

Harrow Economic Needs Study Town Centres and Office Update

Final Report

London Borough of Harrow

15 January 2024

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1.0 Introduction

Background

- 1.1 Lichfields was commissioned by the London Borough of Harrow (“LB Harrow” or “the Council”) to prepare an Economic Development Needs Study (“EDNS 2017”), finalised in July 2017. In the years since, the local and national economy has experienced significant demand and supply side shocks, not least the Covid-19 pandemic and associated lockdown restrictions, and more recently the cost-of-living crisis. This has triggered structural changes within the national commercial property market – and in particular the retail, leisure and office markets. Home working has become increasingly common, while firms facing higher operating costs look to downsize their office premises. This report provides a partial update of the EDNS 2017.
- 1.2 The study update has been prepared in line with the National Planning Policy Framework (NPPF) relating to the need to ensure the vitality of town centres (paragraph 86) and the evidence to assess the need for economic development (paragraph 81). The update also takes account of the Planning Practice Guidance (PPG). LB Harrow is currently preparing a new Local Plan and this strategic EDNS update will inform its preparation.
- 1.3 This report provides a quantitative and qualitative assessment of the need for new retail, leisure and other main town centre uses within LB Harrow and policy recommendations. The assessment adopts the findings of a new household survey undertaken by NEMS Market Research in September 2023. The report also provides an office market update to the EDNS, in particularly the commercial property market conditions of the office market and employment land availability. This includes an assessment of current office market conditions within Harrow and the London and national markets more widely, and a reappraisal of floorspace and land supply to determine an updated demand/supply balance position. It is not, however, within the scope of this report to update or revisit the office demand scenarios that were set out in the 2017 EDNS.

Structure of the report

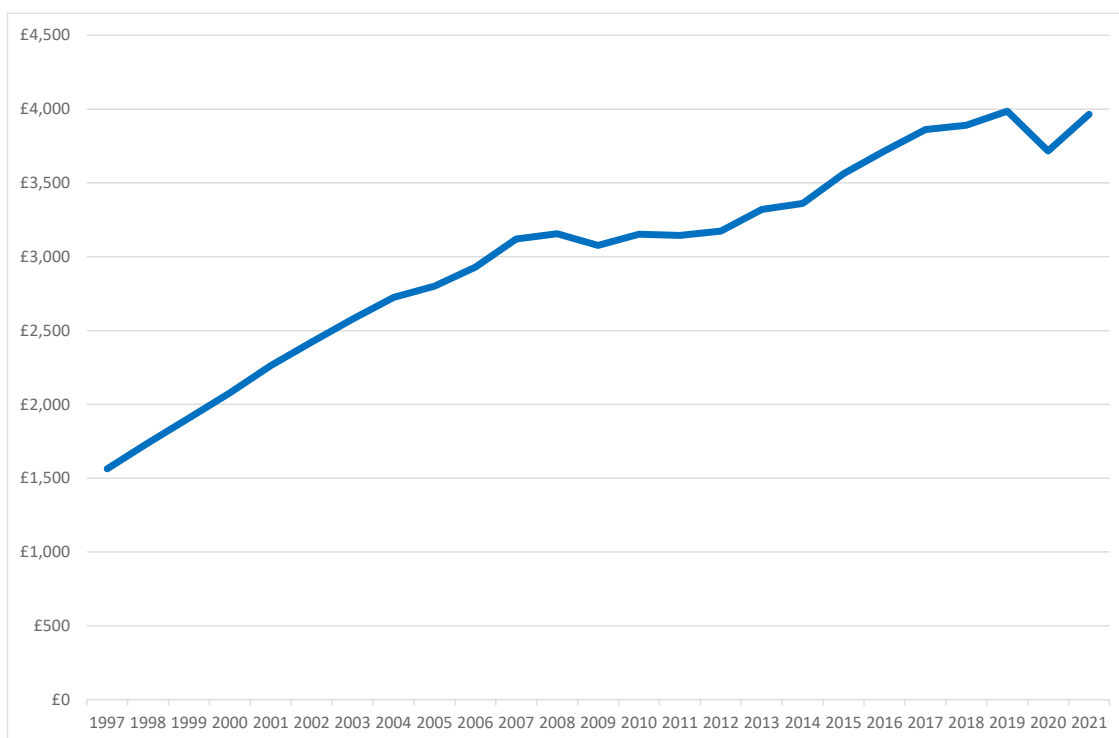
- 1.4 The report is structured as follows:
- **Section 2.0** provides an overview of retail and town centre market trends;
 - **Section 3.0** provides an overview of key office market trends within the Borough and London more widely;
 - **Section 4.0** assesses the need for additional retail and food/beverage facilities;
 - **Section 5.0** assesses the need for additional leisure, entertainment and cultural uses;
 - **Section 6.0** review the overall employment land demand and supply, particularly for offices;
 - **Section 7.0** explores the implications for future development plan policies; and
 - **Section 8.0** sets out the overall conclusions.

2.0 Town centre trends and key changes

Implications of Brexit, Covid-19 and other trends

2.1 Historic trends indicate that consumer expenditure has grown consistently in real terms, generally following a cyclical growth trend. The growth in expenditure per person on comparison retail goods between 1997 and 2021 is shown in Figure 2.1. Experian is a data provider most often used in evidence base studies that provides consumer expenditure data and other economic forecasts. High expenditure growth between 1997 and 2008 fuelled demand for new retail floorspace. However, since the last recession in 2009 expenditure growth has been much slower and the demand for retail floorspace has reduced significantly, particularly comparison goods retail floorspace.

Figure 2.1 Comparison goods expenditure average per head in the UK (constant 2019 prices)



Source: Experian Retail Planner Briefing Note 20 (February 2023)

2.2 Experian's latest forecasts suggest slower expenditure growth and home shopping/internet spending is expected to continue to grow at a much faster rate than traditional shopping. Experian's short-term expenditure growth projections (2022, 2023 and 2024) for retail and leisure now reflect the expected effects of Brexit and the Covid-19 pandemic. The current cost of living crisis will also suppress expenditure growth in the short term.

2.3 The main implications of Brexit, Covid-19 and the cost of living crisis for the evidence base are likely to be as follows:

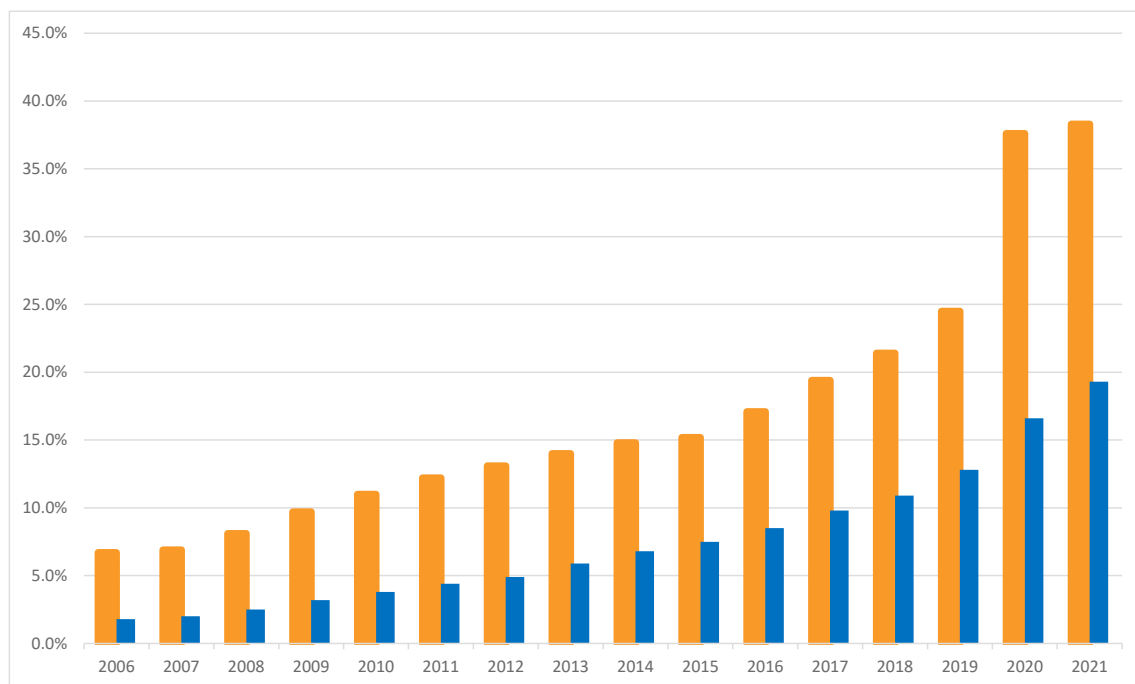
- impact on the reliability of demographic and economic projections i.e. population growth and Experian expenditure forecasts;
- short term impacts on the mix of town centre uses and customer behaviour that are likely to distort the base year position; and
- longer term structural impacts that could affect the nature of town centres and the way households shop, eat/drink out and participate in leisure activities.

- 2.4 The key uncertainties relating to the first two points are primarily the post Covid-19 recovery and the length of the cost of living crisis. The longer-term structural implications are harder to predict and quantify at this stage, however there are already signs of a bounce back in terms of expenditure growth, but the cost of living crisis may suppress this recovery.
- 2.5 In the short term, operators have faced elevated risks to cashflow and increased costs arising from a slump in consumer demand and disruption to supply chains. Non-essential products, hospitality and leisure services were the hardest hit. Short-term supply chain disruption led to inflationary pressures, which will have an impact on consumer demand. Retailers with infrastructure to fulfil on-line orders/home delivery benefitted in the short-term. There is likely to be a long-term structural shift to multi-channel shopping, reducing the demand for physical space within town centres.
- 2.6 Bearing these trends in mind there has been a spike in town centre vacancies with some businesses failing to re-open following the Covid lockdowns, particularly non-food retail operators, restaurants and leisure uses. High levels of inflation and the cost of living crisis are likely to exacerbate difficult trading conditions. Many national operators have already announced job losses and store closures.
- 2.7 Brexit and Covid-19 could have short-term impacts in terms of population migration levels and a pause in construction activity. Given that the focus of this study is to assess the long-term need over the new local plan period within five-year interval projections, development plan policy should assume population projections will return to projected levels before 2030. The population projections in 2030, and certainly later years, should not be significantly affected by the Covid-19 and cost of living crisis. It is not yet possible to understand if the short-term impact will continue into the medium and longer term projections to alter previous trends to any greater extent.
- 2.8 This study has adopted Experian's latest 2021 population estimates, which reflect these trends.
- 2.9 Office of National Statistics (ONS) monthly sales volume information for Great Britain indicated total retail sales volumes during the first Covid-19 lockdown were over 22% lower in April 2020 compared with the pre-Covid position in February 2020 (seasonally adjusted). However, in the period between lockdowns (July and August 2020) sales volumes had recovered to pre-Covid levels. By October 2020 retail sales were 7% higher than the pre-Covid figure in February 2020. However, the reintroduction of Covid-19 restrictions saw a reduction in sales in between November 2020 to January 2021, reaching 5% below pre-Covid levels. Sales had recovered to 9% above pre-Covid levels by April 2021. The seasonally adjusted figures for November 2021 were 6% above pre-Covid levels.
- 2.10 The comparison goods (non-food) sector was particularly affected with a 50% drop in sales from February to April 2020, whilst the food sector experienced a 10% growth in sales

during March 2020 in part due to panic buying at the start of the crisis. Food sales volumes were consistently higher than the February 2020 low point during March to November 2020.

- 2.11 ONS data suggested on-line retail sales (seasonally adjusted) peaked at over 73% higher in May 2020 compared with February 2020. Figures for June 2020 to May 2021 were consistently higher than the pre-Covid sales in February 2020, with a second peak of nearly 81% higher than pre-Covid levels in February 2021.
- 2.12 During the first Covid lockdowns food store on-line sales doubled during May and June 2020 but still represented a relatively small proportion of total sales in this sector, reaching about 11.9% in January 2021, but reducing slightly to 9.7% in November 2021. For the non-food sector on-line sales as a percentage of total sales nearly trebled between February and April 2020, reaching 45% of sales. By November 2021 on-line sales in this sector were still 23.2% of total sales, compared with the pre-Covid level of 16.1% in February 2020.
- 2.13 Experian's Retail Planner Briefing Note 20 (February 2023) suggests non-store retailing's market share increased from 20.1% in 2019 to 30.7% in 2021. Non-store sales include all on-line sales and other forms of sales not generated from physical retail floorspace e.g. vending machines, party plan and deliveries. Comparison non-store sales increased from 24.5% to 38.3% and convenience good sales increased from 12.8% to 19.3%. However, Experian indicates comparison goods non-store sales figure fell slightly during 2022 down to 36%. Nevertheless, the 2022 figures remain significantly higher than the pre-Covid market shares in 2019. The growth in non-store retail sales in the UK between 2006 and 2021 is shown in Figure 2.2.

Figure 2.2 Non-store sales as a percentage of total sales in the UK



Source: Experian Retail Planner Briefing Note 20 (February 2023) – Figure 5

- 2.14 This data shows a sharp increase during the Covid lockdowns during 2020 and 2022. However, Experian forecasts comparison goods non-store sales will have fallen slightly during 2022 down to 36%. Nevertheless, Experian's 2022 forecast figures remain significantly higher than the pre-Covid market shares in 2019.
- 2.15 ONS's post lockdown data suggests retail sales have recovered to previous levels of growth, but the proportion of retail sales spent on-line is a higher proportion of total sales, which will have an impact on traditional bricks and mortar retailing. Conversely the introduction of return fees for on-line shopping and increased free delivery thresholds may benefit traditional retailing. Reflecting these trends, Experian's latest projections recommend relatively modest levels of growth in on-line shopping when compared with historic trends. It is not appropriate to assume a significant shift towards on-line shopping, over and above the levels of growth already predicted by Experian, but a higher shift to on-line shopping is possible. These longer term forecasts should be monitored and kept under review.
- 2.16 The projected proportional increase in home shopping is likely to lead to an increase in demand for local distribution hubs and parcel lockers. Home shopping is also likely to increase delivery traffic in the Borough, but this increase should be more than off-set by the reduction in customers car-borne shopping trips.

Long-term expenditure trends

- 2.17 The current cost of living crisis, including the high level of inflation, has resulted in a reduction in retail expenditure per person during 2022, with many customers either trading down (buying cheaper products or using discount retailers) or cutting back (buying less products). Low growth is predicted during 2023 and 2024 but higher growth is expected in the longer term.
- 2.18 Planning based on long-term expenditure growth projections has always had inherent uncertainties. Despite these uncertainties, development plans should assume a return to reasonable rates of growth, although the implications of the short-term impacts should not be ignored. It is better to plan for a return to growth and then modify the strategy later if levels of growth are lower than originally predicted, rather than not planning for growth because there are significant uncertainties. The latter approach is likely to fail to respond in time if higher levels of growth are achieved, and any growth will go elsewhere. Nevertheless, a cautious approach to expenditure growth, as now suggested by Experian, should be adopted, bearing in mind the uncertainties relating to the growth in on-line shopping.
- 2.19 For convenience goods, Experian's latest forecasts (February 2023) suggest a period of readjustment with the high growth in expenditure experienced during the Covid-19 lockdowns reversed during 2021 to 2024. In the longer term limited growth is forecast between 2025 to 2029 (0.1% per annum), increasing to 0.2% per annum thereafter. Experian expects slow expenditure growth and most of this growth will relate to non-store sales. Any need for new convenience goods retail floorspace in LB Harrow is likely to relate to population growth, high current levels of trading or qualitative areas of deficiency.
- 2.20 Comparison goods expenditure per head is predicted to decline by 2% during 2022 and 2023. A return to modest growth is expected in the longer term (between 2.5% to 3% per annum), but still at a lower rate than previous historic trends (8% per annum between 1997 and 2007). Historically comparison goods expenditure has grown significantly more than

convenience goods expenditure, and Experian's latest national growth rate recommendations are consistent with these past trends.

