
Comparison	49,890	61	53	8
Convenience	8,920	11	17	-6
Service	17,470	21	20	1
Vacant	5,020	6	8	-2
Total	81,300			

Source: Experian Goad, April 2005

Notes: Percentages do not always sum to 100% because of rounding.

2.6 There is a total of 81,300 sq m of gross ground floor floorspace within Harrow town centre. Comparison goods retailers occupy 61% of this floorspace, which is 8% above the national average. Convenience goods retailers occupy 11% of the total floorspace, which is 6% less than the national average. The amount of floorspace occupied by the services sector is very similar to the national average. There is 2% less vacant floorspace in Harrow than the national average.

2.7 The analysis in Tables 2.2 and 2.3 shows that Harrow town centre is a strong retail centre, particularly for comparison goods shopping. It is less strong for services, reflecting its more important role as a Metropolitan centre in the Greater London hierarchy of town centres. It provides a limited food shopping offer (although the nearby Tesco Superstore on Station Road supplements the convenience goods provision in the town centre core). The shop vacancy rate is encouragingly low.

2.8 The low budget retail offer of Harrow is evident, predominantly in Harrow market, which operates every Thursday. In terms of the services sector, there are a number of A2 professional and financial services present amongst the comparison goods retailers in the centre, including HSBC, Natwest and Abbey. In addition, a number of fast food outlets, cafes and restaurants, and bars are also located in the centre. There are some convenience stores in the centre, including a 6,350 sq m (gross) Tesco, a 930 sq m M&S Foodhall and a 770 sq m Iceland.

2.9 Harrow town centre does not contain many public buildings. However the town centre does contain a variety of uses which include a bingo hall, places of worship, hotels, three gyms, two cinemas and various office developments.

Retailer representation

2.10 A multiple retailer is defined as being part of a network of nine or more outlets. The presence of multiple outlets can enhance the appeal of a centre to many shoppers. In April 2005, 173 of the 318 units in Harrow town centre, were occupied by multiple retailers (54%). This figure is well above the national average of 34%, indicating that this is a strong centre, popular with major retailers (although the national average also includes a large number of smaller centres in which there are few multiple retailers).

2.11 According to Focus, Harrow has 60% of the top 20 retailers[1] present including Boots, Marks and Spencer, Argos, Debenhams, WHSmith, BHS, Next, Dixons, Superdrug, Woolworths, New Look, HMV and Dorothy Perkins. Those not represented at the date of survey include Littlewoods, John Lewis, Lloyds Pharmacy, Wilkinson, Co-op Department Stores, Rosebys and Waterstones. The main multiple retailers within Harrow are situated along St Ann's Road and within St Ann's Shopping Centre and St George's Centre.

2.12 Retailer demand to locate in a town centre provides a good indication of the health of a town centre. Table 2.4 highlights the current requirements from comparison goods retailers and service businesses for space in Harrow Town Centre. The minimum figures are the totals of each company's minimum, and the maximum the totals of their maxima. Altogether, a total of 91 retailers and service businesses have expressed a demand for floorspace within Harrow town centre.

Table 2.4: Retailer Requirements Within Harrow Town Centre

	Comparison	Convenience	Service	Total
No. of requirements	47	9	35	91
Sq m Minimum	1,488	2,460	19,456	23,403
Sq m Maximum	2,776	5,506	28,807	37,088
Sq ft Minimum	16,011	26,468	209,342	251,821
Sq ft Maximum	29,870	59,240	309,961	399,071

Source: Focus, 2005

2.13 Convenience goods retailers such as the main supermarket operators and small independent convenience store retailers do not usually post their requirements on databases such as Focus. However, in this case 9 convenience retailers have registered requirements, including wine merchants, healthfood shops and two discounter foodstores, Farmfoods and Aldi. To gauge demand for floorspace from the other main foodstore operators we have undertaken a postal survey (with follow-up by telephone). The results of this survey are set out in section 3 of this report.

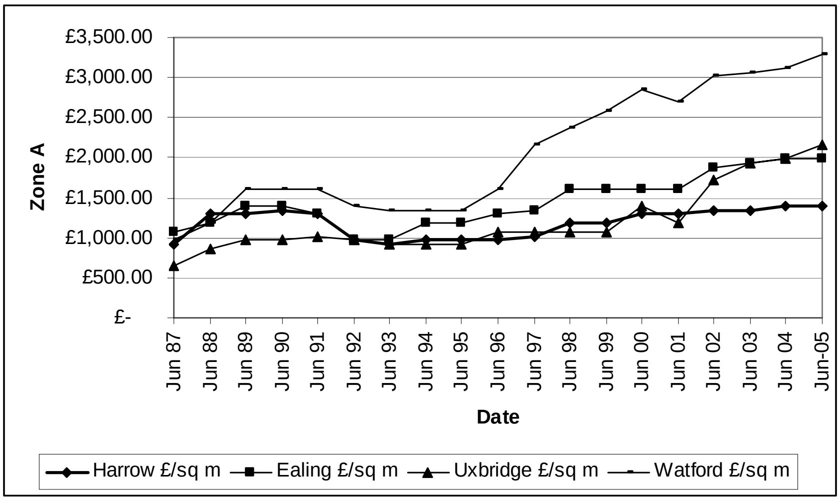
[1] The definition of top 20 retailers is that these are the top 20 comparison goods multiples ranked by ORC's (international research company) forecast of average town centre sales for individual Retailers within Great Britain.

Prime Shop Rental Values

2.14 The level of rent which retailers are prepared to pay for retail space within a centre is an indication of the perceived attractiveness of that centre (although other factors such as the availability of floorspace have an impact on rental value). Rental values can also provide a measure of the primacy of streets and locations within a town centre.

2.15 Zone A rental values for a shop 'of optimum size and configuration in prime pitch' within Harrow are currently about £1,399/sq m (Focus, 2005). As Graph 2.1 shows, the rental values within Harrow have been steadily increasing since 1996, after a sharp fall between 1991 and 1992, due to the recession at that time. The steady long term growth indicates improving prosperity as a shopping centre. Harrow is underperforming in comparison with the surrounding centres, particularly Uxbridge and Ealing which are similar sized centres and show significant growth in recent years.

Graph 2.1: Prime Zone A Shop Rental Values in Competing Centres



Source: Focus 2005

2.16 Table 2.5 shows Zone A rental values for surrounding centres. Harrow has the lowest Zone A rental value which is an indication of a weaker retailing centre. Uxbridge and Watford have considerably higher Zone A rental values than Harrow. Watford has a larger and very strong town centre and is Harrow's main competitor; containing a large, purpose built shopping centre, The Harlequin Centre, which has John Lewis as an anchor store. Brent Cross, as a free standing regional shopping centre has substantially higher Zone A rental values.

Table 2.5: Prime Zone A Shop Rental Values in Neighbouring Centres

Town	Zone A / sq m
Harrow	*£1,399*
Ealing	£1,991
Uxbridge	£2,152
Watford	£3,282
Brent Cross	£4,573

Source: PMA, 2004

Commercial Yields

2.17 The commercial yield on non-domestic property is an indication of the confidence of investors in the rental growth potential of a town centre. However, both Government and the RICS have warned that this requires careful analysis and its limitations must be understood. The yield on a property investment represents the return (in the form of rent) on capital to an investor. As property investments do not usually produce a fixed income (i.e. rents are reviewed – usually upwards only - according to market conditions, under the terms of the property's lease), the greater the prospect of future rental growth, the lower the initial yield which an investor would be prepared to accept. Conversely a higher yield reflects a lower expectation of future rental growth prospects. Yields are therefore an indicator of expectations of rental growth and thus of the general economic prospects for a town centre.

2.18 Research by the VOA has tracked shop property investment yields from 1994 – 2005. From the data supplied by the VOA, yields in Harrow have remained at a consistent 6% from 1995 to 2000. From 2001 yields have crept up slightly to 6.25% which is the current recorded level. This slight increase could indicate a small reduction in confidence in the investment market in Harrow in recent years, coming at a time when interest rates generally have been falling.

2.19 Table 3.8 shows the retail yields for the main competitors of Harrow in 2005. Harrow is on a par with Ealing Broadway, but Watford and Brent Cross show signs of a stronger shop investment market (although the latter is a somewhat artificial comparison because it is owned as a single large investment).

Centre	Yield
Harrow	6.25%
Uxbridge	6%
Wembley	7%
Watford	5.5%
Brent Cross	4.5%
Ealing Broadway	6.25%

Source: VOA, 2005

2.20 From the yield and rental market information, the indicators are showing that Harrow is performing less well in retail terms than its principal neighbouring centres of similar status.

Growth within the rental market has slowed down in recent years; and yields have crept up slightly probably reflecting reduced expectations of future rental growth.

Vacant Retail Property

2.21 The proportion of vacant street level property provides a strong indication of the health of a town centre. It should, however, be considered with a degree of caution as vacancies can arise even in the strongest town centres, particularly where properties are undergoing alteration. According to Experian Goad, Harrow town centre has 17 vacant outlets, which account for 5% of total retail and services' units in the town centre. In comparison with the national average of 10%, Harrow has a very low vacancy rate. Most of the vacant units are located within the secondary shopping area on Station Road. The relative lack of vacancies in the prime retail area indicates that this retail core of the town centre is maintaining its attractiveness to retailers.

Pedestrian Flows

2.22 The research company PMRS, has carried out a pedestrian flowcount in Harrow in 2004. A copy of the full report can be found in Appendix 1. Pedestrian flows were counted at thirty locations along College Road, Station Road, Peterborough Road, St Ann's Road and St. Georges Shopping Centre. The counts took place on the 11th and 12th of January (Friday and Saturday) 2004. It should be noted that this information provides a 'snapshot' of pedestrian flow data, as opposed to providing trend data to establish pedestrian flow patterns over time.

2.23 The streets with the lowest recorded footfall i.e using an index of 50% as the cut off point run from the north to the south of the town centre and the pattern of footfall clearly marks the pattern of secondary shopping frontage. The index shows a low footfall from Peterborough Road through Station Road up towards Tesco. Particularly, the footfall is low on the right hand side of the road (i.e the opposite side to where Debenhams is sited). Low footfall is also recorded on the western edge of the town centre on Kymberley Road between the St George's Centre and the multistorey car park. Those areas with an index of between 50% and 100% are located on the periphery of the prime shopping area, located on College Road and on the right hand side of Station Road.

2.24 The busiest recorded footfall was along St Ann's Road, outside Next, with a percentage of average flow over the two days of 314% (benchmarked at the average for the town centre as 100%). The primary shopping areas of St Ann's Road, St George's Centre and St Ann's Centre all had flowcounts indexed at greater than 100%. The data indicates that Debenhams acts as an anchor for the town centre at the eastern end, with the St George's Shopping Centre drawing pedestrians towards the western end. This data is corroborated by our site inspections where the shops in and around St Ann's Shopping Centre and St. Georges Shopping Centre were amongst the busiest areas within Harrow. Shops near the St Ann's Centre on St Ann's Road also attracted more pedestrians.

Accessibility

2.25 The location of Harrow's bus station, adjacent to Harrow-on-the-Hill railway station forms a public transport hub to the south of the town centre. This ensures that Harrow is easily accessible by public transport from a variety of locations within and outside the Borough. Harrow has fifteen bus routes running to various destinations including Golders Green, Watford Junction, Ruislip, Heathrow, Edgware, Brent Cross Shopping Centre and Wembley Central. There are bus stops located throughout the town centre.

2.26 The nearest underground station to the centre is Harrow-on-the-Hill, located on College Road, the rear entrance to the station is from Lowlands Road. Harrow-on-the-Hill is within Zone 5 of the Underground network. The Metropolitan Line, linking Aldgate in Central London with Amersham, Chesham, Watford and Uxbridge in the west, serves the station. The Borough as a whole, is also served by the Jubilee Line, the Northern Line, the Piccadilly Line and the Bakerloo Line. Harrow therefore, is very well connected to central London.

2.27 Chiltern Railways provide overland train services through Harrow-on-the-Hill station, linking Amersham in the west with Marylebone Station within Central London. A further major train station within the Borough is Harrow and Wealdstone. Train services from this station run from Watford Junction to London Euston. A small number of trains also run from Watford and runs to East Croydon, Gatwick and Brighton.

2.28 Harrow town centre can be accessed by car via several main roads. The most important of these are the A404 (Pinner Road), the A312 (Bessborough Road) and the A409 (Station Road).