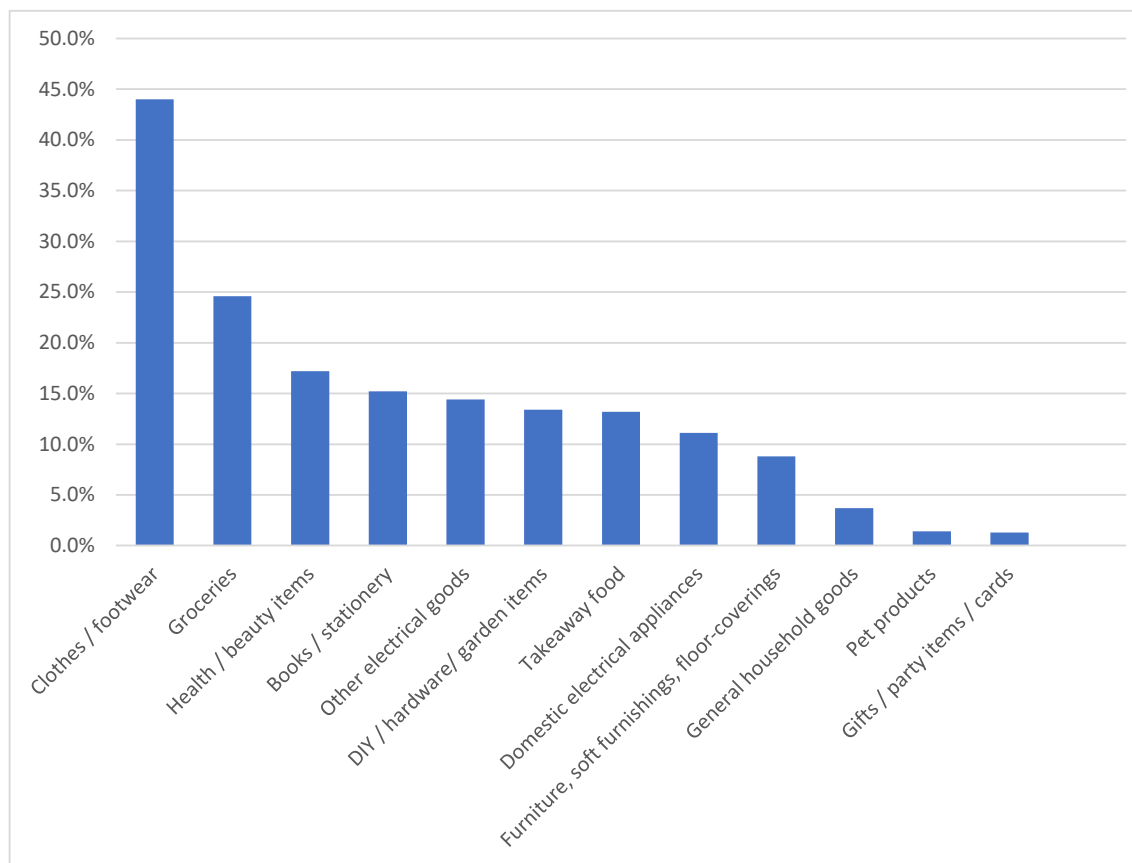
2.21 New forms of retailing (multi-channel and home shopping) have and will continue to grow. Home/electronic shopping and home delivery has increased with the growth in the use of personal computers, smart phones and the internet. Click and collect / click and return shopping has become more popular. Recent trends suggest continued strong growth in multi-channel activity. Experian's Retail Planner Briefing Note 20 (February 2023) states:

"The pace of e-commerce growth is anticipated to moderate over the longer term, but the market share hits 38.2% of total retail sales by 2040."

2.22 The floorspace capacity assessment in this study update makes an allowance for future growth in e-tailing based on Experian's latest projections. Given the likelihood that multi-channel expenditure will continue to grow at a faster pace than other consumer expenditure, the need assessment adopts relatively cautious growth projections for expenditure and an allowance is made for operators to increase their turnover/sales density, due to growth in home shopping and click and collect.

2.23 The household survey results for 802 completed interviews (September 2023) in the Harrow study area, as shown in Appendix 1, indicate many households regularly buy items from the internet for home delivery. The products regularly purchased by households online are shown in Figure 2.3.

Figure 2.3 Items regularly purchased via the internet (% of all households)



Source: NEMS household shopper survey September 2023 (weighted results)

2.24 The survey results suggest 35.4% of respondents do most of their household's non-food shopping on-line and 13% of households did their last main food and grocery shop via the internet/delivery. The results indicate a broad range of non-food goods are purchased, but clothing /footwear and groceries are most often purchased online.

Mode of travel and frequency of trips

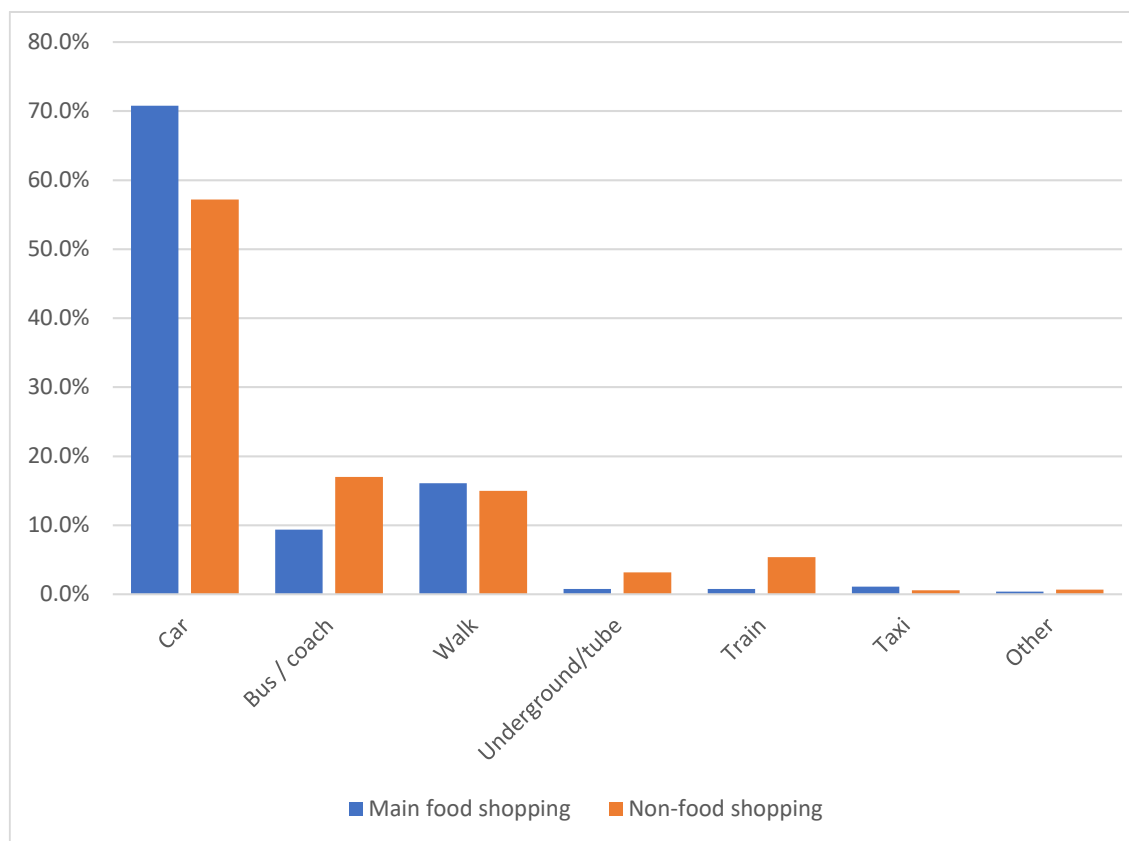
2.25 As indicated above, 35.4% of respondents do most of their non-food shopping on-line and 13% did their last main food and grocery shop via the internet/delivery. Experian suggests over 30% of retail sales was via non-store activity in 2021. These figures suggest many households do not need to travel to undertake food and non-food shopping.

2.26 Despite the increasing proportion of households shopping via the internet, the majority continue to travel to shopping destinations by car. The results for food and non-food shopping (excluding internet/home shopping) are shown in Figure 2.4.

2.27 Shopping by car (driver or passenger) is still the most popular mode of travel for both non-food and main food shopping trips. Relatively low proportions of customers walk or travel by public transport to shop for both food and non-food shopping.

2.28 Car usage is generally higher for main food shopping than for non-food shopping because many households still undertake bulk food and grocery shopping once a week or less often. Non-food shopping trips are generally undertaken less frequently. Bus, train and underground/tube travel is slightly higher for non-food shopping.

Figure 2.4 Mode of travel for non-food and main food shopping (% of travelling household respondents)



Source: NEMS household shopper survey September 2023 (weighted results).

- 2.29 Car travel for food and non-food shopping was high across all zones but is lower than average in Harrow Central (Zone 1). Based on Lichfields' recent experience, car usage for shopping is generally lower within predominantly urban areas and higher in rural areas i.e. normally below 70% of households for main weekly shopping in urban areas. Lower levels of car usage in urban areas is normally due to higher levels of access to shopping facilities, both on foot and via public transport.

Demand for Town Centre Uses

- 2.30 In the past, lower expenditure growth and deflationary pressures (i.e. price cutting) in the non-food sector have had an impact on the high street. Because of these trends, the UK average shop vacancy rate (based on Goad Plan data) increased from around 10% in 2005 to about 14% in 2012. Vacancy rates gradually improved to 11.8% in 2018 but increased to 14.4% in 2022. There has been a sharp increase in shop vacancies in many town centres due to the impacts of the Covid-19 pandemic, Brexit and the growth in on-line shopping. The more recent impact of higher inflation and the cost of living crisis is also likely to constrain consumer demand, which may affect the demand for floorspace at least in the short term.
- 2.31 The Council's surveys during July 2023 indicate the total number of vacant units was 154 in the Borough (in centre and out of centre). The average shop unit vacancy rate in the Borough was 6.5%. This figure excludes Class B, D1/D2 and residential uses in town centres. The Borough's shop vacancy rate is substantially lower than both the UK national pre-Covid-19 average (12.4%) and the current post-Covid-19 average (14.5%). Based on Lichfields' recent experience shop vacancy rates are lower in London than the national average, suggesting the retail sector in the capital is performing better than other parts of the country. This may be due to the high population density and levels of accessibility in London.
- 2.32 The underlying increase in vacant units across the UK is primarily due to the reduction of comparison goods retail outlets. In most centres, non-retail services have helped to replace some of the lost comparison goods retail outlets. A more detailed analysis of the mix of uses in the Borough's main centres compared with the national picture is set out in Appendix 2. This analysis indicates the main centres in the Borough have relatively high levels of convenience goods retail, financial/professional services, restaurant/cafés, hot food takeaways and other non-retail services, which explains the low shop vacancy rate.
- 2.33 Property owners, landlords and funds have come under increasing pressure with struggling occupiers seeking to renegotiate terms through a company voluntary arrangement (CVA), i.e. an insolvency process designed to let a firm with debt problems reach an agreement with creditors to help pay off part or all debts. Elsewhere, retailers have been continuing to 'right size' their portfolios, with operators announcing store closures. These trends have impacted on rental income and the capital value of retail/leisure assets. These trends were exacerbated by Covid-19 and the cost of living crisis and will continue in the short-term.
- 2.34 Whilst the CVA process has created difficulties for landlords in terms of rent negotiations, at the same time, newly freed-up space has provided new opportunities. Vacated premises have been reconfigured and reused for food/beverage, trampolines, climbing walls and indoor golf.

Food store operators

- 2.35 In addition to new forms of retailing, retail operators have responded to changes in customers' requirements. Retailers have also changed their trading formats to include smaller store formats capable of being accommodated within town and local centres (such as the Tesco Express/Metro, Sainsbury's Local, Little Waitrose and Marks & Spencer's Simply Food formats).
- 2.36 Across the UK, the number of Tesco Express, Sainsbury's Local and Little Waitrose stores has increased significantly during the last decade. The number of Tesco Express stores has increased by 35%, from 1,427 stores in 2012 to 1,920 stores in 2020 (source: Mintel). During the same period, Sainsbury's Local stores increased by 83% and the number of Little Waitrose stores doubled. This trend has been evident in LB Harrow with 14 small convenience stores operated by Tesco Express and Sainsbury's Local.
- 2.37 Several proposed large food superstores were not implemented across the country. There has been a move away from larger superstores to smaller formats, reflecting changes in customers' shopping habits, i.e. more frequent but smaller food and grocery shopping trips. This trend may have increased with more homeworking during the pandemic lockdowns, which may not move back to pre-Covid levels in the future.
- 2.38 The expansion of European discount food operators Aldi and Lidl has been rapid during the last decade. These operators are now competing more directly for market share with other main food store operators. Home Bargains and B&M have also expanded rapidly in recent years. This trend is evident in LB Harrow with five Lidl stores and an Aldi store.

Comparison retailers

- 2.39 Comparison retailers responded to difficult market conditions before the Covid-19 pandemic. The bulky goods warehouse sector had already rationalised, including mergers and failures, and scaled down store sizes. Other traditional high street retailers previously sought large out-of-centre stores, for example, Next, TK Maxx and M&S. Matalan also opened numerous discount clothing stores across the UK. Sports clothing retail warehouses including Decathlon and Sports Direct expanded out-of-centre. These trends have slowed significantly and are unlikely to re-emerge for the foreseeable future.
- 2.40 The demand for premises within the bulky goods sector, i.e. furniture, carpets, electrical and DIY goods, has been particularly weak in recent years. This has led to voids on some retail warehouse parks and proposals to extend the range of goods sold to non-bulky comparison goods. This trend has also led to the relocation of non-bulky retailers to out-of-centre locations, creating more vacant units in town centres. However more recently, bulky goods retailers have increasingly looked for smaller stores in town centres particularly in London, for example the B&Q Local format now present in Harrow town centre.
- 2.41 The discount sector has occupied many units on retail parks, e.g. Home Bargains, Poundland and B&M Bargains. The retail warehouse sector is reasonably unrepresented in the Borough, but there are concentrations of retail warehousing in neighbouring Boroughs. In London there has been increasing pressure to redevelop retail warehouse parks for higher density mixed use development.

- 2.42 Within centres, many high street multiple comparison retailers have changed their format. For over two decades, high street national multiples have increasingly sought larger modern shop units (over 200 sq.m) with an increasing polarisation into the larger regional and sub-regional centres. Many multiple retailers now require representation in fewer locations to service catchment areas. This trend is evident in most centres in northwest London with the main focus of comparison goods national multiples present in Brent Cross and Harrow town centre, and a limited provision in other smaller centres.
- 2.43 In general, operator demand for space has decreased significantly during the last 5 years and, of those national multiples looking for space, many prefer to locate in larger centres. Centres in the Borough, apart from Harrow town centre, are at a lower level in the hierarchy and multiple operator demand may be much less in these centres in the future. Much of the occupier demand in smaller centres has come from the discount and charity sectors or non-retail services, rather than higher order comparison goods shopping. Polarisation of investment in the larger centres is likely to continue in the future, with many retailers reducing their overall number of outlets.
- 2.44 The continuation of these trends will influence future operator space requirements in the Borough with smaller vacant units and lower tier centres continuing to be less attractive for new multiple occupiers, and retailers increasingly looking to locate into larger units in larger town centres. However, smaller vacant units could still be attractive to independent traders and non-retail services looking to serve local catchment areas.

Charity and discount shops

- 2.45 The charity shop sector has grown steadily over the past 30 years and there is no sign this trend will change soon. Over concentrations of charity shops have raised concerns in some centres, although these uses provide an important role in provided affordable products for lower income groups and are beneficial in terms of recycling and fundraising.
- 2.46 Notwithstanding the benefits these uses bring, planning policies cannot control the amount of charity shops because they fall within the same use class as other shops (now Class E). In many centres, charity shops have occupied vacated shop premises during previous recessions. This trend is evident in LB Harrow with a strong presence of charity shops in most centres. There are 34 charity/second-hand shops within the Borough, 10.6% of all comparison shops, which is slightly higher than the UK average of 9.9%.
- 2.47 Charity shops can often afford higher rents than small independent occupiers because of business rate discounts. It does not follow that these charity shops will be replaced by traditional shops when the market recovers.

Non-retail services

- 2.48 Service uses perform an important role in the overall offer of a centre and encourage customers to shop locally. The non-retail service uses include the following Class E and Sui Generis uses:
- hairdressers, dry cleaners, travel agents, some sandwich shops (those not categorised as hot food takeaways), funeral parlours and post offices;

- banks, building societies, financial services, betting offices, pawnbrokers, estate agents and employment agencies;
- restaurants, cafés and hot food takeaways; and
- pubs/bars.

2.49 The growth of money lending/pay day loan shops, betting shops and hot food takeaways has raised concerns amongst many local planning authorities and has resulted in a change to permitted development rights to control the growth of these uses in town centres. These trends have been evident in the Borough.

2.50 There are 35 betting shops in the Borough in 2023, which is around 2.2% of all units, comparably higher than the national average (1.6%). The main concentration of betting shops are in Harrow town centre (4 outlets) and Wealdstone (4 outlets). Most other centres have between one and three betting shops.

2.51 There are 121 hot food takeaways in the Borough's main centres, 7.6% of all units, which is above the UK national average of 6.4%. Sudbury Hill (11.1%) has the highest proportion of hot food takeaways, followed by Harrow town centre (10.1%).

2.52 Changes to the GPDO has had an impact on some town centres but the more recent changes to the Use Classes Order (UCO) and permitted development rights (PDR) are likely to lead to more significant changes in the future. These measures allow for much greater flexibility for changes of use from retail to non-retail uses. To date, these measures have not significantly changed the composition of most town centres, which may have been suppressed by the Covid pandemic. The impact of these changes will need to be carefully monitored. The cost of living crisis may increase demand for change from retail to other uses.

The evening economy

2.53 Food/beverage, leisure and entertainment are fast moving and creative sectors, with a steady flow of new concepts emerging. Within these sectors there has been a significant increase in the number of national multiple chains which have sought to increase their geographical coverage, but primarily in larger centres.