Parking

2.29 Harrow town centre has 10 public car parks. All have been assessed for their quality. We used a proforma to assess each car park individually. A copy of the proforma and a complete table of results are included in Appendix 2.

2.30 A main strength of the car parks surveyed were the availability of disabled parking. All of the car parks had allocated spaces for disabled users. The general cleanliness was also a strength, with 5 of these car parks scoring 'good' to 'excellent' for cleanliness. Signage to the car parks has very recently been improved however, some of the car parks on the outer edges of the centre were poorly lit, which would create security concerns if these car parks were used in the evening. From the survey, the car park with the highest score is the St. Georges car park, which is privately run and located within St. Georges Shopping Centre. It is multi-storey and provides 643 car park spaces. As shown in Appendix 2, this car park scored 'good' in all aspects surveyed.

2.31 Overall, the quality of car parks in Harrow town centre is good. The common strength of all these car parks is they generally have very good pedestrian access facilities, with many having separate entrances and exits, with good visibility. The common weakness is poor signage for cars, where the road markings on the road have faded or the exits and entrances of the car parks are not clearly marked from main roads.

Customer Views and Behaviour

2.32 In accordance with the project brief, we designed and commissioned an on-street interview survey of shoppers and other town centre users. This was based on a random sample of 402 interviews, at locations outside the St George's Shopping Centre, outside the St Ann's Shopping Centre, at the junction of St Ann's Road and Havelock Place, at the junction of St Ann's Road and Station Road and on Station Road. Interviewing was conducted in August 2005 on a consecutive Thursday, Friday and Saturday and Tuesday between 9.00am and 6.00 pm. The questionnaire was designed by Donaldsons following consultation with Harrow Council. 143 interviews were conducted on Thursday, 124 on Friday, 125 on Saturday and 10 on Tuesday[2]. Details of the survey conducted as well as a breakdown of results are included in Appendix 3 of this report.

Purpose of Visit to Harrow Town Centre

2.33 Respondents were asked what was the main purpose of their visit to Harrow town centre on the day of the interview. 43% of respondents were in the town centre for non-food shopping. 16% of respondents were in Harrow for food shopping. 10% of respondents work in or near the town centre. 7% of respondents were there for business purposes and 6% were in the town centre to use the financial services. Other reasons stated included meeting friends and family, using other services, living in or near the town centre and visiting the gym.

2.34 Question 3 identifies the secondary purpose of respondents for visiting the town centre. 22% of respondents stated that their secondary reason for visiting the town centre was non-food shopping. 13% stated that they were visiting a restaurant, café or public house. 13% of respondents stated that they were there to use financial services. Other secondary reasons included that they live or work in or near the town centre, they were meeting friends and that they were visiting for social or leisure reasons.

Reasons for Choice of Harrow for Shopping or Services

2.35 Question 4 asked respondents why they had chosen to come to Harrow town centre on that day for shopping and services. The most popular reason, quoted by 45% of respondents, was the easy and good car parking available. 20% of respondents chose Harrow because it was close to work. 8% stated that they liked the good range of non-food shops. 5% of respondents stated that it was close to friends and relatives. Other reasons stated include that Harrow town centre is easy to get to by public transport, easy to get to by car, to visit St Ann's shopping centre, and because Harrow is an attractive place to visit.

Goods Purchased

[2] The survey company did not reach it full quota of interviews on the Saturday due to a 'bomb scare' in the town centre, therefore had to finish interviewing on the Sunday.

2.36 Question 5 asked what respondents had bought or expected to buy in Harrow town centre on that day (respondents could give more than one answer). From the responses given, clothes and shoes accounted for 40%; food and groceries for 38%; chemists' and medical goods, cosmetics and beauty products 16%; confectionery/tobacco/newspapers and magazines 14%; leisure and luxury goods 14%; hardware DIY goods and decorating supplies 5%; tools and garden products 5%; audio visual equipment 5%; household textiles and soft furnishings 4%; household appliances 2% and furniture; carpets and other floor coverings 1%.

Frequency of Visit to Harrow Town Centre

2.37 Question 6 asked how often respondents visit Harrow town centre for food shopping, non-food shopping, financial or personal services, leisure facilities and visiting pubs, cafés and restaurants. Of those who did visit Harrow for food shopping, 21% of all respondents indicated they came to Harrow at least once a week. 20% of all respondents came more frequently, either every day or 2 to 3 times a week. A further 13% came less regularly, either once a fortnight or once a month; with the remaining 45% coming less often or never to undertake food shopping in the centre.

2.38 In terms of other attractions, using once a week or more often as the cut off, 29% of all respondents visited at least once a week for non-food shopping, whilst 30% visited at least once a week for financial or personal services. Significantly less people visited regularly for entertainment purposes; with only 9% of respondents indicating they visited Harrow town centre at least once a week for leisure facilities, whilst 13% of respondents visited pubs/cafés and restaurants in the centre at least once a week.

Things Liked About Harrow Town Centre for Shopping or Services

2.39 Respondents were asked (Question 7) what they liked about Harrow town centre for shopping or services (respondents could give more than one answer). 38% of respondents liked Harrow town centre because it is good for non-food shops. 30% of respondents stated that they liked the centre because it is close to home, 21% liked that the centre is easy to navigate and 20% liked that is good for food shops.

2.40 Other aspects liked about the town centre included that Harrow provides an attractive environment (14%), easy access from work (12%), and that there are clean streets (10%). Overall these results show a very encouraging perception of Harrow town centre. None of the respondents stated that they didn't like anything about the town centre.

Things Disliked About Harrow Town Centre for Shopping or Services

2.41 The same positive comments came across when respondents were asked in question 8 about what they disliked about Harrow town centre. 43% of respondents stated that there was little or nothing about Harrow that they disliked. The dislikes which were mentioned included that 11% of respondents stated there was a poor range of food shops. 10% of respondents stated that they don't feel safe, 10% stated that car parking was too expensive and 9% disliked the fact that the streets were dirty. Taken together with the responses to question 7, these survey results show a strong positive balance of perceptions in favour of the town centre.

Suggested Improvements that could be made to Harrow Town Centre

2.42 Question 9 addressed potential improvements to the centre. 37% of respondents could think of nothing which could improve the town centre. Due to the openness of the question, response percentages are small, however there are a number of notable groupings, 15% suggested an increased and/or better range of shops, 11% of respondents suggested a better range of cafes, restaurants or public houses. 9% of respondents suggested cleaner streets and 9% stated that lower parking charges would be an improvement, reflecting the dislikes previously expressed. 7% requested later shopping hours.

2.43 If the suggested improvements were made to Harrow town centre, 60% of respondents believed they would visit it more often.

Ratings for Various Aspects of the Town Centre in the Day time

2.44 The scores for the tables below are worked out from the on-street interview survey. Each respondent was asked to rank each aspect of the town centre. The ranking ranged from ‘very poor’ (1) to ‘very good’ (5). The results from all respondents were then combined to give the average scores.

Topic	Average Score
Car parking	3.3
Public transport	4.1
Taxi Service	3.7
Safety and Security	3.4
Range of Shops	3.7
Quality of Shops	3.6
The Market	3.0
Range of services	3.8
Cleanliness of the streets	3.4
Attractiveness of the town centre	3.4

Source: Donaldsons, 2005

2.45 Daytime ratings for Harrow are fairly high, with most aspects scoring an ‘average’ (3) to ‘good’ (4) rating. Public transport is a particular strength and the Market is a particular weakness in the overall picture of the town centre.

Use of the Town Centre in the Evening

2.46 The survey was undertaken by interviewing town centre users during the day. As such, it was a survey with a strong daytime bias. It did not interview people who only go to the town centre in the evening, so does not provide the complete picture of the evening economy. However, daytime users of the centre were asked about their use of the town centre in the evening.

2.47 In terms of frequency of visit, 60% of all (daytime) respondents said that they never visit Harrow town centre during the evening. This indicates that the majority of people who shop in Harrow during the day do not want to visit Harrow town centre in the evening. 17% of all respondents indicated that they visited the centre in the evening at least once a week. A further 24% visited the centre in the evening, but less often.

2.48 Those 163 respondents who did visit the centre in the evening were asked their main reasons for doing so. Visiting the cinema was mentioned by 56% of these respondents, cafés and restaurants by 42%, pubs and bars by 37% and nightclubs by 9%. A further 7% indicated they visited the centre to visit the health and fitness centre; and 3% live in Harrow town centre. Other reasons mentioned included visiting bingo, going late night shopping and visiting the library.

2.49 The same group of 163 respondents was asked what they liked about the town centre in the evening (Question 14). Of those respondents, 31% stated that there were good cafes, restaurants and bars. However, 28% indicated they liked nothing or very little about the town centre in the evening. Further positive comments included that 17% stated there were good leisure, cultural and entertainment facilities; 16% stated that they liked the fact that Harrow was easy to get to by public transport; and 12% stated that it was easy to get to by car. Other likes included that Harrow is an attractive place and it has good security.

2.50 The same respondents were also asked what they disliked about the town centre in the evening. 28% of these respondents stated that they disliked nothing or very little; which is the same amount as those who stated they liked nothing or very little. 27% of respondents stated that it feels unsafe, 26% disliked the drinking culture and 25% stated that there were too many young people on the streets. 16% stated that there were poor leisure facilities and 15% stated that there were poor cafes, restaurants and bars. Other dislikes included the amount of vandalism, poor street lighting, lack of late night shopping and graffiti.

2.51 The scores for the tables below are worked out from the on-street interview survey. Each respondent was asked to rank each aspect of the town centre. The ranking ranged from 'very poor' (1) to 'very good' (5). The results from all respondents were then combined to give the average scores.

Table 3.9: Evening ratings for Harrow Town Centre

Topic	Average Score
Car parking	3.7
Bus services	3.9
Train services	3.9
Safety and security	2.9
Range of evening attractions	2.9
Quality of evening attractions	3.0
Cleanliness of Streets	3.3
Attractiveness of the town centre	3.2

Source: Donaldsons, 2005

2.52 The overall score of the evening ratings is slightly lower than in the daytime, which is to be expected as this survey had a strong daytime bias. The main strengths of the centre in the evening are its bus and train services. The main weaknesses are its perceived safety and security and range of attractions.

Profile of Respondents

2.53 In terms of employment 17.7% lived in households in which there were 1 or more people in part-time employment; and 76.9% in households with 1 or more people in full-time employment. When questioned on car ownership, 38% of respondents owned one car, 22% of respondents owned two cars and only 29% of respondents didn't own any.

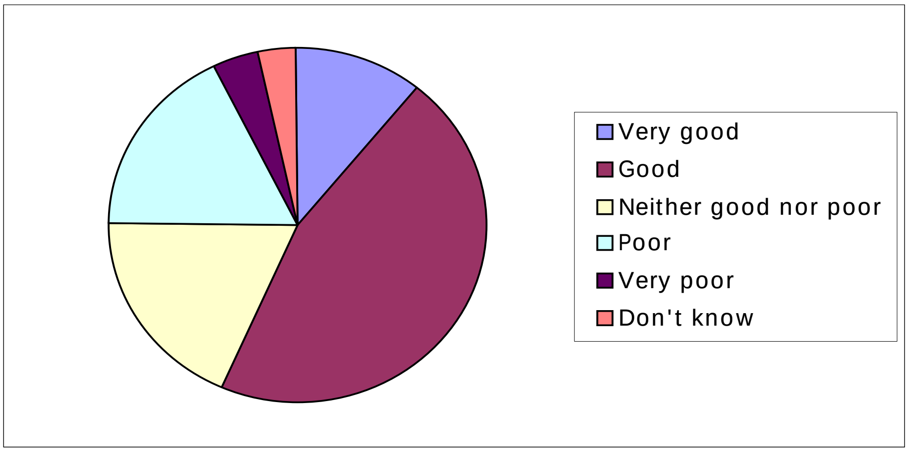
2.54 Of the 402 respondents 54% of these were White British. 13% of respondents were Indian, 9% were Other white background and 8% were White Irish. Other nationalities represented included Black African, Other Asian and Polish. The ethnic balance of this sample differs slightly from that of the borough as a whole; in particular it somewhat under-represents the Indian population and slightly over-represents the white British population. However Harrow's town centre catchment area extends beyond the borough boundary, which may account for these differences.

Crime and Security

2.55 As indicated in PPS6, the perception of safety and occurrence of crime are useful indicators for assessing the health of town centres. Our assessment of the state of the environment in Harrow town centre revealed that from the aspect of personal security and police presence all areas scored a 'fair-good' score. The northern part of Station Road does not rate quite so highly, however it is in a more peripheral area.

2.56 From the on-street shopper survey, Graph 2.2 illustrates the perceptions of people interviewed regarding safety and security in Harrow town centre during the day:

Graph 2.2: Perceptions of Safety and Security during the Day

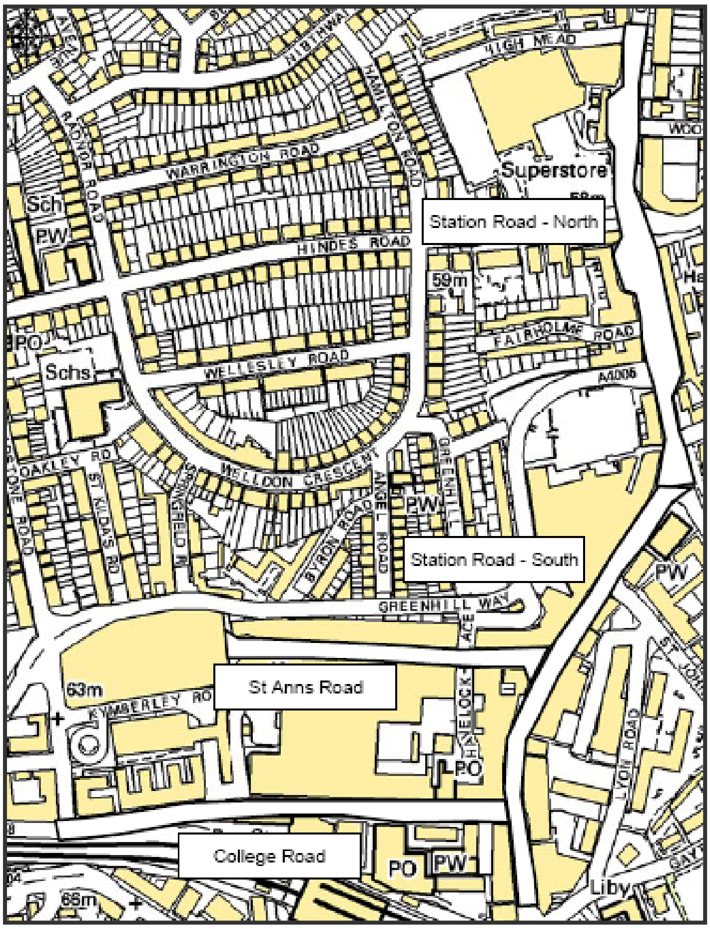


Source: On- Street Shopper Survey, Donaldsons, 2005

2.57 57% of people interviewed thought that security in Harrow was ‘good’ or ‘very good’. Only 22% stated that it was ‘poor’ or ‘very poor’. In the evening this proportion falls slightly with 39% of those responding to this question describing security as ‘good’ or ‘very good’, but 39% describing security in the evening as being ‘poor’ or ‘very poor’. This is a significant increase in users who rate security as poor in the evening (although such differences in safety and security ratings for town centres between the daytime and evening are commonly shown by surveys of this type).

Environmental Quality

2.58 In order to assess the state of the environment, we undertook a survey of the three main shopping areas of the town centre, College Road, Station Road and St Ann’s Road. For the purposes of this survey, Station Road has been split into Station Road North, which includes the section between the Sheepcote Road junction to High Mead; and Station Road South, which includes the street south of the Sheepcote Road junction. As indicated on the following map:



Source: Promap, 2006

<u>College Road</u>

2.59 The biggest weakness of this road was the condition of the carriageway and pedestrian surfaces. At the time of visiting, there were major works progressing along the pavements on both sides of the road creating temporary obstructions. Other than this the environment was 'fair-good'. The seats provided need to be repainted and there was no public art, however it would be difficult to provide it due to the narrow width of the pavements in some areas. Cycle parking provision was very good, however at the time of the survey it wasn't being used. Some of the shop fronts were boarded up which gave a desolate impression of the street.

Station Road - north

2.60 This section of Station Road is a secondary shopping area. Overall the environmental quality was poor. The carriageway and pavement showed signs of cracking. There was no public art or hanging baskets in this area: the addition of these would brighten the street up. There were low levels of graffiti and no vandalism was evident. There were some pedestrian crossings, however additional crossing points would be beneficial to increase integration between both sides of the street. Many of the shopfronts needed maintenance with their external appearance needing to be improved.

Station Road - south

2.61 The environmental quality is greatly improved within this section of the street. The main weakness is the condition of the shopfronts, which like the other streets surveyed need maintaining and brightening. It is clear that the Council has made considerable improvements to this area, narrowing the carriageway to slow traffic and be more pedestrian friendly. There is also a well used area of seating outside Lloyds TSB which provides a good quality, pleasant resting place for shoppers. Street furniture needed repainting but otherwise is in good condition.

St Ann's Road

2.62 Overall this pedestrianised street presented a pleasant environment to shoppers. There were some examples of public art such as the sculpture 'Katie', outside Natwest at the eastern end of the street. There was also adequate street furniture in fair condition. Public facilities were good, especially the amount of telephone boxes provided. The planters were also well cared for and served to brighten up the area outside the entrance to the St Ann's Shopping centre. A number of mature trees lined this street, which soften its appearance. Personal security was very good with substantial CCTV coverage. There were no dark corners and the street felt safe. The level of wheelchair access was also a strength of St Ann's Road. Again the shopfronts need to be brightened; as the poor maintenance of some of the shopfronts lets down, what is otherwise a very pleasant shopping street.

2.63 Table 2.11 summarises the assessment of Harrow town centre environment. Nine environmental features were assessed on each street in the main area of the centre; and these features were rated on a scale of one to five, where one is 'very poor' and five is 'very good'.

On this basis, three represents a neutral score. The average scores for each aspect of the centre reviewed were as follows: -

Table 2.11: Environmental Quality Survey Results

Topic	Average Score
Condition of carriageway and pedestrian surface	3.3
Provision and condition of street furniture	3.5
Provision and condition of public facilities	3.5
Level of graffiti, fly-posting and vandalism	3.5
Barriers to movement	3.5
Condition, placement and amount of cycle parking	3.0
Maintenance of buildings, shopfronts, canopies	2.5
Personal security and police presence	3.8
Wheelchair access	3.8
Average Overall Score	**3.4**

Source: Donaldsons 2005

2.64 Table 2.11 indicates the overall picture of the environment throughout the central area of Harrow town centre. The average score for the centre as a whole is 3.4, which is fair-good. The main weaknesses are the maintenance of buildings, shopfronts and canopies, and the condition, placement and amount of cycle parking. The Council has made an effort to improve the maintenance of the town centre in recent years; there is still room for improvement particularly with the repainting of street furniture. Main strengths include the amount of personal security. There were high levels of CCTV coverage on all of the main shopping streets, as well as some police presence. Wheelchair access was also good with all crossing points having dropped Kerbs. Generally, most of the pavements were wide, allowing ease of movement. A more detailed results table for each area and a copy of the environmental quality survey proforma can be found at Appendix 4.

Summary

2.65 Harrow town centre has a slightly greater representation of comparison goods shops and a slightly lesser representation of convenience goods shops than the national average. The representation of services is also somewhat above the national average. The centre has a higher than average number of multiple retailers and fairly high number of ‘top twenty’ retailers. The main foodstore within the centre is a Tesco superstore at its northern edge.

2.66 Harrow town centre has a very low number of vacant shops, which are scattered throughout the centre. Prime retail rents have grown steadily over the past eight years. Shop property investment yields have remained fairly steady at between 6 and 6.25%. Positively, the level of retailers wishing to move into Harrow as a whole is healthy, with a mix of DIY stores, clothing retailers, electrical goods stores and A3 operators, illustrating that Harrow is seen as an attractive location by retailers and café/restaurant/bar operators.

2.67 Harrow town centre is very accessible by a choice of means of transport especially by public transport and by car. The on-street shopper survey indicated that 45% of respondents came to Harrow because it was convenient and accessible. A further 20% of respondents shopped in Harrow because it was close to work. This indicates that people shopped in Harrow primarily due to convenience factors, rather than because Harrow is an attractive place to visit.

2.68 The overall state of the town centre environment is fair, with St Ann's Road having a particularly pleasant shopping environment. From the on-street survey, positive aspects mentioned included the perceived good range of shops, and that there are clean streets. The main weaknesses include people feeling unsafe and car parking charges being too high. Our visits to the centre have shown that the environment would be improved through better maintenance of some buildings and shop fronts, and a higher standard of maintenance of street furniture.

2.69 Overall, we conclude that Harrow is trading reasonably well as a vital and viable town centre. The spilt between retail and service units indicates that the centre is important as a services centre as well as a shopping centre. The town centre also has a high level of office space adjacent to it, resulting in many people using Harrow town centre for convenience reasons. It is important that town centre management strategies seek to continue to improve safety and security issues, which may arise from a stronger evening economy. Further, the town centre would be significantly improved if planned maintenance programmes were to be followed by the Council to repaint street furniture; and by the private sector to improve general building maintenance and that of shopfronts and canopies.

3 Retailer Demand

Retailer Demand – Harrow Town Centre

3.1 Retailer demand for convenience goods was assessed by contacting the main food store operators, outlining the nature of the study and seeking details from them as to their requirements and aspirations for the Harrow area. In total we had three responses from foodstore operators. For reasons of commercial confidentiality, we have not included each operator's specific requirements within this report. We therefore provide below an overview of our discussions. Those retailers that we were able to speak to included Asda, Tesco and Morrisons.

3.2 Of these retailers, one store expressed that they have a requirement for a new foodstore across the Borough, so would be interested in sites outside Harrow town centre at locations such as Pinner, Wealdstone and South Harrow. They would prefer a 6,500 sq m gross store with car parking. They would also consider a variety of layouts including mixed-use and multi level. A second store indicated that they have a requirement for a 4,600 sq m (net) scheme plus car parking and would also be interested in increasing the floorspace within their existing stores. Finally, a further retailer does not have a specific requirement within the Borough, but would be interested in any sites which come forward which fit their site criteria of 2.5 hectares, to accommodate a store of 7,900 sq m (gross) plus car parking

3.3 From the Focus database two discount food retailers have also expressed a requirement for stores within Harrow town centre. Aldi expressed a desire for a site which would suit a store of 1,400 sq m gross. Farmfoods has a requirement for a more modest store of between 450 sq m and 750 sq m gross.

3.4 Table 3.1 summarises the requirements registered with Focus by these and other convenience goods retailers. A full list of retailer requirements can be found in Appendix 5.

Table 3.1: Convenience Goods Requirements – Harrow Town Centre

Name	Minimum Size sq m	Maximum Size sq m	Date
Julian Graves Ltd	37	93	28/04/2005
Laithwaites	186	465	01/08/2005
Majestic Wine Warehouses Ltd	186	465	20/05/2005
Morris Pasties Ltd	28	70	11/08/2005
Whittard Of Chelsea Plc	47	74	11/04/2005
Aldi Stores Ltd	1,358	1,358	04/07/2005
Farmfoods Ltd	465	744	06/05/2005
Hotel Chocolat Ltd	79	121	08/06/2005
Total	**2,386**	**3,389**	

Source: Focus 2005

3.5 Table 3.1 shows a combined floorspace of between 2,460 sq m and 3,501 sq m is needed within Harrow to accommodate these convenience goods retailers.

3.6 Table 3.2 summarises retailers' requirements for comparison goods floorspace within Harrow town centre, broken down by sector:

Table 3.2: Comparison Goods Requirements – Harrow Town Centre

Type	No. of Requirements	Minimum sq m	Maximum sq m
Clothes/footwear	22	7,003	11,439
Hardware & DIY supplies	5	990	1,958
Jewellery, watches & clocks	3	586	651
Furniture, floor coverings & housing textiles	7	1,832	3,116
Recreational and other misc.	10	1,488	2,776
TOTAL	**47**	**11,899**	**19,939**

Source: Focus 2005

3.7 Table 3.2 illustrates that a wide range of retailers wish to locate to Harrow town centre. There is a very healthy level of demand from comparison goods retailers. The highest level of demand originates from clothes and footwear retailers, which is to be expected from the nature of Harrow town centre. There is also a substantial amount of demand from recreational comparison goods retailers, such as electronics shops, health and beauty shops and toy shops. The amount of space required by comparison goods retailers is a minimum of 11,899 sq m and a maximum of 19,939 sq m.