2.54 Recently restaurant chains have experienced difficulties resulting in closures, which suggests operators may have over-stretched. Demand continued to increase for coffee shops, such as Starbucks, Costa Coffee and Caffé Nero. National branded pub/restaurant chains invested heavily and not exclusively in larger centres. Themed restaurants also expanded rapidly. This sector in town centres has been the most adversely affected by the Covid-19 crisis and the potential for growth in the short-term is uncertain. The key categories for food and beverage offer are:

- *Impulse*: characterised by their produce range that is typically highly visual and hand-held so that it can be eaten "on the go";
- *Speed eating fast food*: food that can be purchased and consumed quickly, therefore price is low and ambience is less important. This sector is dominated by traditional high volume fast food offers such as burgers and fried chicken;

- *Refuel and relax*: a drink, snack and a short break in a pleasant environment rather than focusing on eating a main meal; and
- *Casual dining/leisure dining*: incorporating several food styles, types and ethnic origins. The ambience and environment of casual dining is as important as the food, drink and service provided. The style is informal but is normally table service.

2.55 The proportion of non-retail uses within town centres across the UK increased significantly before the Covid-19 crisis. This trend was evident in the Borough, and this sector appears to have recovered following the Covid crisis.

Pop-up spaces

2.56 The increase in vacant space across the UK has led to an increase in premises available for temporary uses or pop-up uses including temporary restaurants, bars, shops and galleries. Some landlords have opted for flexible leases, with changing attitudes towards short-term spaces. New independent brands have benefitted despite the lack of brand recognition. E-commerce brands have also sought physical presence, as an essential part of their marketing strategy and an effective way to engage with existing and new customers off-line. Brands have opened pop-up outlets in different locations to test and learn before committing to permanent stores. This trend may increase during the cost of living crisis.

National planning policy and other changes

2.57 The latest version of the NPPF (December 2023) is unchanged in relation to the vitality and viability of town centres. It continues to indicate planning policies should (para. 90):

- define a network and hierarchy of town centres and promote their long-term vitality and viability - by allowing them to grow and diversify in a way that can respond to rapid changes in the retail and leisure industries, allows a suitable mix of uses (including housing) and reflects their distinctive characters;
- define the extent of town centres and primary shopping areas, and make clear the range of uses permitted in such locations, as part of a positive strategy for the future of each centre;
- retain and enhance existing markets and, where appropriate, re-introduce or create new ones;
- allocate a range of suitable sites in town centres to meet the scale and type of development likely to be needed, looking at least ten years ahead. Meeting anticipated needs for retail, leisure, office and other main town centre uses over this period should not be compromised by limited site availability, so town centre boundaries should be kept under review where necessary;
- where suitable and viable town centre sites are not available for main town centre uses, allocate appropriate edge of centre sites that are well connected to the town centre. If sufficient edge of centre sites cannot be identified, policies should explain how identified needs can be met in other accessible locations that are well connected to the town centre; and
- recognise that residential development often plays an important role in ensuring the vitality of centres and encourage residential development on appropriate sites.

2.58 The rapid changes that are affecting the retail sector and town centres are acknowledged and reflected in the current NPPF. It recognises that diversification is key to the long-term vitality and viability of town centres, to 'respond to rapid changes in the retail and leisure industries'. Accordingly, planning policies should positively clarify 'the range of uses permitted in such locations, as part of a positive strategy for the future of each centre'.

2.59 The appropriate balance between retail and other town centre activity has been debated in recent years, as town centres increasingly need to compete with on-line shopping. Covid-19 and the cost of living crisis has elevated this debate. Online shopping is likely to grow faster than previously expected due to shifts in customer behaviour accelerated by the Covid-19 crisis. The need for a better mix of uses within town centre will become increasingly important. A broader mix of uses can extend activity throughout the daytime and into the evenings.

2.60 In September 2020, the UCO was significantly amended. Changes to town centre use classes now allow far greater flexibility for uses to change within town centres without the need to obtain planning permission. The UCO has significant implications for shop frontage planning policies, restricting the ability of local planning authorities to control the mix of uses and retain specific uses previously protected e.g. Class A1 retail.

- 2.61 In relation to main town centre uses, as defined in the NPPF Annex 2 glossary, the UCO changes provide for three new use classes:
- Class E (Commercial, business and service);
 - Class F.1 (Learning and non-residential institutions); and
 - Class F.2 (Local community).
- 2.62 The UCO changes now combine: Shops (A1), financial/professional services (A2), cafés/restaurants (A3), indoor sports/fitness (D2 part), medical health facilities (D1 part), creche/nurseries and office/business uses (B1) into the new single Use Class E. The new Class E includes some uses that are not defined as 'main town centre uses' within the NPPF e.g. medical services and some light industrial uses.
- 2.63 Other changes potentially introduce more restrictions rather than flexibility. Partly in response to the impact of the Covid-19 crisis, there is added protection against the loss of learning, non-residential and community facilities, including museums public halls, sports facilities and local shops. These uses are now included in new Classes F.1 and F.2. Class F.2 also includes small, isolated shops (at least 1 kilometre from a similar shop) selling essential goods including food.
- 2.64 Other potential 'bad neighbour' town centre uses have been placed in the list of Sui Generis uses, with no permitted changes of use e.g. pubs/bars (A4), takeaways (A5), cinemas and live music venues. The inclusion of these uses as Sui Generis appears to have a dual function i.e. controlling potential 'bad neighbour' uses such as pub/bars and takeaways, whilst protecting against the loss of other cultural facilities such as cinemas and music venues, most vulnerable to the impacts of Covid-19.
- 2.65 The previous distinction between Class A3, A4 and A5 uses has become more critical, with Class A3 uses now having more flexibility in the new Class E, but no flexibility for Class A4 and A5 uses. Many Class A3 restaurants offered a takeaway service during the Covid-19 crisis and the categorisation of bar/restaurants has always been arguable and will be a matter of fact and degree on a case-by-case basis. In response to these changes, future land use surveys should categorise uses within centres and frontages to reflect the new UCO, which is helpful when considering appropriate policy options and change of use planning applications.
- 2.66 The potential implications of permitted changes in use outside town centres may also have unintended consequences. In theory large out-of-centre B1 office buildings or D2 commercial leisure uses, with no restrictive conditions, could be converted to retail use without planning permission or an assessment of the impact on the town centre or application of the sequential test. Allowing retail uses to occupy out-of-centre buildings could run counter to the objective of maintaining and enhancing town centres. This change could have implications for the effectiveness of retail impact and sequential test policies.
- 2.67 In December 2020, the Government began a consultation on a variety of further changes to permitted development rights relating to housing delivery and public service infrastructure. The consultation included a proposed Class E to Class C3 permitted development right. The outcome of several elements of this were published and the associated amendments to the Town and Country Planning (General Permitted Development) (England) Order 2015

(GPDO) which were laid before Parliament in the Town and Country Planning (General Permitted Development etc.) (England) (Amendment) Order 2021.

- 2.68 A new Class MA business and commercial to residential permitted development right has introduced certain commercial to residential permitted development rights. The new class MA is different to previous retail and office to residential PD rights, with several different limitations and conditions. Delivering housing and the reuse of redundant shopping space is the Government's priority and the Class MA permitted development right emphasises this.
- 2.69 The new permitted development rights effectively reduce the scope of office to residential permitted development while increasing the scope of retail to residential and introduce new PD rights for other town centre uses to change to residential. These PD rights are subject to floorspace, vacancy and location limitations.
- 2.70 Class MA allows many properties within Class E to change to residential without consideration of impact on the high street where the proposal is outside of a conservation area and limited consideration if it is within a conservation area. The impact on the character and sustainability of the conservation area needs to be considered for ground floor proposals. There may also be restrictive planning conditions or legal agreements that prevent change of use via Class MA.
- 2.71 Only listed buildings and their curtilage and properties in the most sensitive locations such as World Heritage Sites, National Parks and Areas of Outstanding National Beauty are excluded from the new PD right. The legislation requires assessment of loss of retail and office in beautiful and heritage locations, but in no other retail or business destinations. The retail assessment required by the previous Class M PD right falls away.
- 2.72 Subject to limitations and conditions, former uses classes Class A1 (shops); Class A2 (financial and professional services); Class A3 (food and drink); Class B1 (business); Class D1(a) (non-residential institutions – medical or health services); Class D1(b) (non-residential institutions – crèche, day nursery or day centre) and Class D2(e) (assembly and leisure – indoor and outdoor sports), other than use as an indoor swimming pool or skating rink, now benefit from the Class MA PD rights.
- 2.73 The permitted development right does not apply if more than 1,500 sq.m of cumulative floorspace is to be converted. This is significantly more than the 150 sq.m permitted under Class M retail to residential at present, but a significant new restriction for office to residential change of use via permitted development. Most retail units within town centres are below this threshold and converting only part of a building is permitted.
- 2.74 To benefit from Class MA, the use of the building must have fallen within Class E or one or more of the uses that it replaced for at least two years continuously prior to the date the prior approval application is made. The building must have been vacant for a continuous period of at least 3 months immediately prior to the date of the application for prior approval. A key change arising from Class MA is the loss of a prior approval matter considering the impact of the loss of retail.
- 2.75 In a conservation area and where the change of use is at ground floor level, the impact on the character and sustainability of the conservation area is another new prior approval

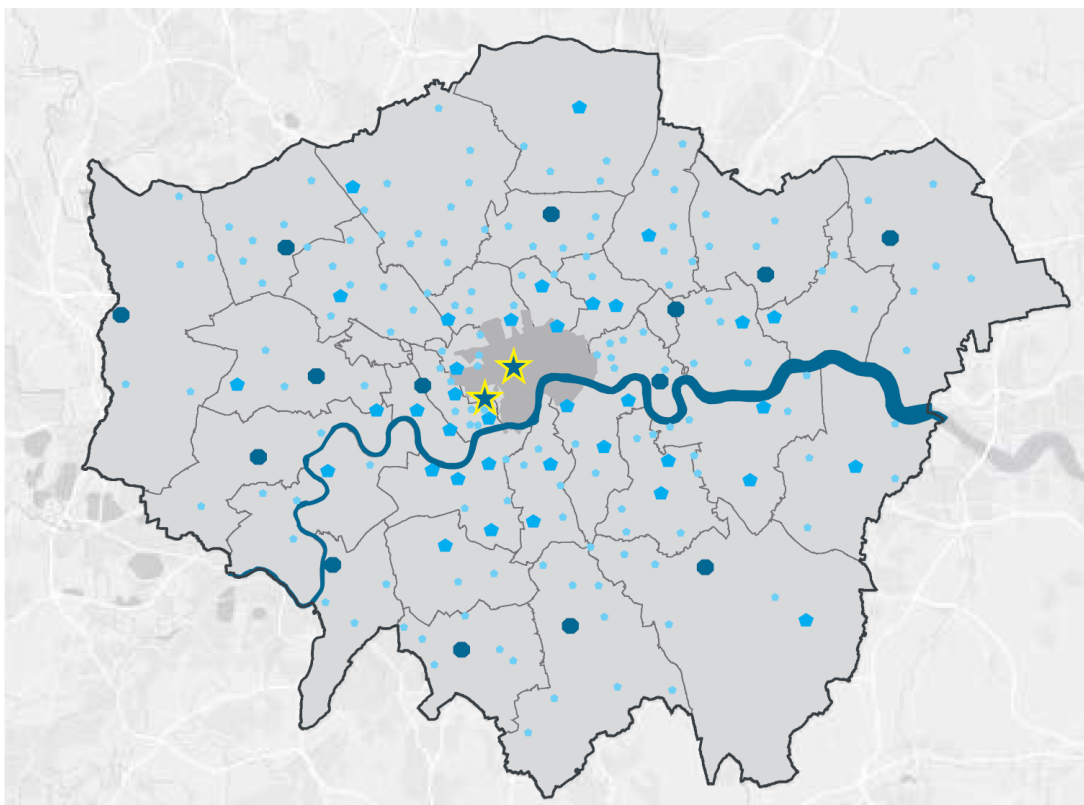
matter. Addressing this matter could potentially include a limited assessment of retail impact.

2.76 The requirement to meet space standards in relevant prior approval applications came into force in April 2021. The GPDO does not grant permission for any dwelling that would be less than 37 sq.m or would not comply with the nationally described space standard. These measures have raised concerns about the potential impact on high streets and shopping parades, which are essential to support local communities.

Hierarchy of centres

2.77 The London Plan (2021) sets out the London wide hierarchy of town centres down to District Centre level, as shown below in Figure 2.5. International Centres are in Central London. Westfield at Shepherds Bush is expected to become a new International Centre. The outer London suburbs in West and Northwest London are served by four Metropolitan Centres i.e. Ealing, Harrow, Hounslow and Uxbridge. Harrow town centre is the highest tiered centre in LB Harrow. Edgware, Hayes and Wembley town centres are third-tier Major Centres. LB Harrow has six District Centres entirely within the Borough boundary at North Harrow, Pinner, Raynes Lane, South Harrow, Stanmore and Wealdstone. Burnt Oak, Kingsbury and Kenton are also District Centres but only partially within the Borough.

Figure 2.5 London's town centre network



Source: GLA London Plan (2021)

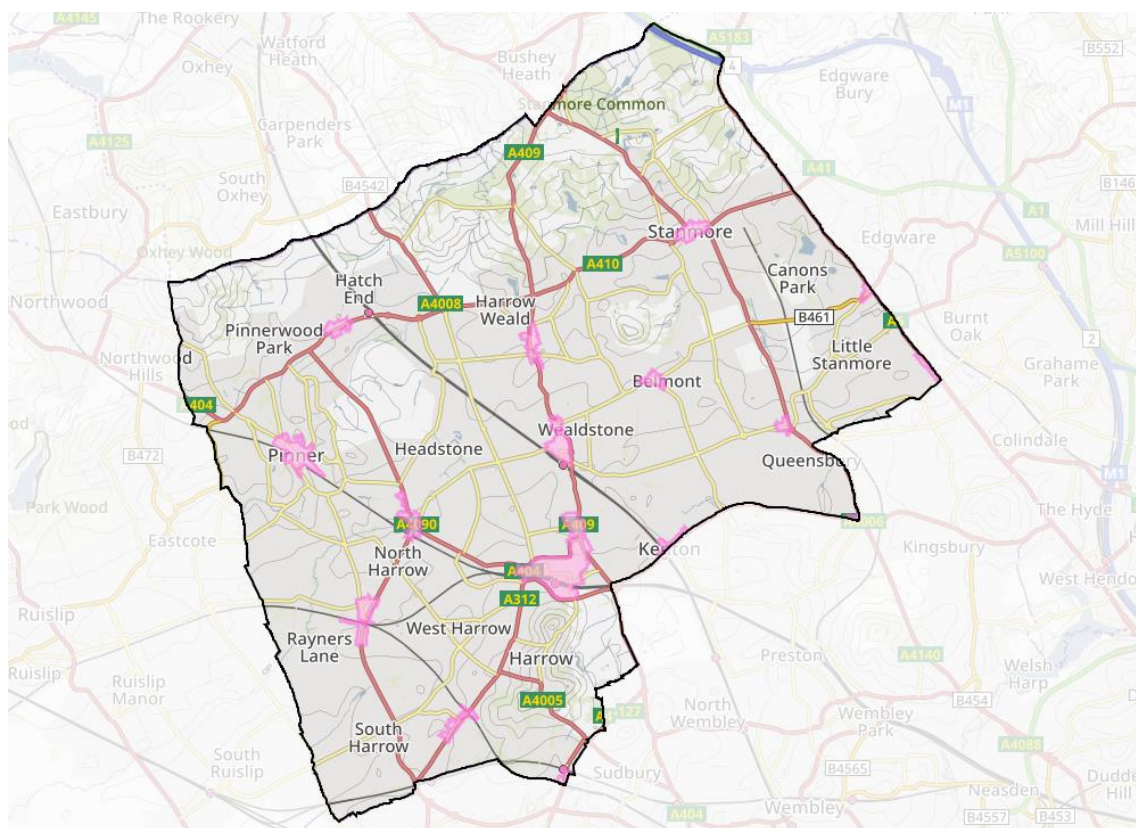
- ★ International
- Metropolitan
- Major
- District
- ☼ CAZ

- 2.78 The London Plan indicates Metropolitan Centres, such as Harrow, serve wide catchment areas covering several boroughs, whilst Major Centres including Edgware may have smaller catchment areas. District Centres are smaller with between 5,000 to 50,000 sq.m of retail, leisure and service floorspace space. Local and neighbourhood centres are not identified in the London Plan and are expected to serve localised catchment areas. The household survey results and market share estimates shown in the retail capacity analysis in this report, confirm Harrow town centre has a borough-wide catchment area, whilst the other centres have more localised catchment areas.
- 2.79 The reclassification of town centres within the Borough at District Centre level and above would need to be promoted through future London Plan reviews.