3.8 As well as convenience goods and comparison goods retailers wanting to locate within Harrow, a high proportion of A3/A4/A5 services have requirements for floorspace. 19 A3/A4/A5 businesses require space within Harrow town centre, which equates to a need for between 3,199 sq m and 5,506 sq m of floorspace.

3.9 'Other services' requiring space include fitness centres, dry cleaners, hotels and bookmakers. In total these require between 16,256 sq m and 23,301 sq m of space. However approximately 15,500 sq m of this 'other services' space comes from three requirements, namely Virgin Active, Esporta and Travel Inn, which would probably require new buildings. The remaining 'other service' requirements (approximately 2,500 sq m to 5,500 sq m) are more modest and are likely to fit in to existing buildings within the town centre. The level of floorspace required by comparison goods retailers far exceeds that of service providers which is a sign of a healthy town centre.

3.10 This type of demand from service providers is important to maintaining a diversity of uses within the town centre. However, it is unlikely that all of the foregoing requirements could be accommodated in or on the edge of the town centre. Choices between the alternatives will probably have to be made when considering the best use of potential sites, and when applying the sequential approach to site selection required by PPS6.

Conclusions on Retailer Demand

3.11 A number of conclusions can be drawn from this overview of retailers' and services' requirements within Harrow town centre. Two foodstore operators would be interested in expanding their retail offer within the Borough and a further operator, although not having a specific requirement, would be interested if a suitable site was found. Requirements from food retailers include new superstores and discount supermarkets, wanting to move into the centres or elsewhere in the Borough. There are retailer requirements for premises across all sectors of comparison goods. Clothing retailers have the highest number of non-food requirements and require the most floorspace. The level of demand for space in Harrow is very healthy, as is the diversity of businesses wanting to locate in the town centre.

4 Quantitative Need for Retail Development

4.1 In this section, we examine the current retail performance of Harrow town centre, and out-of-centre main food stores within the Borough. We have also assessed the quantitative expenditure capacity available to support further floorspace within the Borough. This study therefore includes the preparation of up to date forecasts of the capacity for additional retail floorspace in the Borough, which will be supportable by increases in the population and expenditure of catchment area residents and visitors. In this section, we describe our RECAP forecasting Model, and set out our forecasts of the additional retail floorspace which will be supportable by growth in available expenditure in the period up to 2016.

The Donaldsons RECAP Model

4.2 There are a number of possible approaches to forecasting the amount of additional shop floorspace supportable in any town, and the retail impact of proposed retail development. Some use driving time isochrones to define catchment areas, whilst others use some form of gravity model of retail attraction; or a crude assessment of overall market share of available expenditure, which is considered appropriate for the proposed retail development. All need an assessment of existing shopping facilities in the area, and the amount of expenditure available in the catchment area.

4.3 The effectiveness of the various forecasting methods varies considerably. Conventional gravity models base the extent of the trade draw of different centres on their size, and on theoretical measures of attractiveness and accessibility. In reality, other important factors, including the type and quality of retailers, shoppers' perceptions, the level of parking provision, and the retail environment, can also influence the trading pattern. Forecasts based on driving time isochrones to determine catchment areas rely heavily on assumptions and judgement rather than measures of the actual pattern of shopping visits from residential areas to shopping centres, foodstores and retail warehouses. Overall market share based methods are inherently unreliable because they rely on estimates derived from one location being applied to another with different catchment area characteristics; and because the result depends substantially on the assumptions about the extent of the catchment area in each location.

4.4 To overcome these and other problems of such approaches, Donaldsons has developed its new RECAP retail capacity forecasting Model. The main difference between our approach and conventional gravity models is that the RECAP Model uses the results of a specially designed household interview survey to identify the actual shopping patterns in the catchment area. By this means, it is possible to model realistically existing flows of catchment area expenditure to town centres, foodstores and retail warehouses; as the basis for predicting the existing and future capacity for further retail development.

4.5 In summary, the RECAP Model uses the results of the household interview survey as its objective measured 'baseline', using a conventional and widely accepted step by step approach, to complete the following tasks:-

- Calculate the total amount of convenience and comparison goods expenditure which is available within the nine zones comprising the catchment area;

- Allocate the available expenditure to Harrow town centre and non-town centre main food stores, based on the results of the household interview survey of shopping patterns; so as to obtain estimates of current sales and forecast future sales in each;

- Compare the estimated sales in the town centre and non-town centre food stores with existing floorspace (and in the case of main food stores, with sales based on estimated company average performance); so as to assess the current trading performance of each shopping destination, and the capacity to support further growth in floorspace;

4.6 The RECAP Model is a very useful tool for retail planning, which avoids the potential inaccuracies arising from assumptions about existing trade draw patterns and market shares which are often inherent in other forecasting methods. It is based on forecasting methods which have been used and refined in a large number of retail studies on behalf of public sector clients. In particular, forecasts made using the method on which the RECAP Model is based have been accepted by Planning Inspectors and the Secretary of State at many Public Inquiries. The Model has been used to prepare the expenditure and retail capacity forecasts set out in this report.

4.7 Notwithstanding the foregoing, there are particular difficulties in undertaking retail capacity forecasting in London, including the following:

- The substantial numbers of secondary shops along main roads connecting the defined centres; the large number of district and local centres; and the lack of data on the shop floorspace in these extensive secondary shopping areas.

- In some cases, coalescence between defined centres and linear secondary shopping, making it difficult to interpret the answers from respondents to a household interview survey of shopping patterns.

- Easy access to the extensive general and specialist shopping areas in Central London, (and in the case of Harrow residents, to Brent Cross and to Watford town centre). This results in substantial leakage of expenditure from the study area. It also means that shopping patterns indicated by a household interview survey do not always accurately represent actual expenditure flows for comparison goods shopping; since suburban centres such as Harrow town centre are more frequently visited, but greater expenditure often takes place on occasional shopping trips to Central London, for example.

4.8 No forecasting method can provide precise and fully reliable quantitative retail capacity forecasts in the London suburbs. In these circumstances, which apply to some degree in Harrow, retail capacity forecasting can only be undertaken in broad terms as a means of exploring relationships between population change, expenditure growth, and existing retail floorspace provision. It is therefore important to remember that the RECAP Model is an exploratory tool, rather than a prescriptive mechanism. Thus, for example, in preparing forecasts for future shop floorspace capacity, the Model is usually run iteratively to explore the changes in the forecasting variables, such as in the pattern of attraction of expenditure or in sales densities, which would be necessary to support different levels of new development. Use of the Model in this way illuminates sensitivities in variables, and assists in making judgements about the realism of any given growth or impact scenario. The forecasts prepared using the Model are therefore not intended to be either growth targets or rigid limits to future growth.

4.9 When using the RECAP Model capacity forecasts as a guide to future planning policy, it is also important to remember that the further ahead the forecasting date, the less certain the forecast. Thus the forecasts for 2011 are more robust than those for 2016. In particular for these later dates, we suggest that forecasts such as these should be treated with some caution, since they only indicate the broad order of magnitude of retail capacity at those dates, if all of the forecast trends occur. For this reason we recommend that the forecasts should be reviewed and revised by not later than about 2011 in the light of events, taking account of the effects of any development which has occurred in the meantime; for example, the proposed Charter Place redevelopment in Watford town centre, and the proposed extension of the Brent Cross Centre. Furthermore, the long term growth in the use of internet shopping is as yet unknown (although it has to some degree been taken into account in this report), and reinforces the need to revise the forecasts of retail floorspace capacity well in advance of 2016.

4.10 The detailed RECAP Model tables are set out in Appendix 7, and this section should be read in conjunction with that Appendix.

Principal Data Inputs

Catchment Area and Household Interview Survey

4.11 The catchment area for the purposes of the retail capacity forecasts was defined by reference to postcode districts and sectors, taking account of the location of Harrow town centre, the location of the principal competing centres, the principal road pattern and rail networks, and significant topographical features. This catchment area was divided into 9 zones for the purposes of the household interview survey and subsequent forecasting. Within this area we designed and commissioned a detailed household interview survey of shopping patterns. The questionnaire and relevant results of this survey are included in Appendix 6. Interviewing and data processing was undertaken for us by Next Steps Market Research Ltd. Interviewing took place in May 2005. A random sample of 1,000 households was interviewed by telephone, of which 150 were in Catchment Zone 5 where Harrow town centre is located. The other interviews were spread between the remaining zones, approximately in proportion to the population of each zone, but with adjustments to ensure that there were not less than 80 interviews in any one zone.

4.12 As with the on-street survey, the household interview survey slightly over represents the White British population and under represents the Indian population, when compared with the Borough as a whole in 2001. However, the survey area extends significantly beyond the Borough boundary and includes other areas of different ethnicity. We therefore consider that the ethnic profile of the sample is a reasonable match to that of the catchment area as a whole.

4.13 The results of the survey provide a detailed picture of where the residents of the Harrow catchment area shop for main food and top up convenience goods shopping, and for eight different categories of comparison goods shopping. They also provide some information on linked trips shopping where the primary trip generator is main food shopping; and on travel mode.

Catchment Population

4.14 Population forecasts were obtained from MapInfo as a 'Harrow Area Profile Report', setting out the 2001 population of each of the nine catchment zones, together with trend based forecast populations for 2006, 2011 and 2016. To obtain the estimate for the base year of 2005, we interpolated between the 2001 and 2006 figures. The resulting catchment area population forecasts by zone are set out in RECAP Model Table 1 in Appendix 7. They show the population of the catchment area as a whole increasing from 377,887 in 2005 to 407,834 by 2016. This is an increase of 7.9% over the period 2005 to 2016, or about 0.7% per annum.

Forecasting Dates

4.15 We have prepared base year estimates of retail sales as at 2005, as this was the year in which the household interview survey was undertaken. Our forecasts have been prepared for the years 2006, 2011 and 2016. This latter date has been chosen because it is the 'target' end date for the new Local Development Framework. As indicated above, the longer ahead of these forecasts i.e 2016 should be treated as a broad guide only, and reviewed and updated well before that date.

Price Basis

4.16 All monetary values in this report are in 2001 prices, unless otherwise indicated.

Per Capita Expenditure

4.17 We obtained from MapInfo average per capita expenditure on convenience and comparison goods in the catchment area in 2001. After deducting expenditure on special forms of trading, these amount to just over £1,860 for convenience goods and £2,936 for comparison goods. These base figures are set out in RECAP Model Table 2 in Appendix 7. Table 2 indicates the breakdown of the comparison goods figure into the eight different categories of comparison goods expenditure covered by Questions 6 to 13 in the Household Interview Survey 2005.

4.18 The base figures for the year 2001 in Table 2 have been increased to allow for actual and expected growth over the forecasting period to 2016. For convenience goods, we have applied the actual growth 2001 to 2004 indicated in MapInfo Brief 05/02, followed by the MapInfo 'best fit' trend rate of 0.80% per annum, for the period 2004 to 2016. For comparison goods, we have applied the actual growth 2001 to 2004 (30.24% for this 3 year period), followed by the ultra long term trend rate of 3.8% per annum for the period 2004 to 2016. Reflecting the recent dowturn in the rate of growth of comparison goods expenditure, this is slightly below the econometric forecast of 4.3% per annum by Oxford Economic Forecasting set out in MapInfo Brief 05/2, but significantly below the long term and medium trend rates of growth of 4.8% pa and 5.5% pa respectively.

4.19 We consider that the ultra-long term trend based growth rate of 3.8% pa realistically takes account of the current downturn in growth of retail expenditure, and the medium term economic outlook. It is significantly below the historically very high rates of growth of the last few years, which are exceptional in relation to the trend. It would be unrealistic to assume that the recent high level of growth will continue annually throughout the 11 year forecasting period. The ultra long term trend spans the period 1964 to 2004, thus covering several economic cycles.

4.20 Of course, the ultra long term trend does not take full account of the potential growth in on line shopping via the internet or interactive digital TV. Whilst this is currently growing rapidly, it still accounts for only a very small proportion of total retail spending (2.4% in 2004, according to Verdict Research); and is focused mainly on particular retail categories eg. electrical goods, music and video, homewares, and books. Verdict forecasts that on-line sales will grow to 6.0% of all retail sales by 2009, but that some of this growth will be at the expense of traditional special forms of trading, in particular mail order. Verdict also forecasts that the rate of growth in on-line sales will level off as access to the internet reaches practical saturation. To adopt an annualised average rate of growth in per capita expenditure on comparison goods of 3.8% per annum over the entire forecasting period, when growth for the previous few years has been significantly above this level, therefore makes an implicit allowance for further growth in such non traditional forms of shopping. In any event, periodic review of the forecasts will enable the assumed growth rates to be adjusted as necessary in the light of actual growth in both overall per capita expenditure and the proportion of it taken by on-line shopping, and the forecasts revised accordingly.

4.21 The combined effect of the forecast growth in population and in per capita expenditure is that we expect total catchment expenditure on convenience goods (set out in Table 3 in Appendix 7) to increase by about £131.4m (17.8%) over the period 2005 to 2016; and total catchment area expenditure on comparison goods to increase by about £940.0m (62.7%) over the same period. This compares with growth in total catchment area population of 7.9% over the period. Thus just under half of the growth in catchment area expenditure on convenience goods is due to expected growth in population; but only a small proportion of the growth in catchment area expenditure on comparison goods is accounted for by forecast growth in population. This means that the comparison goods floorspace capacity forecasts are very insensitive to the population growth assumptions, and much more sensitive to the assumptions about growth in per capita expenditure, particularly in the later part of the forecasting period.

Shopping Patterns in the Catchment Area

4.22 As indicated above, in 2005 we designed and commissioned a new household interview survey of shopping patterns in the Harrow catchment area. We have included the unweighted tables of results in Appendix 6. (Because they are unweighted, the 'Totals' columns in those tables are not statiscally representative of the catchment area as a whole; however the results for each zone are representative of the population of each zone within the sampling limits.) We have used the results as a key input to our RECAP Forecasting Model in Appendix 7. Thus for Harrow for example, in Table 5 we have combined the results of Question 2 about main food shopping with those of Question 5 about top up food and convenience goods shopping, to provide a weighted average market share of total convenience goods expenditure in each zone which is attracted to main foodstores and other convenience goods shops in Harrow town centre. These weighted averages are then rounded to the nearest integer and used in Table 7 to indicate the pattern of attraction of convenience goods expenditure to shops and stores in Harrow town centre.

4.23 In the case of comparison goods, for Harrow town centre, for example, we have applied the results of the household interview survey for each of the eight categories of comparison goods (Questions 6 to 13) , weighting the market shares for each according to per capita expenditure on each category (as indicated by MapInfo); to provide a weighted average market share of all comparison goods expenditure which is attracted from each zone by shops and stores in the town centre. The market shares for each individual goods category and the weighted averages are set out in Table 6 the final column (weighted average) of which is rounded to the nearest integer, and applied (with the adjustment described below) in Table 7 to indicate the market shares of all comparison goods expenditure attracted from each zone by shops in Harrow town centre.

4.24 Using the results of the household interview survey for Harrow town centre in the RECAP Model without adjustment would result in an unrealistically high comparison goods sales density for the town centre, which would be very substantially above the sales densities which we have measured in other town centres of similar size. It would also be higher than is implied by shop rental values in Harrow town centre. There is an approximate correlation between centre size and average sales density, with larger town centres generally having higher sales densities than smaller centres. This is the main reason why shop rental values are higher in larger centres than in smaller. To arrive at average sales densities for Harrow town centre which are broadly in line with those we would expect for a town centre of this size, and in line with current rental values, therefore, we have reduced the market shares indicated by the household interview survey by a factor of 50%. Thus the market shares in Table 7 in Appendix 7 are 50% of the weighted average market shares indicated by the household interview survey in Tables 5 and 6.

4.25 This adjustment factor is particularly necessary in Harrow because of the proximity of the centre to major magnet centres such as Watford, Brent Cross and the West End of London. People are likely to have a propensity to spend larger sums in these magnet centres, but visit them less frequently than they visit Harrow town centre. Whilst they answer the questions about comparison goods shopping by stating Harrow town centre as the place where they do most such shopping (because of their greater frequency of use of that centre), this substantially over-represents their expenditure in that centre.

4.26 The market share adjustment factor is also necessary because of the uneven distribution of income across the catchment area covered by the household interview survey. Within this area, much of the population has only moderate incomes, but there are substantial ‘pockets’ of significantly higher income areas. Examples include Harrow on the Hill, Pinner and Northwood. Of necessity, the RECAP Model applies the average per capita expenditure for the whole catchment area to the market shares measured by the household interview survey. However, because of the limited and lower mid market profile of most of the shops in Harrow town centre (discussed further in Section 5 below), market shares of comparison goods expenditure attracted by the town centre from the high income areas are likely to be significantly lower than from the lower income areas. Thus without a market share adjustment factor to compensate, the RECAP Model would over estimate attraction of expenditure and thus comparison goods sales in Harrow town centre. To use different per capita expenditure estimates for different parts of the catchment area would have significantly increased the costs to the Council, and the complexity of the Model. It would take it outside the broad approach recommended by PPS6. Use of the market share adjustment factor is a simpler way of taking account of the uneven distribution of income.

4.27 There are very few retail warehouses in the Borough of Harrow, and these comprise a scatter of individual stores rather than a retail park or parks. In contrast, there are a number of retail parks in the surrounding area, in particular large retail parks on the south side of Watford, on Edgware Road, at Brent Park (IKEA and other individual stores) and at Ruislip. The results of the household interview survey indicate substantial numbers of respondents saying that they do most of their shopping for some categories of comparison goods at retail parks or retail warehouses in Harrow. These responses are not compatible with the very limited number of retail warehouses (and complete lack of retail parks) in the Borough. We consider that in answering these questions about shopping habits for comparison goods, many respondents to the survey misinterpreted the location of retail parks outside Harrow as being in the Borough. Thus the results do not indicate use of retail warehouses and parks in the Borough, but retail parks in the surrounding area.

4.28 In view of the unreliability of these survey results for retail warehouses, therefore, we have not modelled sales in the small number of retail warehouses in the Borough. This study primarily relates to future retail capacity in Harrow town centre, and so the capacity for additional retail warehouses in the Borough is of limited relevance. By excluding the retail warehouses’ market shares and expenditure from the RECAP Model, the forecasts implicitly allow for growth in that sector of comparison goods expenditure. However, we comment further on the implications for planning policies later in the report.

4.29 For the non-town centre main food stores, use of the household interview survey results without adjustment results in high but not unrealistic sales densities. The adjustment factor in these cases was therefore 100% (ie no adjustment was made to the weighted average market shares indicated by the survey).

Visitor Expenditure

4.30 We have not allowed for any expenditure in the town centre, and in non-town centre main food stores, by visitors from outside the catchment area covered by the household interview survey. This is because Harrow is not a noted destination for tourists and other visitors. Whilst we would expect some such expenditure by visitors to occur, we would also expect some expenditure by catchment area residents in other locations outside the catchment area, in addition to that which is indicated by the results of the household interview survey. To a substantial degree, this additional outflowing expenditure would be likely to offset any inflowing visitor expenditure.

Existing Shop Floorspace

4.31 For main food stores in Harrow town centre, and the non-town centre main food stores in Harrow, we have used floorspace data published by the Institute of Grocery Distribution (IGD), supplemented where necessary with information from Experian Goad and Harrow Council. Details of these shops and stores in Harrow are set out in Table 10 (town centre) and 18 (non-central).

4.32 For comparison goods floorspace in Harrow, we have used the results of the most recent Experian Goad survey and information from Harrow Council. To this we have added the net comparison good sales area in the relevant main food stores. The resulting total comparison goods shop floorspace in Harrow town centre is estimated as 67,337 sq m net. This figure is included in RECAP Model Table 12, Appendix 7.

Sales Densities in Main Food Stores

4.33 For the existing main food stores in Harrow town centre and the non-town centre main food stores in Harrow, we have applied estimated company average space allocations and convenience goods sales densities based on information published by Verdict Research. These are set out in Tables 10 and 18 for Harrow town centre and non-central stores respectively.

Development Scenarios Assessed

4.34 We have assessed one scenario for development, Scenario 1 – the 'baseline' scenario, which assumes that there will be no change in the market shares of available expenditure attracted from the catchment area through the period to 2016.

4.35 There are currently no proposals for major new retail development in Harrow town centre or in out-of-centre locations in the Borough. There is therefore no immediate prospect of the market shares of catchment area expenditure attracted increasing in the first part of the forecasting period. In reality, there are prospects of Harrow town centre's market share of catchment area expenditure falling, as a result of the proposed redevelopment of Charter Place in Watford, and proposed extension of the Brent Cross centre. We therefore consider that significant new retail development in Harrow town centre will do no more than enable the town centre to retain its existing market share, in the face of this increased competition from other centres which are accessible to many of the residents of Harrow's catchment area. Scenario 1 therefore represents our current best estimate of likely future retail performance of Harrow in the study area, and we have not modelled any further scenarios involving changing market shares.

4.36 It is possible that proposals for substantial new retail development in Harrow town centre could emerge in due course. However, by their very nature, such proposals would take several years to formulate and implement. It is unlikely that such retail development would be completed until late in the forecasting period, or beyond 2016. Review of the retail capacity forecasts in connection with the preparation of any such proposals would enable a second scenario to be modelled at that time; in which the effects on the pattern of market shares of expenditure attracted by the town centre are explored, and the effects on forecast retail capacity calculated.

Format of the RECAP Model Tables

4.37 The detailed RECAP Model Tables are set out in Appendix 7. Table 1 sets out the population forecast for each of the 9 catchment zones. Table 2 indicates per capita expenditure, and growth in that expenditure. Table 3 is total catchment area expenditure by zone for convenience and comparison goods over the period 2005 to 2016. Table 4 indicates total catchment area expenditure by zone in 2005 on each of the 8 categories of comparison goods.

4.38 In Scenario 1, for Harrow town centre, Tables 5 and 6 set out the pattern of weighted average market shares of catchment area convenience and comparison goods expenditure respectively, which is attracted from the catchment area to that destination. The market shares in Table 7 are based on the detailed results by goods category obtained from the household interview survey, and set out in Tables 5 for convenience goods, and 6 for comparison goods – after application of the 50% survey adjustment factor described above. Table 8 is the product of Tables 4 and 6. It shows the attraction of expenditure on each of the 8 comparison goods categories (taking account of the 50% survey adjustment factor for comparison goods); together with the resulting overall market shares of such expenditure currently attracted by the town centre. Table 9 is the product of Table 3 (catchment area expenditure) and Table 7 (adjusted market shares). It indicates the convenience and comparison goods expenditure attracted from each catchment zone by Harrow town centre at each date. Table 10 sets out the sales potential of the existing main food stores at estimated company average levels; whilst Table 11 indicates the sales potential of committed new developments in the town centre.

4.39 Tables 12 compares the expenditure attracted by Harrow town centre and hence sales, with existing shop floorspace. The top line of Table 12 (spending by catchment area residents) is taken from the bottom line of Table 9. As appropriate, an allowance (of 1.5% pa for comparison goods) is made for the average sales density of the existing shops to increase in real terms, following the long term trend towards higher town centre sales densities.

4.40 A similar arrangement of tables applies to the non-town centre main food stores in the Borough. These are Tables 13 to 21.

The RECAP Model Forecasts

4.41 In the remainder of this section, we set out our retail capacity forecasts for Harrow town centre, and discuss the relationship between the existing centres and potential new retail developments. The forecasts are summarised in Table 4.1. We also comment on the implications for future development strategy. In setting out our forecasts, we distinguish between convenience goods and comparison goods, defined as follows:

- Convenience goods: Food, alcoholic drink, tobacco products, newspapers and periodicals, non-durable household goods.

- Comparison goods: Clothing and footwear; household textiles and soft furnishings; Furniture and floor coverings; household appliances; audio visual equipment; hardware, DIY goods, decorating supplies; chemist and medical goods, cosmetics and beauty products; books, jewellery, watches, china, glassware and kitchen utensils, recreational, personal and luxury goods.

Table 4.1

Summary of Retail Capacity Forecasts

Goods/Scenario/Location	2006 (sq m net)	2011 (sq m net)	2016 (sq m net)	RECAP Model Table (Appendix 7)
Convenience Goods				
Scenario 1:				
Harrow Town Centre	3,700	4,450	5,250	12
Harrow Non-Central	9,000	11,100	13,350	21
Comparison Goods:				
Scenario 1:				
Harrow Town Centre	550	13,400	29,100	12

Source: RECAP Model Tables in Appendix 7 as indicated, rounded to the nearest 50 sq m net.

Notes: The forecasts in Table 4.1 are cumulative, ie. The forecasts for each date include the forecasts for the previous dates and are not additional to those earlier forecasts.

For Harrow town centre, the forecasts are for new floorspace additional to current commitments (Bradstowe House development and Tesco extension).