Designated centres in LB Harrow

- 2.80 The Harrow Local Plan Core Strategy 2012 is consistent with the London Plan, designating Harrow town centre as a Metropolitan Centre at the top of the hierarchy and ten District Centres. Edgware is a Major Centre but is predominantly in LB Barnet and Kingsbury District Centre is also largely within LB Brent.
- 2.81 There are five designated Local Centres at Belmont, Harrow Weald, Hatch End, Sudbury Hill and Queensbury. The town, district and local centre boundaries are shown in Figure 2.6. Designated centres in LB Harrow are summarised in Table 2.1, based on the Council's latest land use survey in July 2023.
- 2.82 This information indicates that the District Centres vary significantly in terms of the number of units. However, all District Centres are larger than the designated local centres (Note: Burnt Oak is only partly within the Borough and has more than 61 units in total. Local Centres are generally smaller (less than 80 units) and have a more limited range and choice of comparison goods shopping. Only Hatch End Local Centre is of a scale potentially large enough to be considered as a District Centre but as indicated above, this upgrade would need to be promoted through the London Plan review process.

Figure 2.6 Designated town centre boundaries in LB Harrow



Source: LB Harrow Planning Maps (on-line)

Table 2.1 London Borough of Harrow’s designated centres – number of units by use

Centre*	Total retail units	Comparison goods retail	Convenience goods retail	Food/ beverage	Services	Vacant
Metropolitan Centre						
Harrow	347	76	37	94	99	41
District Centres						
Rayners Lane	184	28	35	44	73	4
Wealdstone	162	24	30	42	53	13
Pinner	155	41	14	35	57	8
South Harrow	114	26	29	20	38	1
North Harrow	92	20	15	22	29	6
Kenton	90	18	14	15	38	5
Stanmore	87	20	11	19	33	4
Burnt Oak (part)	61	15	13	12	17	4
Local Centres						
Hatch End	79	18	8	25	22	6
Queensbury	68	13	14	16	23	2
Harrow Weald	61	9	11	15	23	3
Belmont	56	7	9	13	26	1
Sudbury Hill (Part)	36	5	13	9	9	0

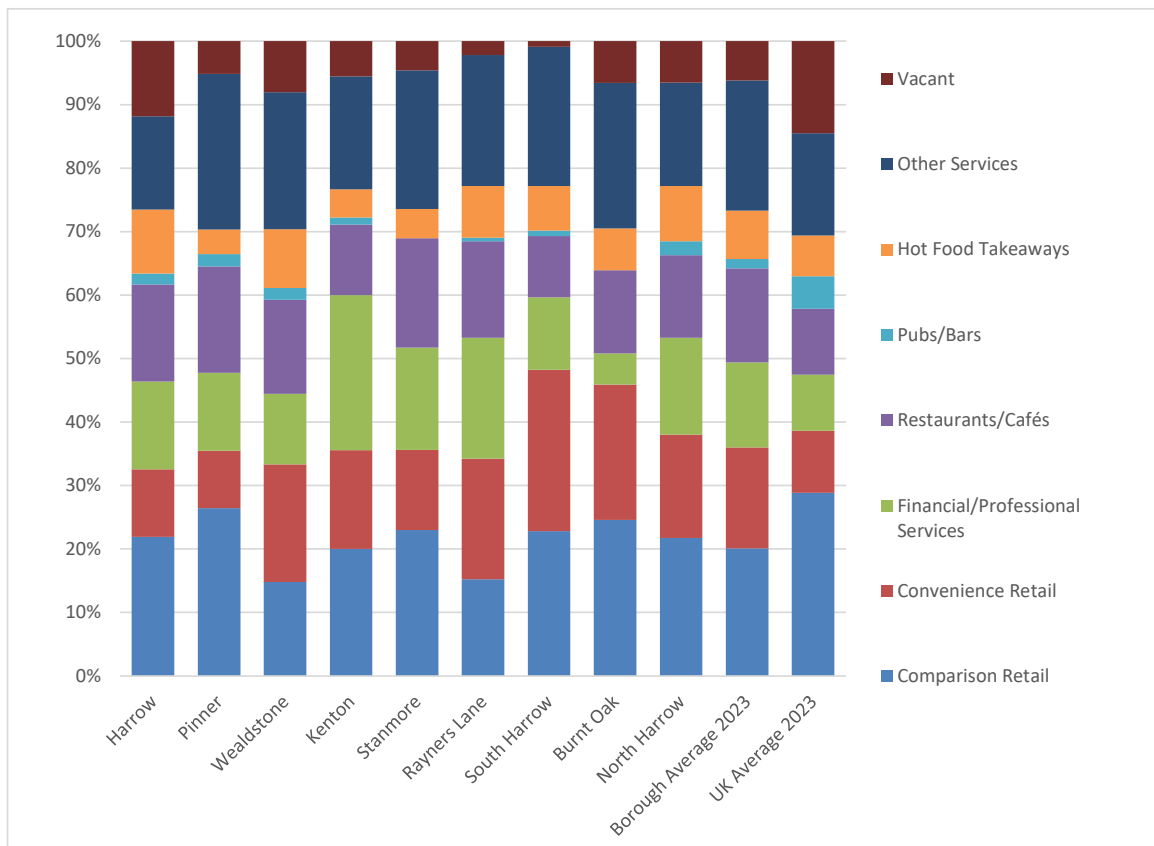
Source: LB Harrow Land Use Survey 2023. *excludes Edgware and Kingsbury with are predominantly located outside LB Harrow.

2.83 Figure 2.7 below shows the composition of Harrow Town Centre and the eight District Centres within LB Harrow in terms of the mix and proportion of different uses i.e. the proportion of shop units within each use class. This is compared with the Borough and Goad Plan average mix for all centres across the UK. More detail is provided in the audit of centres in Appendix 2.

2.84 The centres have a relatively good mix of retail and service uses overall, with low levels of vacant units. All the centres in the Borough have a below average rate of comparison goods retail units compared to other UK centres (28.8%), with Wealdstone (14.8%) and Rayners Lane (15.2%) amongst the lowest. Most of the centres have a higher proportion of convenience goods retail units than the national average (9.8%). Harrow and Pinner, which are the largest centres in the Borough in terms of floorspace, have the lowest proportions of convenience goods retail units.

2.85 In terms of non-retail services, including financial/professional and other non-retail services, all centres have a strong representation and a higher proportion than the national average (24.9%). Kenton has the highest rate of financial/professional services (24.4%) and the highest proportion of total non-retail services (42.2%) in the Borough, whilst Burnt Oak has both the lowest rate of financial/professional services (4.9%) and the lowest proportion of total non-retail services (27.9%).

Figure 2.7 Mix of retail and service uses in LB Harrow Town and District Centres



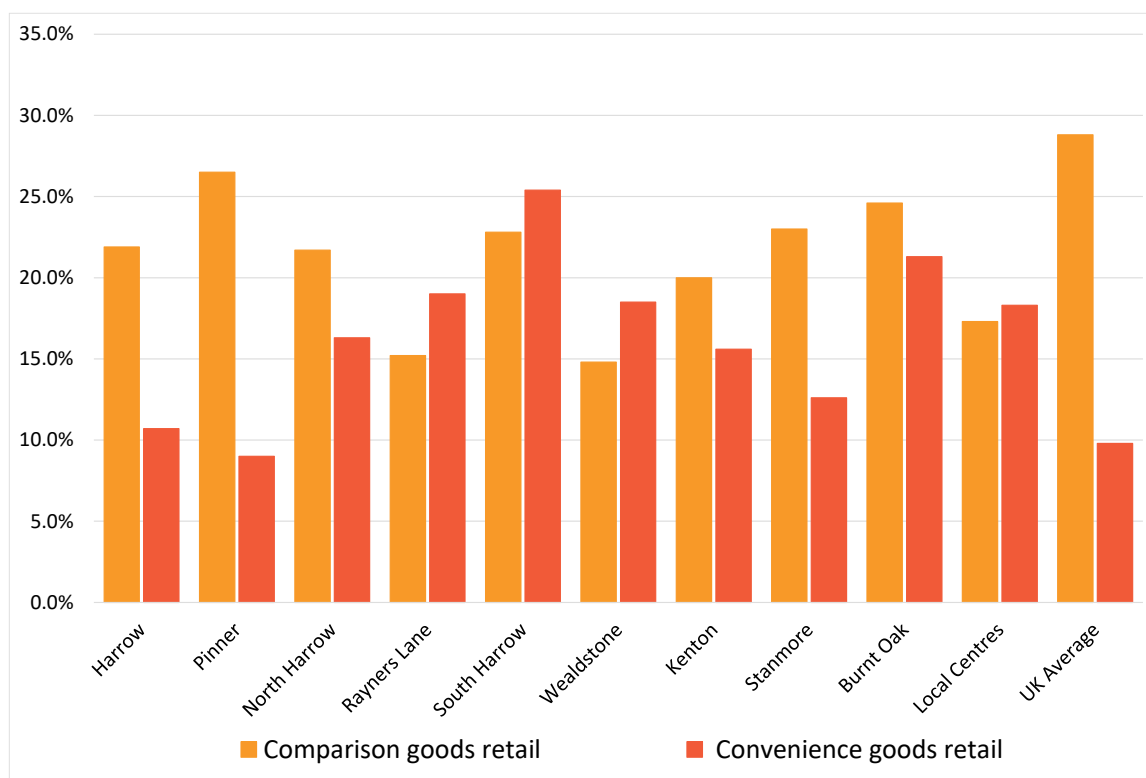
Source: LB Harrow land use survey July 2023; Experian Goad UK town centres averages data.

2.86 The food/beverage offer is reasonably strong in all centres, particularly for restaurant/café uses. However, provision of pubs/bars is markedly lower, with the Borough’s average at 1.5% compared to the national average rate of 5.1%.

2.87 Vacancy rates in the Borough (average of 6.2%) are significantly lower than the current national average (14.5%). Harrow town centre has the highest vacancy rate in the Borough at 11.8%, but still comfortably below the UK average. LB Harrow’s previous land use survey conducted in June 2016 indicate that the overall vacancy rate in the Borough at the time was 5.9%, with a national average of 11.8% in 2016. The small increase since 2016 may be due to the impact of Covid-19 lockdowns, although at present, there is no evidence of a significant post-Covid spike in shop vacancy rates, which suggests centres in the Borough are continuing to perform reasonably well post-Covid. As well as the Covid pandemic, Brexit and shifting consumer trends toward online shopping have accelerated vacancy rates generally in the UK.

2.88 Figure 2.8 compares the proportion of convenience and comparison retail units within centres in LB Harrow compared with the national average. Most centres have a similar or higher proportion of convenience goods outlets when compared with the national average. Convenience goods representation is particularly strong in South Harrow and Burnt Oak. Pinner has the highest proportion of comparison goods retail uses, but conversely, its convenience goods retail provision is the lowest for the Borough. Pinner’s rates of both convenience and comparison retail units are still in line with the national average.

Figure 2.8 Proportion of comparison and convenience retail (% total units)



Source: LB Harrow land use survey July 2023; Experian Goad UK town centres averages data.

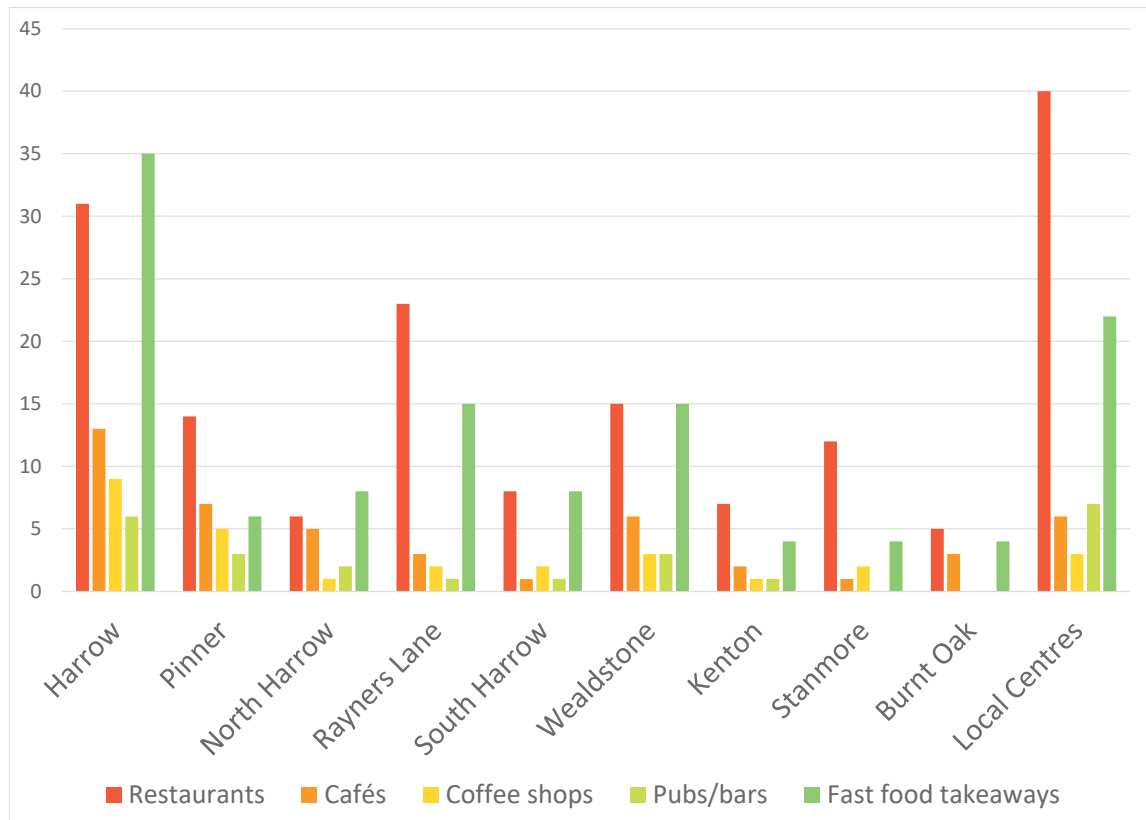
2.89 Generally, bigger centres in the UK have a higher proportion of comparison shop units than smaller centres and this is mostly the case in LB Harrow. Larger centres tend to have a stronger focus on fashion shopping and therefore have a higher proportion of comparison shops. Smaller centres tend to have a higher proportion of convenience goods units and non-retail services, catering for the day-to-day needs of their local catchment area. This is generally reflected in LB Harrow’s centres. Convenience goods retail and non-retail services perform an important role in district and local centres, serving relatively localised needs.

2.90 Service uses perform an important role in the overall offer of a centre and encourage customers to shop locally. This local role increased in the London suburbs during the Covid lockdowns. Figures 2.9 and 2.10 below summarise the number and proportion of units in different non-retail service categories. The service uses are categorised as follows:

- financial and professional services including banks, building societies, financial services, estate agents and employment agencies;
- food/beverage uses including restaurants, cafés, pubs, bars and hot food takeaways;
- other non-retail services including a wide range of uses, such as hairdressers, dry-cleaners, travel agents, beauty salons and post offices.

2.91 The number of food/beverage outlets available in LB Harrow centres is examined in Figure 2.11. Most of the centres, except Harrow and Pinner, have a relatively poor mix of food/beverage outlets. However, all centres have a relatively good provision of restaurants, while offering a more limited range of other outlets such as fast food takeaways and pubs/bars. Harrow and Rayners Lane have the strongest provision of outlets serving the evening economy, i.e. restaurants (rather than cafés and coffee shops) and pubs/bars. Local centres also provide a wide choice of food/beverage outlets, with many of LB Harrow’s restaurants located in the smaller local centres.

Figure 2.9 Distribution of food/beverage outlets (number of outlets)

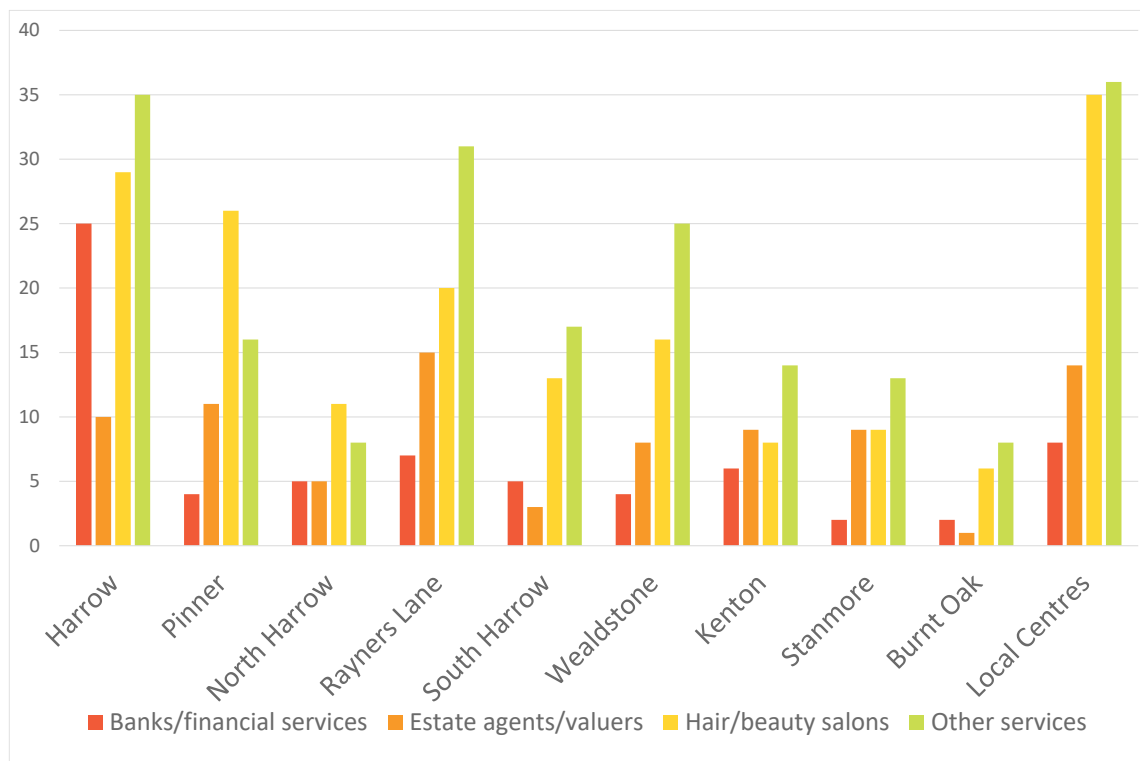


Source: LB Harrow land use survey July 2023.