Convenience Goods

4.42 RECAP Model Table 12 shows that in 2005, the main foodstores and other convenience goods shops in Harrow town centre were calculated to be achieving combined sales of £118.9m; at a combined average sales density of £14,417 per sq m net. Table 10 shows that based on estimated 2002/3 company average sales densities, the combined sales density of these stores in 2005 was £8,731 per sq m net. Thus, these stores as a group are calculated to be trading substantially above the level based on estimated company averages.

4.43 In Table 12, we have allowed for sales in the existing convenience goods shops in Harrow town centre as a group, to fall to the level based on estimated 2002/3 (the latest date for which such data is available) company averages. This is a conventional approach in retail studies of this type. On this basis, summary Table 4.1 above shows that there would be sufficient expenditure to support up to about 3,700 sq m net additional convenience goods floorspace by 2006, rising to about 4,450 sq m net by 2011, and further to about 5,250 sq m net by 2016 if forecast trends occur. These forecasts are on the basis that such new floorspace is provided in the form of a modern superstore trading at a 'generic' average for such stores of £12,500 per sq m net. If provided in a different format, such as a combination of a discount supermarket and a town centre format supermarket, the capacity for additional floorspace would be somewhat greater, since the former type of store achieves much lower sales densities than superstores.

4.44 In the case of non-town centre locations in Harrow, Table 21 shows that the non-town centre main food stores in the Borough as a group are estimated to be achieving combined convenience goods sales of about £329.2m, at an average sales density of about £14,603 per sq m net. This compares with the level based on estimated 2002/3 company average sales densities of about £209.7m at an average of £9,304 per sq m net (Table 18). We therefore conclude that the existing non-town centre main food stores in the Borough are trading at well above the level based on estimated company averages. This indicates capacity for substantial additional convenience goods floorspace in main food stores outside Harrow town centre.

4.45 On the conventional assumption that convenience goods sales in the existing non-town centre main food stores fall to estimated 2002/3 company average levels, Table 4.1 shows that there will be capacity for up to about 9,000 sq m net additional convenience goods floorspace in 2006, rising to about 11,100 sq m net in 2011, and further to about 13,350 sq m net by 2016, if forecast trend occur. As with the forecasts for the town centre, these forecasts are on the basis that additional floorspace is provided in the form of modern food superstores trading at a 'generic' average of £12,500 per sq m net. If provided in another format or formats, the forecast capacity would be likely to be greater.

4.46 It is important to note that the convenience goods retail capacity forecasts set out in Table 4.1 for both Harrow town centre and non-town centre locations in the Borough are theoretical maxima. This is because they are based on the assumption that sales densities in the existing main foodstores will all fall to currently estimated 2002/3 company average levels, as a result of the competition from new developments. However, an average is only an average; and the more attractive stores will continue to trade at levels well above the company average, whilst others may trade successfully below the average. In addition, company average sales densities may well rise over time as food retailers become more efficient. Further, stores trading in London are likely to need to trade at above the company average levels, because of the higher costs of operating there (for example land costs and staff costs). It would therefore not be realistic to plan on the basis that such an across the board reduction in sales densities should or would occur.

4.47 The forecasts strongly suggest that the constraint on development of new food stores is likely to be the availability of suitable sites in or on the edge of Harrow town centre and the district centres, rather than availability of sufficient expenditure to support them. Overall, we consider that there should be sufficient capacity in practice for one new full sized full range food superstore in or on the edge of Harrow town centre, or a combination of smaller food stores there; together with up to two new full sized superstores, or one such superstore and a combination of smaller units including discount supermarkets and/or extensions to existing stores in non-town centre locations (for example in or on the edge of the district centres); within the forecasting period to 2016.

4.48 In deciding how these forecast needs should be accommodated, the sequential approach should be applied as indicated in PPS6. This gives priority to town centre and edge of centre locations over out-of-centre locations. Thus some or all of the forecast capacity for additional non-town centre floorspace (which has been treated separately from the town merely for forecasting convenience) should be accommodated by means of town centre or edge-of-centre development, if a suitable site or sites exist or could be assembled. We comment further on this later in the report.

Comparison Goods

4.49 In Appendix 7, Table 12 shows that Harrow is estimated to be achieving an average sales density for comparison goods in 2005 of about £6,145 per sq m net. Based on retail studies of a large number of other town centres, we consider that this is a good sales density for a centre the size and nature of Harrow; and indicates that the town centre is trading well for its size. It reflects the fact that per capita expenditure has been growing fast in recent years, but there has been no commensurate increase in comparison goods shop floorspace in Harrow town centre.

4.50 On this basis, Table 4.1 shows that with no increase in market shares, capacity for additional comparison goods floorspace in Harrow town centre will start to arise in 2006 for approximately 550 sq m net of space. By 2011 there will be capacity for about 13,350 sq m net increasing to about 29,100 sq m net by 2016. These capacity forecasts are for new floorspace additional to the current commitments in the town centre. They strongly suggest that the Council will soon need to start preparations for a substantial new town centre retail development or developments for completion in about 5 to 10 years time, if Harrow is not to suffer a permanent loss of market share to Watford and Brent Cross, when these centres are expanded. Since major retail developments at these latter centres are likely to be completed ahead of such a scheme or schemes in Harrow town centre, we expect a fall in Harrow’s market shares of comparison goods expenditure when these competing retail developments open. However, we consider that substantial and well-designed new retail development in Harrow town centre should be capable of redressing the balance, and retaining Harrow’s position in the retail hierarchy in the long term.

District and Local Centres in Harrow

4.51 We have not modelled expenditure attracted to the district and local centres in the Borough, because although together they amount to an extensive retail offer, individually they are too small to show up adequately in the results of the household interview survey of shopping patterns. They are mainly used for day to day 'top-up' shopping, and so are not mentioned by people responding to questions about where they do most of their shopping for each category of goods. The results of the household interview survey (used in the RECAP Model) show that substantially less than 100% of the expenditure in each catchment zone is attracted to Harrow town centre and the modelled non-town centre shopping in the Borough. The remainder is attracted to shopping destinations outside the Borough, and to the district and local shopping centres in the Borough. This latter element of catchment area expenditure is, of course, also growing as a result of growth in population and expenditure. Although the expenditure attracted by the district and local centres is not included in the RECAP Model (apart from convenience goods expenditure attracted by any main food stores in these centres), therefore, the Model implicitly allows for growth in their expenditure and sales. This should enable them to continue to provide local top-up shopping facilities in the long term.

4.52 The district and local centres within Harrow itself also serve local walk-in and top-up shopping needs. Some are 'anchored' by a small supermarket or larger food store. Any such main food stores have been included in our RECAP Model forecasts.

Comparison Goods Retail Sector Analysis

Harrow Town Centre

4.53 To assist with assessing the need for additional retail floorspace in Harrow town centre, we have undertaken an analysis of the market shares of catchment area expenditure on each of the eight sub-categories of comparison goods, which the town centre is attracting from the catchment area in 2005. RECAP Model Table 4 in Appendix 7 sets out the available catchment area expenditure on each of the eight comparison goods categories. Table 6 indicates the pattern of market shares of such goods attracted from the catchment area by Harrow town centre. The product of Table 6 with Table 4 is set out in Table 8. This latter table also indicates the overall market share of expenditure on each comparison goods sub-category, which is attracted by the town centre.

4.54 Table 8 shows that for Harrow town centre, there is a clear distinction between the five 'bulky goods' categories covered by Questions 7 to 11 of the household interview survey, and the non-bulky goods categories covered by Questions 6, 12 and 13. For the former, market shares are very similar, ranging from 20% to 24%. The latter are also very similar, ranging from 30% to 32%. The distinction between the two categories of expenditure is principally the result of the extensive development of 'bulky goods' retail warehouses in the last 15 years or so, resulting in a significant reduction in the sale of such goods from town centres nationally, as well as in Harrow. This pattern is common to most town centres of similar size and type. It illustrates the impact which out-of-centre ‘bulky goods’ retail warehouses have had upon town centres.

4.55 Subject to the foregoing, the pattern of market shares shows that there are no conspicuous weaknesses in any particular sub-category of comparison goods retailing in the town centre. However the low market shares overall show that there is substantial leakage of comparison goods expenditure from the catchment area to other shopping destinations.

Use and Review of the Forecasts

4.56 Finally, we must emphasise that all expenditure based forecasts of future shop floorspace capacity are based on imperfect data and contain a number of assumptions. Our forecasts set out in this report are based on the most up to date and reliable information currently available to us. However, they are intended as an indication of the likely order of magnitude of future shop floorspace capacity (if forecast trends are realised) rather than as growth targets or rigid limits to future growth. The forecasts should be periodically revised as necessary in the light of actual population and expenditure growth, and as development proceeds and its effects become measurable.

5 Qualitative Need for Retail Development

5.1 Whilst Harrow town centre is designated in the London Plan as a Metropolitan Centre, in terms of comparison goods floorspace it ranks ninth out of the ten such centres ('London Town Centre Assessment (Stage 1) Comparison Goods Floorspace Need in London', Experian Business Strategies, June 2004). Although St Ann's Road is the prime shopping street (in terms of pedestrian flows and shop rental values), many of the shops there (particularly on the north side) are small by modern standards. Thus for example, Next currently occupies a shop in St Ann's Road which is much smaller than this company normally occupies in centres of similar strategic importance. In the town centre generally there is a lack of large modern stores; and the town centre has only one department store, Debenhams, occupying a building with a large amount of unnecessary back office space in an off-prime location.

5.2 The two purpose built modern shopping centres, St Ann's Centre and St George's Centre are not strongly 'anchored', in that they lack department stores or wide-range variety stores. The largest stores in the former are BHS (the main entrance to which is in St Ann's Road), Primark and HMV; whilst the largest stores in the latter are Boots, Woolworths and TK Maxx. The only large modern food store in the town centre, Tesco, is some way from the prime retail core, being several minutes walk to the north on Station Road.

5.3 The retail profile of the town centre is principally lower mid market, reflecting the socio-economic profile of much of the catchment area. However, this means that higher income residents of nearby areas, such as Harrow on the Hill, Pinner, Northwood and Ruislip, are not well catered for and unlikely to be attracted. The town centre almost completely lacks high quality fashion goods and homewares retailers, such as Jaeger, Austin Reed, Burberry, Hackett, Timberland, Heales and Habitat. It also has few of the new fashion brands aimed at younger shoppers, for example, Mango, Zara and Jigsaw (although H&M is in the St George's Centre); and none of the international 'designer' brands such as DKNY. There are few specialist fashion goods boutiques. Within the existing shops and stores, there are few examples of goods from up-market brands such as Paul Smith, Polo Ralph Lauren, Gant. Whilst the nature of the catchment area means that the most up-market retailers are not likely to be attracted, the town centre currently has a somewhat 'one-dimensional' retail offer, rather than a retail offer which is sufficiently comprehensive and rounded to attract a wide range of shoppers.

5.4 In terms of scale, the town centre is not large enough to compete effectively with larger centres such as Watford, or with Brent Cross, except in Harrow's core catchment area. As a result, the market shares of catchment area expenditure attracted reduce significantly with increasing distance. The town centre lacks sufficient 'critical mass' of retailing and related facilities to be able to attract a wide range of retailers, and shoppers from a wide area.

5.5 Whilst the town centre contains the two modern shopping centres, and the buildings in the prime retail area of St Ann's Road are in good condition, some other parts of the town centre comprise buildings which are run down and in need of refurbishment. Shopfronts in these secondary areas too are sometimes in need of repair or replacement. The shopping environment in the town centre is generally pleasant and in reasonably good condition. However, there are some drawbacks, such as the unkempt service areas behind the properties on the west side of Station Road (south of the junction with St Ann's Road) which are visible from St Ann's Road down Havelock Place; and the service vehicles and cars crossing the pedestrianised St Ann's Road to access service yards off Havelock Place.

5.6 In view of the foregoing, we consider that there is a significant qualitative need to expand the range of retailing in Harrow town centre to increase its ability to compete effectively with Watford, Brent Cross (both of which are formulating proposals for major retail redevelopment or expansion) and other easily accessible shopping destinations. This will involve developing larger stores and shop units, so as to attract the most popular anchor stores and other multiple retailers. There is also a need to attract higher quality retailers, to make the retail offer more rounded and comprehensive, so as to serve better the higher income parts of the catchment area. Such new retailing, if it could be appropriately accommodated, could also help to address the environmental weaknesses highlighted in Section 2 above. It would also be beneficial to develop a new high quality food store as close as possible to the retail core of the town centre, to remedy the lack of food stores in this area, thus assisting one trip to serve several purposes.