2.92 As shown in Figure 2.10, Harrow, Rayners Lane, Wealdstone and the local centres have numerous other services, e.g. dry cleaners, launderettes, funeral directors, car repairs, tailors, travel agencies, betting shops, etc.

2.93 Banks and financial services are concentrated in Harrow town centre. All the centres have a reasonable choice of other services, particularly hair/beauty salons. Local centres also provide a wide choice of non-retail services. Most of LB Harrow’s hair and beauty salons are in the smaller local centres.

Figure 2.10 Distribution of other non-retail service uses (number of outlets)



Source: LB Harrow land use survey July 2023.

Summary

2.94 The trends and changes highlighted in this section, including the growth of home shopping, are not new and have been affecting the high street for many years. In response to these trends, most town centres have changed and diversified. The food/beverage, leisure and non-retail service sectors have to some extent been successful in occupying space no longer attractive to retail tenants. However, the shop vacancy rate in LB Harrow remains relatively low, below the UK average.

2.95 There have been cyclical trends in vacancy rates reflecting the macro-economic trends, but in most cases, town centres recovered during periods of stronger growth. Many believe the most recent decline is structural rather than cyclical and a more flexible approach to town centre uses is required.

2.96 The most recent trends suggest vacancy rates have been slow to recover in weaker centres, and many high street retailers are still experiencing difficulties. The Goad national shop vacancy rate has increased to over 14% and therefore a cautious approach to future development needs is required. The implications of the cost of living crisis also endorse a cautious approach to providing additional retail floorspace, particularly in out-of-centre locations.

- 2.97 Shopping behaviour will continue to change, and town centres will need to respond. All centres will need to focus on their advantages over other forms of multi-channel shopping, for example, using the internet as an extended shop window, click-and-collect facilities, and providing a combined retail, leisure and cultural experience for those looking for a "day out" or "evening out".
- 2.98 The analysis of the hierarchy of centres in this section indicates LB Harrow has a well-established network of centres that currently serve their respective areas. Harrow town centre is the only centre with a truly borough-wide catchment area. An audit of the town centres is assessed in more detail in Appendix 2.
- 2.99 The town centre vacancy rate has increased since 2016 but remains well below the current national average. Continuing to identify the hierarchy of centres in the Council's future development plans is important in terms of:
- ensuring the vitality and viability of centres is maintained and enhanced as important hubs for the community, through the application of the impact test;
 - directing retail and main town centre uses to appropriate accessible and sustainable locations, through the application of the sequential approach to site selection; and
 - identifying a viable role and strategy for each centre.
- 2.100 The network of centres should continue to be protected and enhanced to ensure appropriate accessibility to important facilities for all sections of the community and to ensure sustainable shopping patterns.

3.0 Office market trends

- 3.1 This section provides an overview of key office market trends within LB Harrow and London more widely. It is based on published sources, including data and market intelligence sourced from CoStar¹.

National and regional market outlook

- 3.2 Nationally, investment in the commercial property market was dampened in 2023, primarily due to higher interest rates. The Q2 2023 RICS UK Commercial Property Monitor² found that 68% of survey respondents felt that the market was facing a downturn and believed that the ‘deteriorating credit environment’ played a role.
- 3.3 The tenant demand gauge³ for the commercial property market saw a net balance of -10% of contributors in Q2 2023, down from -3% in Q1. Within the office market sector, tenant demand fell, with a net balance of -21%. The availability of leasable office space has risen every quarter since the onset of the Covid-19 pandemic, and this trend continued in Q2. Prime office rents, however, are anticipated to rise by a net balance of +22%; meanwhile, expectations for rental values of secondary grade office stock posted a net balance of -47%, down from -37% in the previous quarter.
- 3.4 The investment demand gauge for the office sector declined to -34%, compared to an all-sector average of -22%. A primary source of the deterioration is the lending environment; the credit conditions indicator recorded a net balance of -75%, the most negative since records began in 2014. Further, the RICS finds rising bond yields may be exerting downward pressure on capital values.
- 3.5 All commercial property sectors are anticipated to experience a decline in capital values over the next year. Secondary office values have experienced a significant decline to a net balance of -54%, while prime offices posted a net balance of -17%.

London office market

- 3.6 The national trends in the commercial office market are mirrored in the London regional market. Based on CoStar office market data, Q3 2023 saw leasing figures improve after weak performance in Q1 and Q2, however, net absorption (the difference between space occupied and space vacated) for 2023 to date remains negative.
- 3.7 A significant number of new office completions combined with weak demand has pushed vacancy rates in London up to a 20-year high of 9.2%, compared to a pre-pandemic average of 5%. While demand for high-quality spaces has been positive for the past three years, older, poorer-quality office stock is a key contributor to net absorption following trends seen nationally.
- 3.8 Average rents across office space in London are projected to fall in the short term as vacancies rise, except for the highest-quality units.

¹ CoStar is one of the UK’s largest independent commercial property data and analytics providers.

² RICS (2023) UK Commercial Property Monitor, Q2 2023.

³ The tenant and investment demand gauges are measures produced by RICS based on their commercial property market survey, reflecting the market expectations of a range of industry professionals.

- 3.9 Two-thirds of office floorspace in the London market are within central London. Despite strong growth in floorspace within the centre, outer London submarkets have experienced a net loss in stock particularly through conversion of office space to alternative uses, including residential. Balanced with low demand, the net loss in office space has kept vacancy rates in outer London submarkets relatively low.
- 3.10 Sales in the London market have mirrored national patterns of decline, with short-term projections anticipating that sales volumes will remain suppressed for the rest of 2023 as interest rates are expected to remain high and credit conditions have tightened. The rolling annual investment figure for London offices is £7.5 billion, the lowest level since 2009, during the trough of the financial crisis. Sales outside of central London are focused on office-to-residential conversions.

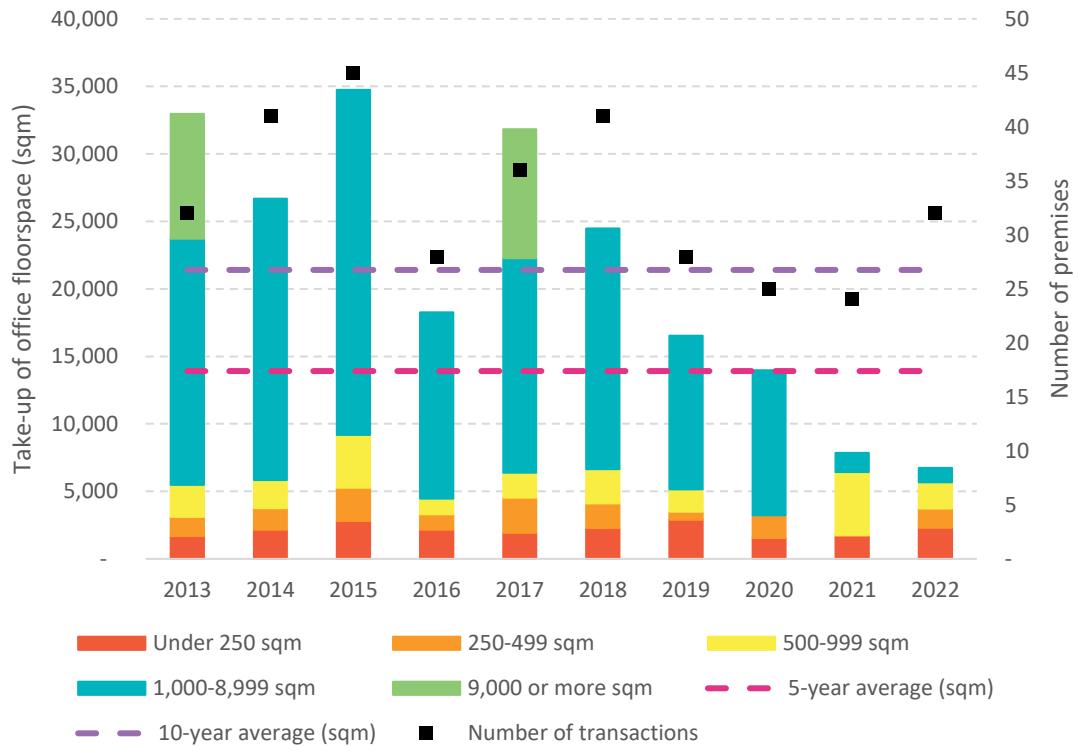
Local office market

- 3.11 The LB Harrow office submarket contains over 260,000 square metres (sq.m) of office space, however, the quantum of floorspace has declined over the past decade as weak demand has driven a significant number of office-to-residential conversions. Vacancy has recently reached a five-year high at 4.8%, while net absorption over the 12 months to October 2023 has reached -2,500 square metres. At present, no new office premises are under construction, implying the upward pressure on vacancies is solely demand-side.

Take-up

- 3.12 According to the latest available CoStar property data, total office take-up (leases and sales) in Harrow between 2013 and 2022 totalled 220,000 sq.m; take-up to date in 2023 has reached 2,750 sq.m. The 10-year average for 2012-2022 was 21,400 sq.m, compared to a five-year average for 2018-2022 of 13,900 sq.m. This data is presented in Figure 3.1.
- 3.13 Over two-thirds (70.7%) of floorspace take-up between 2012 and 2023 was attributed to larger offices of over 1,000 sq.m, while 10.8% of take-up comprised small offices of less than 250 sq.m. However, 64.9% of office transactions were attributed to office premises under 250 sq.m, whereas offices over 1,000 sq.m contributed to just 13.1% of take-up over the period.
- 3.14 Take-up rates peaked in 2015, when total floorspace take-up amounted to 34,700 sq.m, from 45 transactions. Since the pandemic, take-up of floorspace has fallen, totalling 6,700 sq.m in 2022 – the lowest figure observed in the Harrow submarket since 2012. However, the number of transactions in 2022 was 32, the highest since 2018. This further demonstrates the trend towards take-up of smaller office units in the area.

Figure 3.1 Office take-up in Harrow Borough by size (2013 – 2022)



Source: CoStar (October 2023) | Lichfields Analysis

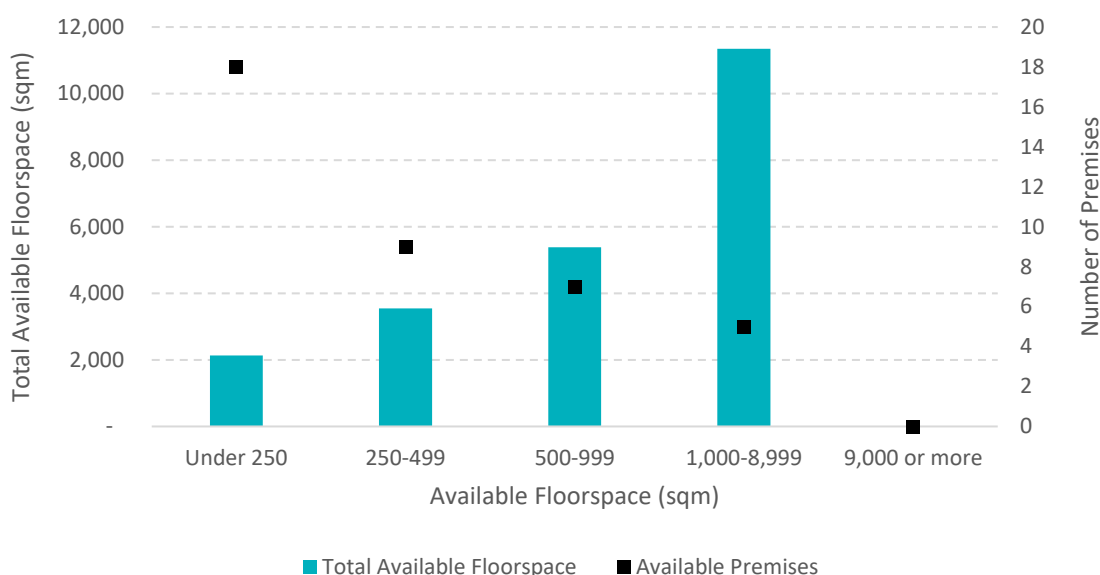
Availability

3.15 CoStar data indicates that the current available⁴ stock of office floorspace in LB Harrow is in the region of 22,400 sq.m, which equates to approximately 8.4% of the total office stock within the Borough.

3.16 Figure 3.2 shows that most of the available office floorspace (51%) is within larger office units of over 1,000 sq.m. This floorspace is distributed across five properties with an average total floorspace of 3,700 sq.m. The remaining available floorspace under 1,000 sq.m is distributed across 34 properties with an average total floorspace of 1,700 sq.m.

⁴ Available floorspace is defined as space that currently is marketed for lease or sale, regardless of whether the space is currently vacant, occupied, available for sublease, or will become available at a future date.

Figure 3.2 Availability of office floorspace in Harrow Borough, October 2023



Source: CoStar (October 2023) | Lichfields analysis

3.17 Table 3.1 shows the available office supply measured against the five-year and 10-year average annual take-up across Harrow. This indicates that for office floorspace, there is currently an estimated 1.05 years of supply when measured against the 10-year take-up average, and 1.61 years of supply when compared to the five-year average.

Table 3.1 Years of available office supply in Harrow Borough

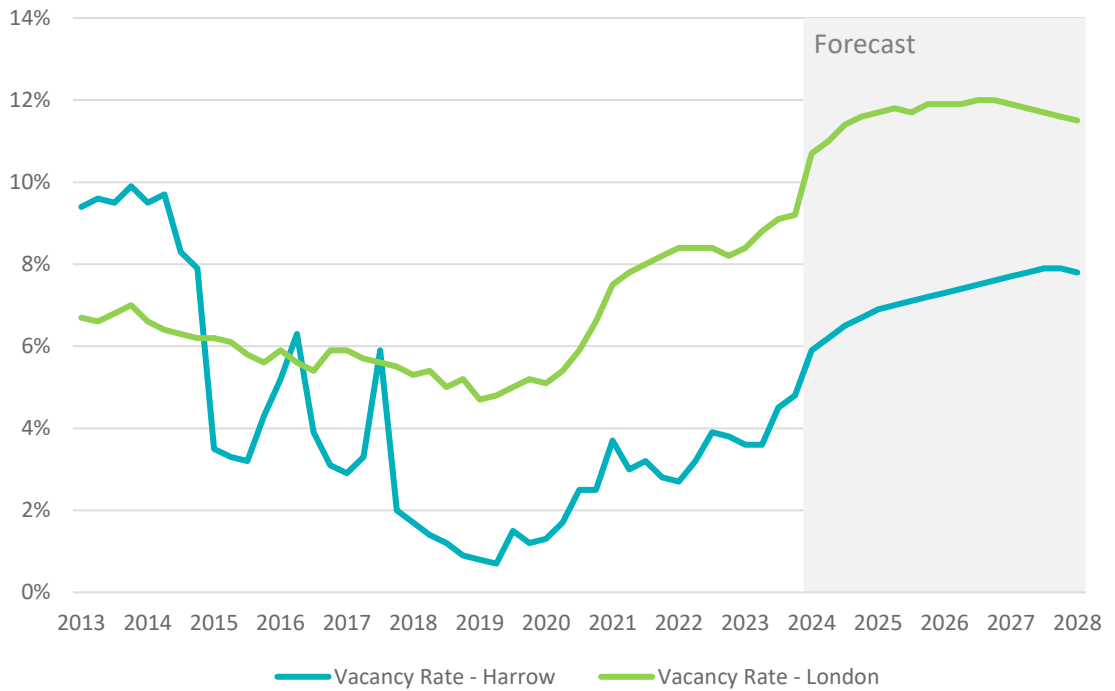
	Harrow Office Supply (sqm)
Available supply	22,406
10-year average annual take-up (2013-2022)	21,403
Implied years of available supply from 10-year average	1.05
5-year average annual take-up (2018-2022)	13,912
Implied years of available supply from 5-year average	1.61

Source: CoStar (October 2023) | Lichfields Analysis

Vacancy rates

3.18 Figure 3.3 shows office vacancy rates in LB Harrow since 2013, and a forecast of vacancy rates up to 2028. After peaking at 9.9% in 2013, vacancy rates fell to 1.2% in 2019, before increasing again since the Covid-19 pandemic in 2020; this is likely attributable to changing patterns of work and an increased incidence of home-based and remote working patterns.

Figure 3.3 Vacancy rates in Harrow Borough and London office markets, 2013-2023



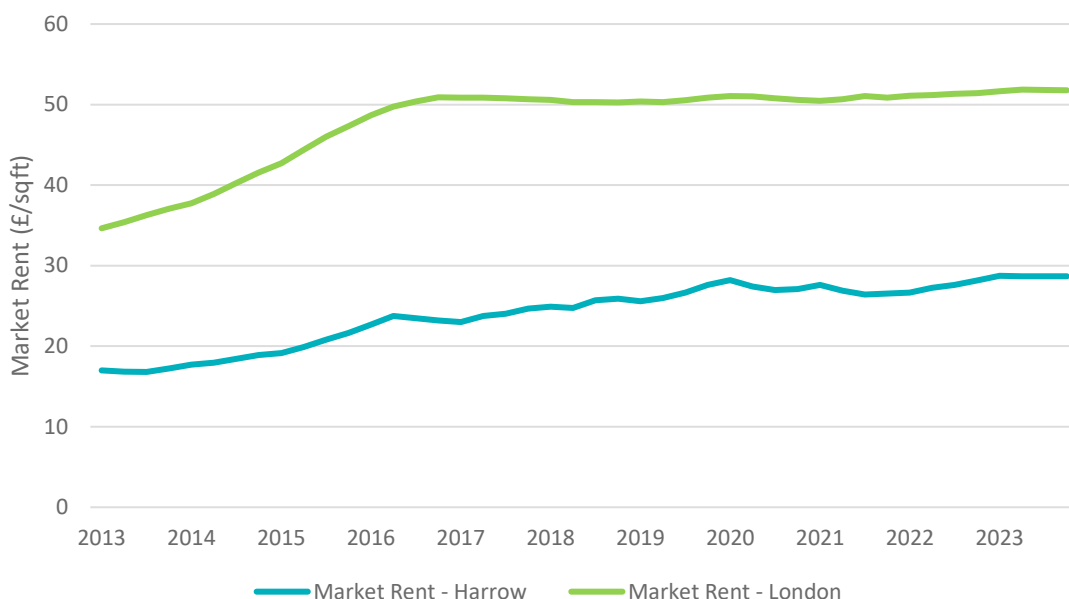
Source: CoStar (October 2023)

3.19 Vacancy rates within the London office market more widely have been significantly higher than within Harrow in the past five years; most recently, the latest available data estimates vacancy within London to be at 9.2%, compared to 4.8% within LB Harrow. The lower vacancy observed in LB Harrow is likely a result of a significant and sustained reduction in local office stock while demand has remained broadly constant, rather than indicating higher demand relative to the London average.

Market rent

3.20 Current market rents for office space in LB Harrow (£28.68 per square foot) are significantly below the London average (£51.76 per square foot), reflecting differences in the overall quality of the office stock and lower levels of demand in Harrow compared to elsewhere in the capital. Rents have remained broadly stable since 2019, despite the cost-push inflation experienced across the economy in recent months; this trend is also mirrored within London as a whole.

Figure 3.4 Market rents per square foot in Harrow Borough and London, 2013-2023



Source: CoStar (October 2023)

Stock Age

3.21 Table 3.2 below presents a summary of the age of the office stock across the Borough. Almost half of LB Harrow’s office floorspace was constructed between 1980 and 1999, while a further 23.7% dates from before 1980. Just 10.5% of the total office floorspace in Harrow is within buildings constructed in the last two decades.

Table 3.2 Age of office stock in Harrow Borough (October 2023)

Market	Date built	Floorspace (sqm)	Proportion of total floorspace	Number of premises	Proportion of premises
LB Harrow	Pre-1940	28,281	10.6%	54	18.7%
	1940-1979	83,649	23.1%	69	22.9%
	1980-1999	128,126	46.2%	77	26.1%
	2000-present	27,822	10.5%	30	10.6%
	Unknown	25,478	9.6%	52	21.8%
	Total		265,556		274

Source: CoStar (October 2023) | Lichfields analysis

Quality

3.22 Table 3.3 summarises the CoStar quality rating⁵ of the office stock across LB Harrow and London as a whole. Just six properties (2.2%) were rated 4 or 5 stars in terms of quality, equivalent to 19,185 sq.m, or 7.2%, of office floorspace. This is a significantly lower

⁵ Further detail on the CoStar rating classifications is available at: <https://www.costar.co.uk/docs/librariesprovider5/knowledge-centre-documnets/ratingsytem.pdf>

proportion of total floorspace than that observed within the London region, where 57.2% of office floorspace is rated 4 or 5 stars.

Table 3.3 Quality of office stock across Harrow Borough and London (2023 Q3)

Market	CoStar Rating	Floorspace (sqm)	Proportion of total floorspace	Number of premises	Proportion of premises
LB Harrow	1-2 Stars	54,984	20.7%	122	44.9%
	3 Stars	186,477	70.3%	144	52.9%
	4-5 Stars	19,185	7.2%	6	2.2%
	Total	265,445		272	
London	1-2 Stars	2,861,186	7.1%	7,981	35.3%
	3 Stars	14,707,497	36.3%	11,785	52.1%
	4-5 Stars	23,155,427	57.2%	2,856	12.6%
	Total	40,510,853		22,622	

Source: CoStar (October 2023)

Note: this data is based on a different dataset from Table 2.2 and therefore the total stock figure varies slightly

Summary

- 3.23 The office market has experience significant, and potentially structural, change since the 2017 EDNS was produced. Within LB Harrow, demand for office space has continued to decline, posting well below average take-up figures in 2022 and in 2023 to date.
- 3.24 Against this backdrop, the office stock in LB Harrow is ageing and is comprised of a higher proportion of low-quality premises and floorspace than the London average. This has suppressed market rents to below £30 per square foot, compared to a London average rent of more than £50 per square foot.
- 3.25 However, reductions in supply through conversions, as highlighted in the following section, have kept vacancy rates in the Borough low over the past five years. The Borough’s office vacancy rate is now nearly half the London average.

4.0 Retail and food/beverage capacity

Introduction

- 4.1 This section assesses the quantitative and qualitative need for retail and food/beverage uses within LB Harrow. The National Planning Policy Framework (NPPF) indicates that local planning authorities should positively seek opportunities to meet the development needs of their area, and Local Plans should meet objectively assessed needs. It sets out the methodology adopted for this analysis and provides a quantitative capacity analysis in terms of levels of spending for convenience and comparison shopping and food/beverage (eating and drinking away from the home).

Assumptions and base data

- 4.2 All monetary values expressed in this study are at 2021 prices, consistent with Experian's base year expenditure figures for 2021, which are based on actual recorded expenditure levels rather than projections.

Study area zones

- 4.3 A household telephone survey was undertaken during September 2023. The primary catchment areas of some centres will extend beyond the Borough boundary to the south and west e.g. the primary catchment area of Harrow town centre will extend to the south and west. The study area is shown in Appendix 1. This study area has been sub-divided into 8 zones based on ward areas to reflect the primary catchment areas of the main centres in the Borough.
- 4.4 The projected population within each zone between 2021 to 2040 is set out in Table 1 in Appendix 3, based on the GLA's 2021 10-year supply – constrained ward level based projections for Zones 1 to 5, within LB Harrow. Population projections in other zones are based on Experian's latest 2021-based small area population estimates and projections.
- 4.5 The base year 2023 population within the Harrow study area is 439,865 (Note – the study area extends beyond LB Harrow's administrative area). This population is projected to increase to 468,181 by 2041, an increase of +6.4%.

Retail expenditure

- 4.6 The level of available expenditure to support retailers is based on first establishing per capita levels of spending for the study area population. Experian's local consumer expenditure estimates for comparison and convenience goods for each of the study area zones for the year 2021 have been obtained.
- 4.7 Experian's latest EBS national expenditure information (Experian Retail Planner Briefing Note 20 – February 2023) has been used to forecast expenditure within the Harrow study area. Experian's short term EBS growth forecast rates during 2022, 2023 and 2024 reflect current economic circumstances, including Covid-19 and the cost of living crisis. The forecast changes during this period are as follows:
- convenience goods: -9.3%;
 - comparison goods: -1.7%;

- leisure: +21.1%.

4.8 These short-term forecasts reflect post Covid lockdown re-adjustments during 2022. Convenience goods expenditure increased during the lockdowns with households eating out less often than before the pandemic. Convenience goods expenditure is forecast to decline during 2022, 2023 and 2024. Comparison goods and leisure expenditure, including eating and drinking out, reduced significantly during the lockdowns. The leisure sector was projected to recover during 2022. The comparison good retail sector is expected to decline during 2022 and 2023.

4.9 In the longer term it is more difficult to forecast year on year changes in expenditure. Experian's medium and long-term growth average forecasts have been adopted, as follows:

- convenience goods: +0.1% per annum growth for 2025 to 2029 and 0.2% per annum beyond 2029;
- comparison goods: +2.5% per annum growth for 2025 to 2029 and +3% per annum beyond 2029; and
- leisure: +1% per annum growth for 2025 to 2029 and +0.9% per annum after 2029.

4.10 These growth figures relate to real growth and exclude inflation.

4.11 Experian provides projections for special forms of trading (SFT) which includes home and online shopping through non-retail businesses. This SFT expenditure is excluded from the retail capacity projections. Experian's latest adjusted deductions for SFT in 2023 are:

- 5.8% of convenience goods expenditure; and
- 28.7% of comparison goods expenditure.

4.12 Experian's projections suggest that these percentages will increase to 7.8% and 32.3% by 2041, respectively.

4.13 Table 2 in Appendix 3 sets out the updated forecasts for spending per head on convenience goods within each zone in the study area up to 2041, excluding SFT. Average convenience goods expenditure is expected to reduce due to a higher proportional increase in SFT. Forecasts for comparison goods spending per capita are shown in Table 2 in Appendix 4 and food/beverage expenditure is shown in Table 2 in Appendix 5.

4.14 Based on forecast changes in population and per capita spending (excluding SFT), total convenience goods spending within the Harrow study area is forecast to increase by +6.4% from £922 million in 2023 to £981 million in 2041, as shown in Table 3 (Appendix 3).

4.15 Comparison goods spending is forecast to increase by +58.5% between 2023 and 2040, increasing from £1,025 million in 2023 to £1,625 million in 2041, as shown in Table 3 (Appendix 4).

4.16 Food and beverage spending is forecast to increase by +19.5% between 2023 and 2041, increasing from £780 million in 2023 to £973 million in 2041, as shown in Table 3 (Appendix 5).

Growth in Turnover densities

- 4.17 Experian's Retail Planner Briefing Note 20 - February 2023 indicates comparison goods retail sales floorspace is expected to reduce its average sales density by -0.4% during 2024, but will grow in the medium term (+2% per annum during 2025 to 2029), and longer term (+2.8% per annum beyond 2029). These forecast increases have been adopted and will absorb much of the future expenditure growth. These growth rates are relatively high compared with historic forecasts but are consistent with the likely high increase in on-line/home shopping through retail businesses i.e. the total sales of retail businesses will increase at a much higher rate than the amount of physical sales floorspace they provide.
- 4.18 For convenience goods retail, Experian indicates a 2.8% increase in sales densities during 2024; a small average increase of 0.1% per annum during 2025 to 2029; and no predicted growth in sales densities thereafter.
- 4.19 For leisure facilities, including food/beverage floorspace, Experian indicates a -0.7% decline in sales densities during 2024; a small average increase of 0.4% per annum during 2025 to 2029; and 0.2% growth per annum in sales densities thereafter.

Base year market shares

- 4.20 The turnover of facilities within LB Harrow is estimated based on the market shares or penetration rates. To assess the capacity for new floorspace, penetration rates have been estimated for shopping and food/beverage facilities based on a household shopper survey undertaken in September 2023.
- 4.21 The market shares for convenience goods and comparison goods shopping are shown in Table 4 in Appendix 3 and Table 4 in Appendix 4, respectively. The market shares for food and beverage expenditure are shown in Table 4 in Appendix 5.
- 4.22 The results of the household shopper survey regarding main and top-up food and grocery shopping have been used to estimate existing convenience goods shopping patterns, as summarised in Table 4.1. The more detailed market shares in Table 4 in Appendix 3 are a combined rate for both main and top up shopping based on a 70:30 split. This 70:30 split is based on Lichfields' experience and is widely accepted in retail studies of this kind.

Table 4.1 Food and grocery trip retention in the Harrow study area (% of all trips in each zone)

Zone	Main last trip	Main other trip	Top-up	Combined market share
1 – Central Harrow	86.7	83.5	94.9	88.5
2 – Harrow Southwest	50.4	51.9	77.4	58.9
3 – Harrow Northwest	89.8	89.7	90.4	90.0
4 – Harrow Northeast	70.0	57.8	82.4	71.3
5 – Harrow Southeast	37.1	39.8	58.1	44.5
6 – Brent North	22.3	24.8	14.5	21.1
7 – Ealing North	24.7	22.0	27.8	25.2
8 – Hillingdon Northeast	28.1	32.4	10.4	23.7

Source: NEMS household survey results September 2023

- 4.23 LB Harrow's retention of convenience goods shopping trips is high within the central and northwest parts of the Borough (Zones 1 and 4). The Borough's market shares are much

lower in the three zones that lie outside the authority area i.e. Zone 6 (Brent North), Zone 7 (Ealing North) and Zone 8 (Hillingdon Northeast due to the draw of food stores within these zones. Expenditure leakage from zones within LB Harrow is highest (55.5%) from Zone 5 (Harrow Southeast) primarily due to outflow to large food stores in LB Barnet and LB Brent

4.24 These figures indicate that most residents undertake their food and grocery shopping close to where they live albeit predominantly by car for main food shopping trips. The household survey results and distribution of food stores within and surrounding the study area suggest there is limited potential for LB Harrow to increase its market share of convenience goods expenditure in the future, but the potential for further convenience goods retail floorspace could arise in areas of high population growth.

4.25 The market shares for comparison goods shopping in Table 4, Appendix 4 are based on a weighted average for each comparison goods category included within the household survey e.g. clothing/footwear, electrical, furniture, floorcoverings, DIY and health and beauty products. The survey results suggest lower levels of comparison goods expenditure retention for all goods categories within most study area zones, as shown in Table 4.2. The retention rates are particularly low for bulky comparison goods including electrical, furniture and DIY goods, probably due to the outflow of expenditure to retail warehouse parks in neighbouring Boroughs.

Table 4.2 Non-food comparison trip retention (% of all trips in study area zones – excluding internet shopping)

Zone	Clothing footwear	Domestic electrical	Other electrical	Furniture floor-covering textile	DIY hardware garden	Health beauty	Books stationery	Toys hobbies pets	Other non-food	Combined weighted Market share
1 – Central Harrow	51.0	29.9	18.5	18.4	24.8	72.6	67.4	38.1	44.8	44.9
2 – Harrow Southwest	54.4	8.6	13.2	13.8	20.2	54.2	57.3	34.8	35.0	38.0
3 – Harrow Northwest	39.5	24.2	15.5	22.0	35.6	82.1	73.1	32.0	44.8	41.0
4 – Harrow Northeast	35.4	21.3	5.0	14.7	25.6	60.8	46.5	18.9	18.1	32.1
5 – Harrow Southeast	43.8	4.8	0.0	8.4	15.8	33.1	41.4	25.3	26.2	33.2
6 – Brent North	17.1	13.1	9.8	8.4	9.7	19.7	43.1	17.9	20.7	22.0
7 – Ealing North	22.7	10.3	11.7	11.8	9.5	24.5	44.8	24.2	23.2	20.5
8 – Hillingdon Northeast	24.6	1.3	1.3	8.6	7.5	10.0	27.8	12.6	4.4	12.3

Source: NEMS household survey results September 2023

4.26 The results of the household shopper survey regarding eating and drinking away from the home have been used to estimate existing food and beverage expenditure patterns. The market shares in Table 4 in Appendix 5 are a combined rate for both eating out and drinking at pubs/bars are based on an 80:20 split, based on Experian’s local expenditure data. The survey results suggest reasonably high levels of expenditure retention within the study area, as shown in Table 4.3.

4.27 The survey results suggest lower levels of food/beverage expenditure retention rate than for convenience goods shopping but higher levels of retention than comparison goods shopping.