6 Potential Development Sites

6.1 As part of the brief, Harrow Borough Council requested that a commercial review of possible retail development sites within Harrow town centre be undertaken. We therefore inspected a range of sites, as shown on the map in Appendix 9. These were selected either because they are contiguous with existing retailing/services, they are undeveloped, or the existing uses are likely to become redundant within the period covered by the new LDF. In our assessment, we focused on the commercial suitability and practicality of the sites for new retail development, to meet the needs for new retail floorspace identified in the previous sections of this report; in particular, a large new food store, and large scale comparison goods retailing. However, we have not undertaken any financial appraisals, since no development schemes exist which could be appraised for financial viability; and to do so was not covered by our terms of reference for the study. The sites assessed were as follows:

1. Greenhill Way car park and Debenhams
2. St Ann's Centre Service Yard West
3. Havelock Place
4. Station Site and College Road (south side)
5. Gayton Road Library
6. Gayton Road Car Park

Greenhill Way Car Park and Debenhams

6.2 This is a large site of approximately 1.8 hectares, located between Station Road and Greenhill Way, on the north side of the town centre. The northern approximate half of the site is currently the Council owned Greenhill Way surface car park, and the southern approximate half is occupied by the Debenhams department store and offices. The eastern edge of the site is bounded by the shops fronting onto Station Road. The site is approximately level. It enjoys excellent access from Greenhill Way. The Debenhams store appears to have some underused accommodation at the rear, resulting in the building being used inefficiently. The front façade to Station Road is architecturally undistinguished. However, the west façade to Greenhill Way is attractive, and may be worthy of retention in any redevelopment. We understand that the freehold interest in the Debenhams store has recently been purchased by a property development company, which may be contemplating options for redevelopment.

6.3 There is also a small triangular site on the north side of Greenhill Way, which is currently used as a surface car park, and is owned by the Borough Council. It is land left over from construction of Greenhill Way. Being on the opposite side of the busy Greenhill Way, it cannot readily be integrated with the main site to increase the size of the latter, although it might be possible to construct a service yard (or other supporting facilities) for a new shopping centre on the site, with eg, a goods lift and bridge link over Greenhill Way into the new development.

6.4 Even excluding the site north of Greenhill Way, this is the largest single site in the town centre, when the Debenhams building is included. With this inclusion, in design terms it would probably be possible to develop a new shopping mall (open or covered), anchored by a replacement Debenhams store at the north end of the site, and including car parking over or under the development (or both), subject to financial viability. The principal entrance to such a mall would need to be as close to the southern edge of the site as possible, so as to attract shoppers around the corner from St Ann's Road. It would also need to be a prominent design for the same reason. Ideally, the site of the existing Superdrug building should be incorporated in the scheme, since this is closer to the corner of St Ann's Road (and is one of the most ugly retail buildings in the town centre). It might be necessary to widen the pavement on the west side of Station Road, between St Ann's Road and the mall entrance, to accommodate the much greater pedestrian flows which would be likely in this area.

6.5 Such a scheme would have a number of advantages. First, it would enable Debehams to occupy a new store in a highly prominent location visually, at the junction of Station Road and St Ann's Road. Continuity of trading for the company should also be possible, because the new store could be built on the existing car park, before the old store is demolished to construct the new mall. Second, the scheme could be large enough to provide additional large stores and shop units, thus increasing the 'critical mass' of retailing in Harrow, and helping the town centre to compete effectively with enlarged centre in Watford and Brent Cross. Third, as a new centre (rather than small-scale incremental growth), it could be possible to attract some of the more up-market retailers, which are currently lacking in Harrow, thus helping to make the retail offer of the town centre more comprehensive.

6.6 The site does have some disadvantages, however, for new prime retail development. The most important of these is that it is not immediately contiguous with the existing prime retail area. Debenhams is currently somewhat off-pitch in retail terms, and the site is currently a secondary retailing location. To succeed in creating a new prime location, therefore, a new scheme would have to be as large as the site can physically accommodate, anchored by a new Debenhams department store and other large shops and stores, and include a substantial replacement car park, feeding into the mall at its north end. The site is probably only just large enough for such a scheme, which would have to be a very high density development. It is unlikely that the site would be large enough to include non-retail uses such as residential, in addition to prime comparison goods retailing and a car park.

6.7 The inclusion of Debenhams in the redevelopment scheme is therefore essential. Without the Debenhams site, the car park on its own would be unsuitable for new prime retail development of stores and unit shops. It would be both too small to create a viable scheme, and unable to attract sufficient pedestrian flows from the existing prime retail area. It would only be attractive for one or more large free-standing stores such as a new food store and/or retail warehouses, together with car parking. Such stores, for example a new store for Next, a Matalan store, or a Waitrose supermarket, should be capable of operating in this highly prominent location.

6.8 In view of the need for additional prime retail floorspace in the town centre, we consider that the whole site including Debenhams should be designated for such a use. The Council should then open discussions with Debenhams, a freehold owner and the owners of Littlewoods with a view to pursuing and implementing a joint development on the combined site at an early date. We suggest that the designation does not include the small shops fronting Station Road, because these would be costly to acquire, and their acquisition would not enlarge the site sufficiently to enable substantial additional value to be created. They are also reasonably coherent and attractive and would effectively screen the backs of the shops forming the new mall.

St Ann's Centre Service Yard West

6.9 This is a small site of only about 0.4 hectares, located between the St Ann's Centre and Clarendon Road. The site slopes down from Clarendon Road; and the southern and western sides are taken up by access ramps to the St Ann's Centre car park. As well as being a service yard and loading dock, significant parts of the site are used for staff car parking. To the north west corner, there is a gap in the St Ann's Road frontage in front of the St George's Centre.

6.10 We consider that this site could provide and opportunity for extension of the St Ann's Centre. This would require excavation of the service yard (taking advantage of the fact that much of it is already below Clarendon Road and Kimberley Road) to create a new service basement with ramps down from Kimberley Road. It might also involve reorientation of end of the exit ramp and payment stations for the St Ann's Centre car park, possibly associated with changes to the traffic management arrangements in Kymberley Road and Clarendon Road. Subject to financial viability, it should then be possible to extend the BHS store to the west over the new basement service area, reduce the depth from St Ann's Road of this store, and reassign some of its existing space to create additional large shop units fronting onto the central court of the St Ann's Centre, together with a new entrance to BHS from this central court.

6.11 Such a development could only be undertaken by the owners of the St Ann's Centre, and only with the cooperation of BHS. It would not result in a major expansion of prime retailing. However, the site is immediately adjacent to the prime retail area, and is one of the few ways in which additional prime retail floorspace could be created in this area.

Havelock Place

6.12 This site extends to around 0.7 hectares or so (depending on what land is included). It lies to the east of the St Ann's Centre, and includes part of its east service yard, Havelock Place itself, some properties fronting onto Station Road and St Ann's Road, Fitz Health Club, and buildings fronting onto College Road immediately east of the Post Office. The site is approximately level, although College Road is slightly higher than St Ann's Road, and the eastern part of the St Ann's Centre service yard slopes up to the west. The site is occupied by a mixture of service yards, informal staff car parking, Havelock Place itself, and existing shops (some with offices over) on the frontages. It is a very untidy and somewhat unkempt area, particularly on the east and south sides. The buildings on the Station Road frontage are very undistinguished architecturally (currently occupied by Burger King, Bon Marche and Nationwide, the latter two being particularly ugly). The only vehicular access to the area is via Havelock Place, necessitating vehicles crossing the pedestrianised St Ann's Road at this point.

6.13 We consider that there is potential for significant retail consolidation and expansion in this area – if an alternative vehicular access to the St Ann's Centre service yard and other existing properties could be provided. This could probably only be from College Road, necessitating demolition of the Pizza Express building as a minimum. A better solution would probably be demolition of this building and the building between it and the Post Office, routing the new service access into the site along the west edge of the space so created, and then taking the opportunity to create a new 24 hour through pedestrian route in the form a new shopping street linking College Road to St Ann's Road appoximately along the line of Havelock Place.

6.14 It should be physically possible to excavate the eastern part of the St Ann's Centre service yard to enable the construction of new large shops or stores on the west side of Havelock Place, with a replacement service yard over at first floor level (taking advantage of the change of levels on this part of the site). Demolishing the three shops on Station Road mentioned above would enable the construction of substantial new dual entry shops on the east side of the new Havelock Place. To the south, demolition of Fitz Health Club (and relocation off site) would open up the possibility of an additional large store at this point. The remainder of the new street, particularly on its east side, would probably have to be formed from smaller modern units, suitable for occupation by specialist boutiques, cafes, etc. An improved entrance from St Ann's Road would be obtained if the retail and office building occupied by Body Shop with Travelscene offices over could be replaced by a new building designed with shops facing west onto the new Havelock Place.

6.15 The advantage of such a scheme is that it could provide a range of large and small shops and stores in an attractive new open street, immediately adjacent to the existing prime retail area and springing from it. It would also eliminate the need for vehicles to cross St Ann's Road, thus enabling full pedestrianisation at this point. It would replace an unkempt area in the heart of the town centre with an attractive new near prime pedestrian shopping street, providing 24 access to Harrow on the Hill station from St Ann's Road. It would open the possibility of a new shop unit being constructed on the north side of St Ann's Road on what is now Havelock Place, to eliminate this gap in the retail frontage. It would also improve the prospects for new retail uses being attracted to the station and College Road south site, for example fronting onto College Road, or bounding a new precinct around a reorientated station entrance.

6.16 Potential drawbacks could include difficulty in making such a scheme financially viable, in view of the number of properties which would have to be acquired; and the probable need to make a CPO for site assembly. The need to eliminate staff car parking from the area would be likely to trigger objections, and may necessitate provision of additional long stay parking off-site. The small shop units which would be needed to form part of the scheme, whilst potentially adding to its character, may not add greatly to value, because the occupiers would be less likely to be institutional standard multiple retailer covenants than tenants of large shops and stores.

6.17 Nevertheless, we consider that the area should be designated for retail consolidation and expansion. If it could be achieved, the benefits would be substantial. Designation in the new LDF would help to create the conditions for a scheme to be formulated and come forward. However, the Council would need to take the lead in marketing the opportunity and in site assembly, and appointing a development partner.

Station Site and College Road (south side)

6.18 This is a substantial triangular site on the south side of College Road, extending to approximately 1.7 hectares (excluding properties east of William Carey Way). It is approximately level, and is bounded on the south side by the railway, which is in a shallow cutting at this point. At its western end, the site has the main bus station, adjacent to which is Harrow on the Hill railway station. The site is highly developed, with large office buildings, a large redundant Post office building, 7 small shops fronting College Road, and a Baptist Church. College Road is wide, and has particularly wide pavements on its south side. There is a light-controlled pedestrian crossing between the station and the St Ann's Centre providing a pedestrian route through to St Ann's Road – but the St Ann's Centre is closed outside shopping hours.

6.19 In terms of potential for retail development, the site suffers through being somewhat distant from the prime retail area in St Ann's Road, and from being on the opposite side of College Road from the retail core of the town centre. As a result, the existing shops on the west side of Station Road abutting the site on its east side, are occupied by non-retail service businesses; and 5 of the 7 small shops on College Road itself are similarly occupied. Even on the north side of College Road, east of the St Ann's Centre, only 4 of the 13 shops are occupied by retailers.

6.20 We would expect the proposed redevelopment of the site to include as a minimum some station related retailing, to benefit from the substantial numbers of people using the bus and rail stations. If new premises are provided for the College on this site as part of a comprehensive redevelopment, the additional student and staff population will also assist the prospects for attracting some new retail and service uses. However, to attract larger scale retailing, it would be necessary to reduce the width of College Road and substantially downgrade it as a vehicular route (at least during core shopping hours), and provide a new and attractive 24 hour pedestrian route through from St Ann's Road, such as the scheme discussed above for Havelock Place. Even so, we cannot be confident that larger scale shops and store would let well in this location. We consider it unlikely that such a scheme at Havelock Place could be completed in time for the marketing of new retail units south of College Road, and that therefore it is somewhat unlikely that this site will in practice include large scale new shops and stores. However, we consider that there would be merit in as much retailing as possible being included in the scheme for this site, either fronting onto College Road, or bounding and defining a new precinct in front of the station entrance. Regarding the former, we suggest that the pavement on the south side of College Road (east of the existing station entrance) could be narrowed, and the building line brought forward, so as to increase the depth of the site, and narrow the unnecessarily wide road at this point.