Table 4.3 Food and beverage trip retention (% of all trips in study area zones)

Zone	Eating out	Drinking away from home	Combined market weighed share
1 – Central Harrow	60.1	73.0	64.1
2 – Harrow Southwest	55.5	50.8	55.3
3 – Harrow Northwest	54.9	59.1	55.6
4 – Harrow Northeast	53.5	60.5	58.9
5 – Harrow Southeast	39.0	51.4	52.2
6 – Brent North	29.1	16.4	33.1
7 – Ealing North	22.7	22.5	22.6
8 – Hillingdon Northeast	22.6	13.4	20.7

Source: NEMS household survey results February 2023

Capacity for convenience goods retail floorspace

4.28 Based on the market shares calculated from the February 2023 household survey results, available convenience goods expenditure attracted to LB in 2023 is shown in Table 4 in Appendix 3. This expenditure has been projected forward to 2026, 2031, 2036 and 2041, and is summarised in Table 11 in Appendix 3. Convenience goods expenditure available to facilities within LB Harrow is expected to increase from £529 million in 2023 to £575 million in 2041. This increase is due to population growth, which offsets the slight reduction in average expenditure per person (excluding SFT). A breakdown for facilities in each zone is set out in Table 4.4.

Table 4.4 Convenience goods base year turnover in 2023 (household survey based turnover)

Zone	Turnover £M
1 – Central Harrow	123.16
2 – Harrow Southwest	96.87
3 – Harrow Northwest	147.05
4 – Harrow Northeast	107.90
5 – Harrow Southeast	54.18
All LB Harrow Zones	529.16

Source: Table 11 in Appendix 3. NB. no figures for Zones 6, 7 and 8, which fall outside LB Harrow.

4.29 The benchmark turnover of food stores and convenience shops within LB Harrow is calculated in Table 10 in Appendix 3. The benchmark turnover is based on the sales area within each store and the respective company average sales densities. This turnover is not necessarily the actual turnover of the store, but it provides a useful benchmark to assess how well existing facilities are trading.

4.30 The combined benchmark turnover of identified food stores and other convenience goods shops within LB Harrow is estimated to be about £539 million as shown in Table 10 in Appendix 3. Convenience goods shopping facilities within LB Harrow are estimated to be trading just below average. However, there are variations across the Borough with

convenience goods retail facilities trading particularly well in the northeast of the Borough. The household survey results suggest convenience goods retail facilities in Harrow Central (Zone 1) are trading about 12% below benchmark.

4.31 Table 11 in Appendix 3 subtracts the benchmark turnover of existing floorspace from available expenditure to calculate the amount of surplus/deficit expenditure that may be available for new development in the future.

4.32 The figures shown in Table 11 indicate there is a projected convenience goods expenditure deficit of -£9.32 million in 2023, due to under-trading in Zones 1 (Harrow Central) and Zone 5 (Harrow Southeast), which offsets over-trading in other zones. This expenditure deficit is projected to increase to -£21.69 million at 2026 because population and expenditure growth will be offset by an increase in home shopping (SFT) and increases in sales densities. Continued population growth reduces the deficit to -£7 million in 2031 and there is a small surplus of +£4.06 million in 2036, increasing to +£17.95 million in 2041. These projections suggest there is limited capacity for additional convenience goods facilities in the Borough in the short to medium term up to 2036.

4.33 The deficit/surplus expenditure projections are converted into floorspace estimates in Table 12 in Appendix 3 based on a combined company average sales density of £12,000 per sq.m net of the main food store operators. The results are summarised in Table 4.5.

Table 4.5 Convenience goods floorspace capacity (sq.m gross) - cumulative

Zone	2026	2031	2036	2041
1 – Central Harrow	-2,087	-2,015	-785	-332
2 – Harrow Southwest	-182	-529	-474	-311
3 – Harrow Northwest	823	383	611	914
4 – Harrow Northeast	1,926	1,577	1,868	2,129
5 – Harrow Southeast	-1,661	-1,923	-2,027	-1,931
Total	-1,181	-2,507	-807	468

Source: Table 12 in Appendix 3.

4.34 The deficit expenditure projections imply a small combined over-supply of convenience goods floorspace in LB Harrow of 807 sq.m gross in 2036. There is a small combined under-supply of 468 sq.m gross in 2041.

Capacity for comparison goods floorspace

4.35 Available comparison goods expenditure has been projected to 2026, 2031, 2036 and 2041 and is summarised in Table 11 in Appendix 4. Comparison goods expenditure available to facilities in LB Harrow is expected to increase from £356 million in 2023 to £547 million by 2041.

4.36 Table 11 in Appendix 5 subtracts the turnover of existing floorspace including an allowance for growth in turnover densities. The projections suggest future growth in available expenditure will be partially offset by expected growth in turnover densities i.e. existing retail businesses will absorb expenditure growth. This assumption is consistent with Experian's projected growth in non-store sales taken by retail businesses. The growth in retail operator's turnover densities will in part be fuelled by on-line sales and click and collect (from stores or collection points), which will not directly affect the need for

additional retail sales floorspace. The deductions already made for SFT only relate to non-store sales through non-retail businesses.

- 4.37 By 2031 there is a projected expenditure surplus of +£2.31 million, but there is a small deficit of -£0.77 million in 2036. By 2041 there is a small surplus of +£1.49 million. These projections suggest growth in turnover densities will absorb future expenditure growth. The expenditure projections have been converted into floorspace estimates Table 12 in Appendix 4. The results are summarised in Table 4.6.
- 4.38 The deficit expenditure projection to 2036 implies a combined small over-supply of comparison goods floorspace in LB Harrow of -128 sq.m gross. There is a small under-supply of +216 sq.m gross in 2041.

Table 4.6 Comparison goods floorspace capacity (sq.m gross) - cumulative

Zone	2026	2031	2036	2041
1 – Central Harrow	365	1,368	1,664	2,428
2 – Harrow Southwest	45	106	-52	-132
3 – Harrow Northwest	-98	-409	-707	-821
4 – Harrow Northeast	-126	-438	-779	-1,021
5 – Harrow Southeast	-62	-186	-254	-239
Total	124	442	-128	216

Source: Table 11 in Appendix 4.

Capacity for food/beverage floorspace

- 4.39 Available food and beverage expenditure has been projected forward to 2026, 2031, 2036 and 2041, and is summarised in Table 11 in Appendix 5. The amount of expenditure attracted to LB Harrow is expected to increase from £394 million in 2023 to £490 million in 2041. Food/beverage provision in LB Harrow is set out in Table 10 in Appendix 4.
- 4.40 Table 11 in Appendix 5 subtracts the turnover of existing floorspace from available expenditure to calculate the amount of surplus expenditure available for new development. In 2031 there is an expenditure surplus of +£37.86 million. Continued population and expenditure growth creates an expenditure surplus of £58.30 million in 2036 increasing to £81.68 million by 2041. Floorspace capacity projections are shown in Table 12 in Appendix 5 and summarised in Table 4.7 below.

Table 4.7 Food and beverage floorspace capacity (sq.m gross) - cumulative

Zone	2026	2031	2036	2041
1 – Central Harrow	984	2,902	4,156	5,470
2 – Harrow Southwest	204	484	832	1,270
3 – Harrow Northwest	631	1,676	2,596	3,650
4 – Harrow Northeast	332	899	1,437	2,063
5 – Harrow Southeast	97	244	439	667
Total	2,248	6,205	9,458	13,119

Source: Table 11 in Appendix 5.

Operator space requirements

4.41 The Requirement List publishes potential space requirements for multiple retail and food/beverage operators. The current (October 2023) list of operators whose published information suggest they may have space requirements in LB Harrow are shown in Tables 4.8 to 4.10.

4.42 In total, there are 33 retail and food/beverage operators listed as having potential space requirements in the Borough with a potential total floorspace requirement of at least 213,300 sq.ft gross (or 19,800 sq.m), as follows:

- Convenience goods retailers 9 (over 32,700 sq.ft gross)
- Comparison goods retailers 10 (over 51,300 sq.ft gross)
- Food/beverage operators 14 (over 17,600 sq.ft gross)

4.43 Many operators (such as Lidl, The Range, Topps Tiles, Pets at Home, Savers, Scope, British Heart Foundation) have space requirements listed for more than one centre in the Borough, which indicates their requirement may relate to a general area of search rather than a specific town centre. In most cases it is unlikely more than one outlet is required in the Borough.

Table 4.8 Convenience goods retail operator space requirements in LB Harrow

Operator	Floorspace sq.ft min/max	Area of search
CakeCo – bakery	650 – 1,500	Harrow
Co-op - convenience store	1,000 - 5,000	Harrow
Gail's Bakery	1,400 – 4000	Pinner
Grape Tree - health food	1,250	Harrow
Heavenly Desserts	1,500 - 2,000	Harrow
Kona - Asian patisserie	400 - 2,000	Harrow
Lidl supermarket	18,000 - 26,000	Harrow/Wealdstone/Queensbury
M&S Food	6,000 - 25,000	Stanmore
Majestic Wine	2,500 - 5,000	Pinner

Source: The Requirements List (October 2023)

Table 4.9 Comparison goods retail operator space requirements in LB Harrow

Operator	Floorspace sq.ft min/max	Area of search
All Aboard - charity shop	5,000 – 8,000	Harrow
British Heart Foundation - charity	1,500 - 14,000	Harrow / Wealdstone
i Handi - phone/computer repair	800 – 1,500	Hatch End
Pets @ Home	5,000 - 10,000	Harrow/Pinner/Stanmore/Wealdstone
Poundstretcher - value store	6,000 - 30,000	Harrow
Savers - health & beauty	2,000 - 3,500	Harrow/North Harrow/Pinner/Rayners Lane/Wealdstone
Scope - charity shop	1,500 - 2,000	Harrow/Hatch End
The Range – home/garden/leisure	25,000 - 40,000	Harrow/Stanmore/Wealdstone
Tile Giant	2,000 – 10,000	Harrow
Topps Tiles	2,500 - 8,000	Harrow/Hatch End/Stanmore

Source: The Requirements List (October 2023)

Table 4.10 Food/beverage operator space requirements in LB Harrow

Operator	Floorspace sq.ft min/max	Area of search
Chicken Cottage - fried chicken	800 - 2,000	Harrow
Chilli Flames - fast food	1,000 - 1,750	Harrow
Creams Café - ice creams & Waffles	1,400 - 2,000	Harrow
Donershack - German street food	2,750 - 4,000	Harrow
GDK - burger restaurant	1,300 - 2,500	Harrow
Innkeeper's Lodge pub/restaurant/hotel	NK	Harrow
Itsu (Auspicio) - sushi restaurant	1,500 - 3,000	Harrow
KFC - fast food restaurant	1,200 - 2,500	Harrow
London Yard Pizza – delivery/dine-in	700 – 1,200	Harrow/Queensbury
Mainland China - Chinese restaurant	1,500 - 3,000	Harrow/Pinner/Stanmore
Popeyes - chicken restaurant	1,500 - 4,000	Harrow
Premium Country Pubs	NK	Harrow
Square Bubbles - bubble tea	500 – 800	Harrow
Vapiano - Euro-restaurant	3,500 - 12,000	Harrow

Source: The Requirements List (October 2023)

- 4.44 Furthermore, some of these listed requirements are likely to be generic interest in centres of a similar size across the region rather than specifically in the Borough, therefore the total number of requirements and amount of floorspace outlined above should be treated with caution.
- 4.45 There appears to be a reasonable interest from the discount retail (including bargain supermarkets), charity shop and fast food sectors. There are currently no active requirements from either retailers or food/beverage operators for Burnt Oak, Belmont and Harrow Weald.

5.0 **Leisure, entertainment and cultural uses**

Introduction

5.1 This section assesses the need for other main town centre uses including commercial leisure, entertainment and cultural uses i.e. cinema/multiplex, tenpin bowling, bingo, theatres, nightclubs and private health and fitness clubs. Main town centre uses, as defined within the NPPF glossary, excludes less intensive sports and recreation uses such as swimming pools, sports halls and sports pitches, and therefore the need for these uses has not been assessed in this study.

5.2 Residents in LB Harrow have a relatively good range of commercial leisure and entertainment uses within the authority area and within neighbouring boroughs. Public transport access to facilities within Central London also provides additional opportunities for leisure, entertainment and cultural trips.

Leisure, entertainment and cultural expenditure

5.3 Experian's projections and local expenditure data for the Harrow study area indicates the resident population generates £187.83 million in 2023 (an average of about £427 person) on selected cultural, recreational and sporting services, including:

- cinema admissions;
- live entertainment i.e. theatre/concerts/shows;
- museums, theme parks, houses and gardens;
- admissions to clubs, dances, discos, bingo;
- other miscellaneous entertainment;
- subscriptions to sports and social clubs; and
- leisure class fees.

5.4 Leisure, entertainment and cultural expenditure has been projected to 2031, 2036 and 2041 adopting Experian's recommended leisure expenditure growth rates (Retail Planning Briefing Note 20 – February 2023). Taking population growth into account leisure expenditure is projected to increase by 24.3% from £187.83 million in 2023 to £233.44 million in 2041.

5.5 Not all leisure/cultural spend from study area residents is spent in LB Harrow. The household survey results have been adopted to estimate the household participation rates and the retention of leisure trips within the study area, as shown in Table 5.1. Less than 11% of households do not participate in any of the nine leisure activities explored by the household survey.

5.6 The participation and retention rates vary significantly for each activity. Many residents travel outside the study area e.g. to Central London for some leisure activities. The retention rate is highest for trips to health/fitness but much lower for museums/art galleries and nightclubs/live music venues. These results suggest LB Harrow residents are prepared to travel further for museum/art gallery and nightclub/live music venue activities.

Facilities in London attract a high proportion of museum/art gallery (57%) and nightclub/live music venue trips (47%).

Table 5.1 Leisure, entertainment and cultural participation and trip retention (% of households in the study area)

Activity	% households participating	% trips attracted to LB Harrow
Cinema	61.0	47.9
Theatre	39.8	4.6
Nightclubs / live music venues	14.3	7.3
Bingo	3.6	33.8
Gyms / health and fitness club	26.4	46.6
Tenpin bowling / gaming	17.2	1.9
Indoor / soft play	13.9	29.3
Trampoline parks	11.3	6.0
Museums / art galleries	38.2	3.3

Source: NEMS household survey results August 2023

- 5.7 The household survey results and Experian's expenditure figures suggest facilities in LB Harrow attract not more than 40% of leisure, entertainment and cultural expenditure within the study area, which is about £75.1 million in 2023, which is projected to increase to £83.0 million in 2031, £87.9 million in 2036 and £93.4 million in 2041.
- 5.8 Based on Lichfields' experience, leisure floorspace normally trades on average around £2,500 per sq.m gross, which is projected to increase to £2,543 per sq.m gross in 2031; £2,568 per sq.m gross in 2036 and then to £2,594 per sq.m in 2041, based on Experian's projected growth in leisure sales densities.
- 5.9 If leisure/cultural expenditure attracted to LB Harrow Borough increased by £7.9 million by 2031; £12.8 million by 2036 and then £18.3 million in 2041, as indicated above, then this additional expenditure could support about 3,100 sq.m gross of new commercial leisure and cultural floorspace by 2031, increasing to about 5,000 sq.m gross by 2036 and then to 7,000 sq.m gross by 2041.
- 5.10 This analysis provides a broad brush global floorspace capacity analysis. A more detailed sector by sector assessment is set out in the remainder of this section.

Cinemas

- 5.11 Cinema admissions in the UK reached a peak of 1.6 billion trips in 1946, but the number of trips declined steadily during the 1950s, 1960s and 1970s, a period when the ownership of televisions increased significantly. Cinema admissions continued to decline in the early 1980s dropping to only 54 million trips in 1984 but increased steadily after 1984 up to 2002. There was a peak in cinema admissions in 2002 at 175.9 million. Total admissions reduced to 157.5 million in 2014 but increased slowly to 176 million in 2019 (Source: British Film Institute). Cinema trips did not increase significantly between 2002 and 2019, despite population growth of 9.6% during this period (59.4 million to 66.6 million). The national average visitation rate was about 2.6 trips per person per annum, before the Covid crisis. The number of trips during the Covid-19 crisis reduced significantly. The latest 2022 figures indicate just over 117 million cinema trips were made in the UK (about 1.7 trips per person), still 33% below pre-Covid levels (176 million).

- 5.12 The cinema assessment for LB Harrow assumes trip levels comparable with the UK average at both post and pre-Covid levels, i.e. an average of between 1.7 and 2.6 trips per person per annum.
- 5.13 The UK Film Association identifies 846 cinema facilities with 4,637 screens and 790,000 seats in the UK in 2022. Lichfields' national CINESCOPE model assesses the provision of cinema screens/seats against projected customer cinema trips across the country, to identify areas of under and over-provision. The national average (based on pre-Covid trips rates) was about 38,000 cinema trips per annum for each cinema screen or 190 trips per annum for each seat available.
- 5.14 The Harrow study area is 439,865 in 2023, which based on the national averages above, would generate between 0.75 to 1.14 million cinema trips, which could theoretically support between 19 to 30 cinema screens or 3,950 to 6,000 cinema seats. However, not all cinema trips will be attracted to facilities in LB Harrow. Cinemas surrounding the Borough attract a significant number of trips, therefore the theoretical capacity will be much lower.
- 5.15 Based on the current cinema market share for LB Harrow (47.9%) suggested by the household survey results, between 9 to 14 screens or 1,900 to 2,900 cinema seats could be supported based on the UK pre and post Covid average visitation rate (1.7 or 2.6 trips per person).
- 5.16 LB Harrow has one full-time cinema, Vue at St. George's Leisure Centre, Harrow with – 12 screens (1,704 seats). This provision and the base year trip estimates suggest there is a reasonable balance between supply (screen/seats) when compared with demand (trips), based on the lower post Covid visitation rates. If approved and implemented, proposals to renovate and reopen the Safari Cinema in Harrow would further reduce the scope for new cinema provision in the Borough.
- 5.17 Population within the Harrow study area is projected to increase from 439,865 to 468,181 by 2041, which could generate an additional 48,000 to 74,000 cinema trips. These additional trips could in theory support up two cinema screens or 389 seats.
- 5.18 Existing cinema provision in surrounding Boroughs may limit operator demand for a new facility within the study area. Furthermore, the longer-term impact of Covid-19 on the number of cinema trips may reduce this theoretical capacity if the average visitation rate does not return to the UK average of 2.6 trips per person.