Gayton Road Library

6.21 This is a small site of about 0.3 hectares on the south side of Gayton Road, just east of its junction with Station Road. The site is bounded on the west by an office building, to the south by the railway in a wide shallow cutting, and on the east by a small block of flats known as Sonia Court. The site is approximately level, and is currently occupied by the public library and its car park. We understand that the library may be relocated to a new building elsewhere in due course, and site become surplus to the Council's requirements.

6.22 The site is too remote from the retail parts of the town centre to be capable of accommodating a development of conventional comparison goods shops and stores, and is also too small for such a scheme. In terms of the sequential approach of PPS6, it would be an edge-of-centre site. However, on its own it could be suitable for a discount food supermarket and car park, of which there are none in or on the edge of Harrow town centre at present. Alternatively, it could perhaps attract one or more small retail warehouses with a surface car park – although Gayton Road carries fairly light traffic and so the site has somewhat limited prominence, which could compromise its attractiveness to retailers.

6.23 We consider that the potential of the site would be substantially increased if the site occupied by the Sonia Court flats could be acquired and included with the Library site and the Gayton Road car park site described below. This would result in a much larger combined site of around 1.2 hectares, which would be large enough to accommodate a new food superstore and its car park. We discuss this further below. In the absence of interest from a discount supermarket or retail warehouse operators, we consider that the site would be inappropriate for retail development, and would be better allocated for other uses such as residential or leisure development.

Gayton Road Car Park

6.24 This is a substantial site of about 0.7 hectares, on the south side of Gayton Road. It is east of the Gayton Road Library, and separated from it only by the small site of Sonia Court flats. The site slopes gently to the south, where it is bounded by the railway in a wide shallow cutting. On its east side, the site is bounded by residential properties. It is currently used as a long-stay Council car park. We understand that the Council is reviewing car parking needs, and that the site could potentially be released for development.

6.25 As with the Gayton Road Library site, this site is too remote from the town centre retailing to accommodate any form of prime retail development of conventional stores and shop units. It would be an edge-of-centre or close out-of-centre site in terms of the sequential approach. On its own, the site is not large enough to accommodate a new food superstore and car park (unless the latter was decked). The only retail use which could realistically be accommodated on this basis would be a small retail warehouse park. However, incorporation of the site of Sonia Court and the Library site would create a large enough site for a food superstore development. The drawback to such a scheme is that Gayton Road is not a major traffic route, and therefore has limited prominence, which could reduce the interest of retailers in occupying such a scheme, or the price which they would pay for the site. The same limitation could apply to retail warehouses. Further, Gayton Road is a quiet residential area which would create further problems for retail development. Such development is also currently contrary to the UDP.

6.26 If a new food superstore could be developed, it would improve the attractiveness of the town centre for food shopping, with the potential for more linked shopping trips as some food shoppers also walk into the town centre down Station Road. It would meet the forecast need for such convenience goods floorspace in the town centre. We therefore consider that the possibility of acquisition of Sonia Court should be investigated, and that the enlarged site should be designated for a new food superstore. In the event that marketing of the site does not attract operator interest, it would be necessary to revise the designation to permit other uses, as part of regular review of the LDF. If the Sonia Court site cannot economically be acquired, we suggest that the Gayton Road car park site on its own could initially be designated and marketed for food and non-food retailing (the food component of which could be a discount supermarket – or conceivably a specialist food store such as Marks & Spencer Simply Food, or a Waitrose supermarket). Only if marketing fails to attract operator support should the site be redesignated for other uses, such as residential development.

7 Principal Conclusions and Recommendations

7.1 In this Section, we draw together the principal conclusions from the foregoing, and set out our recommendations for the allocation of sites to accommodate the forecast need for new retail floorspace in Harrow town centre. In doing so, we take account of the vitality and viability of the town centre, and of general national trends in retailing and retail development. We also take account of national planning policies for new retail development set out in PPS6.

The Vitality and Viability of Harrow Town Centre

7.2 Harrow town centre is performing reasonably well against most of the indicators of vitality and viability set out in PPS6:

- It has a low shop vacancy rate.
- Prime shop rental values have been rising steadily since 1993.
- Prime shop property investment yields have remained steady for some time before creeping up slightly, indicating a small weakening of investors' expectations of future rental growth.
- The town centre is highly accessible by bus and rail, with the bus and rail stations located in close proximity. However, the quality and capacity of the interchange is poor. The centre is also easily accessible by car, and there is a range of car parking available of a generally good standard.
- There is a fairly strong demand from retailers, including food store operators, which is frustrated by the lack of suitable and available premises in the town centre.
- There is a strong positive balance of perceptions about the town centre on the part of shoppers and other town centre users; and for daytime use, overall the town centre was rated average to good.
- For daytime use, security in the town centre is regarded as very good or good by over half of users interviewed; with about three quarters regarding it as very good, good, or neutral (neither good nor poor).
- The overall state of the town centre environment is slightly better than neutral on a scale ranging from very poor to very good. The prime retail areas achieved the highest ratings and provide a pleasant and attractive shopping environment.

Weaknesses of the Town Centre

7.3 Against this, Harrow is shown to be a weaker centre than the surrounding centres at the same level in the retail hierarchy:

- Harrow's prime shop rental values are significantly lower than those in the surrounding Metropolitan Centres.

- Its prime shop property investment yields are higher.

- It has less comparison goods floorspace than 8 of the other 9 designated Metropolitan Centres in London (and less than Watford and Brent Cross); and lacks sufficient 'critical mass' of shops and stores to attract high market shares of shoppers' expenditure from a wide area.

- There are currently no proposals for major new retail development in the town centre; whereas proposals are being prepared for significant redevelopment of outdated retailing in Watford town centre, and a substantial expansion of Brent Cross.

- The retail offer in the town centre is somewhat one-dimensional, catering principally for the lower mid-market. There are very few up-market fashion goods shops or brands to attract residents of the higher income parts of the catchment area.

- There is only one department store, and few other larger 'anchor' stores. Many of the shop units in the prime retail area are smaller than are now required by multiple retailers to stock their full range of goods.

Quantitative Need for New Retail Floorspace

7.4 We estimate that the existing main food stores in Harrow town centre and elsewhere in the Borough are currently trading at well above the level based on the respective company averages. After allowing for a reduction in these high levels of sales in the existing main food stores, and taking account of growth in catchment area population and expenditure, our forecasts show that there will be a need for substantial additional convenience goods shop floorspace in the Borough. We consider that available expenditure will be sufficient within the forecasting period to 2016 to support an additional food superstore in or on the edge of Harrow town centre, together with up to two new food superstores elsewhere in the Borough. Alternatively, capacity will be sufficient to support some of this new floorspace being provided in other formats, such as a combination of discount supermarkets, town and district centre format supermarkets, and extensions to existing food stores.

7.5 We consider that in future years, Harrow's market share of catchment area comparison goods expenditure will fall, if there is no substantial new comparison goods retail development in the town centre. Such a fall will be caused by major new retail developments being prepared in Watford and Brent Cross (if these are permitted and implemented). However, if major new retail development is also implemented in Harrow town centre, it should enable the town centre to retain its current market share in the face of the increased competition. On this basis, we forecast a need for about 13,400 sq m net sales area of additional comparison goods floorspace in the town centre by 2011, rising to about 29,100 sq m net by 2016. The latter scale of growth would be sufficient for a substantial scheme anchored by a replacement Debenhams department store, together with substantial new comparison goods floorspace in more incremental development elsewhere in the town centre, within the LDF period to 2016.

Qualitative Need for New Retail Development

7.6 The principal qualitative needs are for more larger shops and stores to attract a wider range of retailers, and enable them to display their full ranges of goods; and to attract retailers selling higher quality goods and brands than at present, so as to attract higher income shoppers from the catchment area. There is also a need to redevelop Havelock Place and provide a new vehicular access to the St Ann's Centre east service yard, which avoids vehicles crossing the pedestrianised St Ann's Road. There is a qualitative need to replace the outdated Debenhams store with a new store, supported by a range of new shops and stores.

Accommodating New Retail Development

7.7 There is only one site in Harrow town centre which could realistically be capable of accommodating growth in comparison goods shop floorspace on the scale needed to enable the town centre to retail its market share in the face of expected increases in competition. This is the site of the Greenhill Way car park and Debenhams store. We believe that (subject to financial viability) this site would be suitable for a new Debenhams department store together with a mall of other large stores and shop units in support. Such a scheme could only be implemented with the full cooperation and involvement of Debenhams. Without that company's commitment, the Greenhill Way car park alone would only be suitable for a large new food store and car park, or some limited free-standing retail stores plus car parking. Neither such development would meet the need for a major new comparison goods shopping development, but would effect a modest improvement in the town centre. However, such a limited development would waste the opportunity for a much larger scale scheme, which would be large enough to assist the town centre to retain its market share.

7.8 We therefore recommend that the whole site, including the Debenhams and Littlewoods stores, Greenhill Way car park, and the smaller car park on the north side of Greenhill Way (but excluding the 'skin' of existing shops on the east side fronting Station Road) be designated for a major retail comparison goods retail development. We also recommend that the Council open discussions with Debenhams and the owners of the Littlewoods store, with a view to working up a major development scheme in partnership, for completion in the period 2011 to 2016.

7.9 The Havelock Place area is another area of opportunity for new comparison goods shopping development in the retail core of the town centre and immediately adjacent to the prime retail area. It is in need of redevelopment, and a new vehicular access to the St Ann's Centre service yard east. The site is very constrained, and could not accommodate new comparison goods shops and stores on the scale needed. However, it could potentially make a significant contribution to meeting development needs, in particular qualitative needs, as well as assisting the improvement of urban design and pedestrian circulation in the town centre. Redevelopment with resulted in a new high quality 24 hour pedestrian route between St Ann's Road and College Road would also improve the prospects for attracting new retail uses to the station and College Road south side redevelopment site.

7.10 We therefore recommend that the Havelock Place area be designated for new retail and related development; with the objective of achieving within the LDF period a new vehicular access from College Road, new shops and stores in a variety of sizes, and a high quality 24 hour pedestrian street linking St Ann's Road to College Road.

7.11 Proposals for a major mixed use redevelopment of the station and College Road south side site are currently in the early stages of preparation. It is expected that the scheme will include at least some station related retailing, but not large scale comparison goods shops and stores. We consider that the site would have difficulty in attracting large scale retail floorspace, because of its location. However, we believe that a commitment to and progress with redevelopment of Havelock Place to create a new pedestrian route from St Ann's Road would increase the prospects for more comparison goods retail floorspace on the site, for example bounding a new piazza forming the station entrance, and/or fronting onto College Road. We therefore recommend that the Council supports the inclusion of new retail floorspace on this site as far as possible, whilst recognising that the amount of such floorspace may not be substantial.

7.12 The St Ann's Service Yard west could provide an opportunity for expansion of the St Ann's Centre in this area. As such, it would create additional prime retail floorspace, which would contribute to improving the retail offer of the town centre. In the event that such proposals come forward, we recommend that they be supported in principle by the Council, subject to satisfactory site planning and design, and access arrangements.

7.13 Neither the Library nor car park sites on Gayton Road are locationally suitable for new prime retail floorspace of comparison goods shops and stores. However, the sites could be attractive for the development of a discount supermarket, and/or non-food retail warehouses. If the intervening Sonia Court flats site could also be acquired and incorporated to provide an enlarged single site, a new food superstore could be possible, if retailer support could be attracted. Because Gayton Road is not a major traffic route, such support might not be forthcoming, but the degree of support could only be established through marketing the site.

7.14 We have identified a need for new food store floorspace in or on the edge of the town centre. The enlarged and combined Gayton Road sites would be potentially capable of meeting this need. If the two sites owned by the Council can be released for development, therefore, we recommend that the enlarged site be designated for new food retail development. Only if marketing of the site results in insufficient interest from developers should the designation be amended to other uses, for example residential development.

Signed: Jonathan Baldock

Name: **Jonathan Baldock** **Position:** Partner

Date: 8th March 2006

For and on behalf of Donaldsons LLP

APPENDICES

Appendices

Appendix 1 Pedestrian Flow Data

Appendix 2 Car Park Proforma and Survey Results

Appendix 3 On-Street Survey Results

Appendix 4 Environment Survey Proforma and Survey Results

Appendix 5 Retailer Requirements List

Appendix 6 Household Survey Questionnaire and Results

Appendix 7 RECAP Model

Appendix 8 Development Site Proforma and Location Maps

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