Theatres, nightclubs, live music and cultural activities

- 5.19 The household survey results indicate a relatively low proportion (less than 40%) of respondents in the study area visit theatres. Just over 38% visit museums/art galleries and only 14% visit nightclubs/live music venues.
- 5.20 The UK Theatre and Society of London Theatres (SOLT) indicated their member organisations (over 200) pre-Covid presented nearly 63,000 performances attracting over 34.35 million tickets visits, generating ticket revenue of £1.28 billion in 2018. The average ticket revenue per venue was £5.7 million. The UK average attendance per performance was 545.

- 5.21 Experian's local expenditure data indicates the Harrow study area generated £33.3 million on live theatre, concerts and shows in 2023, which is projected to increase to £41.4 million in 2041. Based on the average ticket revenue per venue (£5.7 million) the Harrow study area population currently generates theoretical demand for 5 to 6 venues. This theoretical demand could increase to 7 venues in 2041. However, the household survey results suggests LB Harrow attracts less than 5% of theatre trips. The Arc House is the main theatre venue in the Borough. About 75% of participating households visit theatres in Central London/the West End.
- 5.22 LB Harrow's existing provision is above the theoretical demand generated by the study area, based on the current market share of less than 5%. Based on existing provision and high levels of access to theatres in Central London.
- 5.23 The nightclub sector has struggled in recent years and has been significantly affected by the Covid pandemic. Even before Covid-19, IBISWorld (providers of global industry research) suggested these venues have lost their competitive advantage over pubs or bars, with lower prices and a more relaxed atmosphere. Approximately one-quarter of nightclubs have closed in the past decade as operators have struggled to respond to new challenges from regulation, licensing, planning, business rates and policing.
- 5.24 The household survey results suggest only 14% of households visit nightclubs/music venues and of these participating households only 7% of trips generated by the study area are attracted to facilities in LB Harrow. About 29% of participating households are attracted to facilities in Central London. This is a national trend that reflects the UK's aging population.
- 5.25 Experian suggests leisure expenditure on admissions to clubs, dances, discos etc was only £3.4 million in 2021 within the Harrow study area, which should have recovered to £4.25 million in 2023. Expenditure attracted to LB Harrow is only £0.3 million. This low level of expenditure and access to nightclub/live music venues in Central London are likely to limit demand for additional facilities in LB Harrow.
- 5.26 Experian's local expenditure data indicates the Harrow study area generated £29.3 million on museums, theme parks, houses and gardens in 2021 which should have recovered to about £36.2 million in 2023, which is projected to increase to £45 million in 2041, an additional £8.8 million.
- 5.27 The household survey results suggest 38% of households visit museums/ art galleries, but of these participating households only 3.3% of trips generated by the study area are attracted to LB Harrow. Most participating households are attracted to facilities in Central London. LB Harrow's potential share of expenditure growth between 2023 and 2041 would be only £0.3 million, based on the current market share (3.3%). However, a modest increase in market share could support small scale facilities. The main destinations in LB Harrow specifically mentioned by respondents in the household survey were as follows:
- Headstone Manor and Museum, Pinner View, Harrow;
 - Whitefriars Gallery, Winsor and Newton Building, Harrow;
 - War Memorial Building and Old Speech Room Gallery, Harrow School;
 - Heath Robinson Museum, Pinner;
 - The Gallery, Harrow Arts Centre, Hatch End

- Bentley Priory Museum, Stanmore.

5.28 The analysis above suggests there is no clear qualitative or quantitative need for additional theatre, music/nightclub or cultural provision. However, there may be potential to increase LB Harrow’s low market share and attract more demand from tourist visitors if provision is improved.

Health and fitness clubs

5.29 The 2019 State of the UK Fitness Industry Report revealed that the health and fitness industry was continuing to grow pre-Covid. The latest 2022 report suggests the market value is now around 2018 levels. In 2019 there were more than 10.4 million fitness members in the UK and the industry was worth £5 billion, with a participation rate of 15.6%. The number of members dropped to 9.9 million in 2022, with a participation rate of 14.6% compared with 15.6% in 2019. The number of clubs reduced by 176. The household survey results indicate over 26% of households visit health and fitness gyms, which is higher than the national average participation rate of less than 15%.

5.30 The Sport England/Active Places data indicates that there are 23 registered health and fitness facilities in LB Harrow, with 1,752 fitness stations. The distribution of facilities and population is summarised in Table 5.2.

Table 5.2 Health and fitness facilities in LB Harrow

Facility	No. of fitness stations	Type of access
The Gym Group, Wealdstone	219	Registered Membership
Anytime Fitness, Harrow and Wealdstone	200	Registered Membership
Buzz Gym, Harrow	200	Registered Membership
Harrow Leisure Centre	195	Pay and Play
The Gym Group, Harrow on the Hill	170	Registered Membership
The Gym Group, North Harrow	170	Registered Membership
Golds Gym, Harrow	150	Registered Membership
Better Gym, Pinner	75	Registered Membership
The Hive, Edgware	56	Pay and Play
Xcelerate Gym, Edgware	50	Registered Membership
Snap Fitness, Kenton	37	Registered Membership
Harrow School Sports Complex	35	Registered Membership
Aspire Leisure Centre, Stanmore	33	Registered Membership
Whitmore High School, Harrow	24	Sports club/community assoc.
North London Collegiate School, Edgware	21	Private Use
Harrow High School, Harrow	20	Sports club/community assoc.
John Lyon School, Harrow	18	Private Use
Canons High School, Edgware	17	Sports club/community assoc.
Stanmore College, Stanmore	15	Private Use
St Dominic’s Sixth Form College, Harrow	14	Private Use
The Body Factory, Harrow	13	Pay and Play
Cedars Myplace Youth & Community Centre, Harrow	10	Sports club/community assoc.
Harrow College, Harrow-on-the Hill Campus, Harrow	10	Private Use
Total	1,752	

Source: Sport England October 2023.

- 5.31 The current population in the Harrow study area is 439,865. However, the household survey results suggest LB Harrow attracts 46.6% of gym trips in the study area equating to a catchment population of about 205,000 in 2023. Based on this current estimated catchment population (205,000) there is an average of 8.6 fitness stations per 1,000 people.
- 5.32 The London region has 1,128 Sport England registered health and fitness facilities with 81,364 fitness stations (average of 72 stations per facility). This existing provision equates to about 9 registered fitness stations per 1,000 people in Greater London. These figures suggest LB Harrow may have a slight under provision of health and fitness facilities i.e. 93 fitness stations.
- 5.33 Demand for additional facilities within LB Harrow should arise from future population growth and/or increased participation rates. Population within the study area is projected to increase to 468,181 in 2041, an additional 28,316 people. LB Harrow's catchment population in 2041 should be about 218,000 (46.6% of 468,181). Based on the London average of 9 fitness per 1,000 people, LB Harrow's health and fitness catchment population (218,000 in 2041) could support 1,962 fitness station, compared with existing provision of 1,752 fitness stations, which is an additional 210 fitness stations by 2041. This projected additional demand could support 2 large or 4 medium sized facilities.
- 5.34 The Requirements List suggests Anytime Fitness could be looking for new health and fitness facilities (3,500 to 8,000 sq.ft) in the Pinner and Stanmore.

Tenpin bowling and other indoor leisure innovations

- 5.35 Repurposed space in town centres has provided new opportunities for new leisure innovations. Vacated premises have been reconfigured and reused for trampolines, climbing, indoor golf, escape rooms etc. These and other innovations are likely to continue in the future because landlords will adopt a flexible approach to respond to arising opportunities.
- 5.36 The household survey results indicate about 17% of households visit ten-pin bowling/gaming facilities, but these trips are attracted to bowling facilities outside the study area. There are no tenpin bowling facilities in LB Harrow, since Lava Lanes closed in Stanmore. The main tenpin bowling destinations were:
- Tenpin, Royale Leisure Park, Acton (51% of participating households);
 - Hollywood Bowl, The Harlequin, Watford (22%);
 - All Star Lanes, Westfield, White City (5%);
 - Queens Skate Dine Bowl, Queensway (4%); and
 - Hollywood Bowl, Finchley (4%).
- 5.37 The Harrow study area's future 2041 population (468,181) can theoretically support 39 lanes, based on the national average of one lane per 12,000 people. If a new facility in LB Harrow could retain 40% to 50% of trips generated by the study area population then about 16 to 20 lanes could be supported.

5.38 Indoor trampoline centres are a relatively new leisure activity in the UK. In America outdoor trampoline centres were popular in the late 1950s and 1960s. This format first seen in America has been adopted and modernised and is now becoming a popular indoor leisure activity for a variety of age groups in the UK. The UK's first indoor trampoline centre was opened by Bounce in 2014.

5.39 Trampoline centres offer a new, recreational experience for both children and adults. They typically have over 100 interconnected trampolines on site, consisting of differing courts for all ages and abilities, as well as an arcade and party rooms.

5.40 The household survey results indicate 11% of respondents in the study area visit trampoline centres and 14% visit indoor soft play facilities. Trampoline destinations mentioned by households participating in this activity were as follows:

- Oxygen, Acton (47%);
- Inflata Nation, Colindale (9%);
- Jump In, Borehamwood (8%);
- Flip Out, Staples Corner Retail Park, Brent Cross (7%); and
- Topsy Turvy World, Brent Cross Shopping Centre (4%).

5.41 Indoor soft play destinations mentioned by participating households were as follows:

- Harrow Town Centre/Rumble Tumble (27%);
- Oxygen, Acton (9%);
- Inflata Nation, Colindale (8%);
- Partyman World of Play, Wembley (8%); and
- Parents Paradise, Watford (6%).

5.42 There may be potential scope for further provision in LB Harrow, but this sector is still evolving and its potential for continued growth is unclear. LB Harrow's strategy should be flexible to respond to any emerging demand for a trampoline centre.

The Requirements List suggests Inflata Nation could be looking for new leisure /inflatable area facility (14,000 - 20,000 sq.ft) in the Borough.

Bingo, games of chance and gambling

5.43 Gala (now Buzz Bingo) and Mecca are the main bingo operators, controlling over half of the UK market. Marketing of the bingo sector has been more proactive in recent years and Gala and Mecca have invested in premises, moving out of dated premises (i.e. converted cinemas) into purpose-built units. Bingo clubs have become increasingly sophisticated and have actively sought to attract all age groups. The bingo sector usually prefers central locations that are accessible by public transport and by foot. However, the significant increase in on-line gambling has, and will continue to affect this sector.

5.44 The Gambling Commission indicates there are 646 bingo facilities in Great Britain (2020) and 156 casinos. This equates to approximately one bingo facility per 75,000 adults, and one casino per 330,000 adults.

- 5.45 The household survey results indicate less than 4% of respondents in the study area visit bingo facilities, just below the UK average participation rates of around 5%. Around 20% of participating households visit bingo facilities in Central London. Other main bingo club destinations mentioned by households participating in this activity were as follows:
- Buzz Bingo, Borehamwood (11%);
 - Pinner Green Social Club, Pinner (6%);
 - Merkur Bingo, Cricklewood (5%); and
 - Mecca Bingo, Hayes (2%).
- 5.46 The adult population in the Harrow study area (about 370,000 in 2023) in the study area is theoretically capable of supporting about five bingo facilities and one casino, based on the UK averages. There could be potential for bingo facilities in LB Harrow, but the continued growth in online bingo and gambling may restrict operator demand, which suggests there is no need to identify a site for a new facility.

Hotels accommodation

- 5.47 The UK hotel market represents a significant part of the leisure economy. British residents alone generated 118.9 million trips with 421 million nights, spending £27.2 billion on overnight trips within Great Britain between April 2021 to December 2021 (source: Visit England). For 2023 the inbound forecast for the UK is 35.1 million visits spending £29.5 billion.
- 5.48 The GLA's Working Paper 88 – Projections of demand and supply for visitor accommodation in Lond to 2050 (April 2017) indicated the supply of serviced room accommodation in London was 145,737 rooms. This included 718 rooms in LB Harrow, only 0.5% of London's total supply. This pre-Covid pandemic working paper projected the number of international visitor nights in London would increase from 108.3 million in 2015 to 151.2 million in 2041.
- 5.49 The number of domestic over-night visitor nights was projected to increase from 30.2 million to 45.2 million over the same period, a 49.7% increase. Total visitor nights was projected to increase from 138.5 million to 196.4 million, a 41.8% increase.
- 5.50 The working paper suggested this increase in visitors nights would require a net increase of 58,140 rooms between in 2015 and 2041, or a gross increase of 77,019 rooms, assuming 0.4% of the existing stock closes each year. Allowing for pipeline supply the net additional requirement between 2015 and 2041 was estimated to be 64,171 room. LB Harrow's share of these pre-Covid projections was 380 rooms, which suggested about 15 rooms per annum would be required in LB Harrow up to 2041. Since 2017 there have been some hotel closures in the Borough, but these closures have been counter-balanced by new hotel developments, e.g. Travelodge at Greenhill way in Harrow.
- 5.51 It is not clear what the long term impact of the Covid pandemic and the continued growth of Airbnb will be on the future demand for hotel rooms in London and LB Harrow. Statista Research suggested the actual number of overseas tourists to London increased from 19.38 million in 2015 to 21.71 million in 2019. This 12% increase supports the previous growth projections. However, the number of tourist visitors slumped to only 2.72 million in 2021

but had recovered to 16.12 million in 2022. Assuming a full recovery to pre-Covid levels of demand, it seems reasonable to assume past levels of growth in hotel demand between 2023 and 2041, which suggests about 270 rooms could be required in LB Harrow during this period (15 rooms per annum over 18 years).

- 5.52 The Requirements List suggests Travelodge could be looking for new hotel facilities (10,000 to 40,000 sq.ft) in the Harrow, Pinner and Stanmore areas of the Borough. Innkeepers Lodge may also be looking for a pub/restaurant/hotel facility in Harrow.

Conclusions on commercial leisure and other town uses

- 5.53 The leisure, entertainment and cultural sectors are fragmented and innovative. There are many activities that could be promoted e.g. museums, art galleries, exhibition space, tourist attractions. The analysis suggests the scope for some traditional leisure activities often found in town centres may be limited e.g. cinemas and theatres, but new emerging leisure activities such as escape rooms and virtual golf centres should provide more potential. The representation of these emerging uses, in particular, is likely to increase in LB Harrow because there will be gaps in provision. Given the fragmented nature of these sectors it is difficult to precisely quantify the potential demand for these uses over the next 15 years.

- 5.54 In global terms future expenditure growth could support new commercial leisure and cultural floorspace in LB Harrow of:

- about 3,100 sq.m by 2031;
- about 5,000 sq.m by 2036; or
- about 7,000 sq.m by 2041.

- 5.55 This additional floorspace could include:

- a small boutique cinema (2-3 screens), if proposals to re-open the Safari Cinema in Harrow are not implemented;
- 2 large or 4 medium sized health and fitness facilities (about 210 new fitness stations in total);
- new leisure innovations e.g. trampolines, indoor climbing, escape rooms, virtual sport activities; and
- small scale tourist attractions/cultural facilities.

- 5.56 The development strategy should be flexible to respond to emerging opportunities for new leisure, entertainment and tourist related facilities. The opportunities to reoccupy vacated retail space should be considered.

6.0 Employment land supply and demand

6.1 This section reviews the overall demand and supply of employment land, particularly for offices, within LB Harrow. It is based on the latest published Council evidence on employment land needs, and monitoring data on the availability of employment land with a particular focus on offices.

Demand Position

6.2 Demand for office space in LB Harrow is primarily driven by local companies, many of whom have had an historical presence within the Borough. The bulk of demand from these companies are for smaller premises of 100 to 500 sq.m.

6.3 As noted in Section 3.0, the Harrow market is characterised by older, secondary stock. As these spaces are not suitable for sub-division, they often cannot meet the space and flexibility requirements of smaller businesses. This has generated excess demand for the limited stock of 'Grade A' office space in the Borough. However, since the onset of the pandemic in 2020, year-on-year growth in the rents for higher-quality (4 and 5 star) office space in Harrow has declined, with a Compound Annual Growth Rate (CAGR) of 0.7%, compared to the 2013-2019 CAGR of 7.2%.

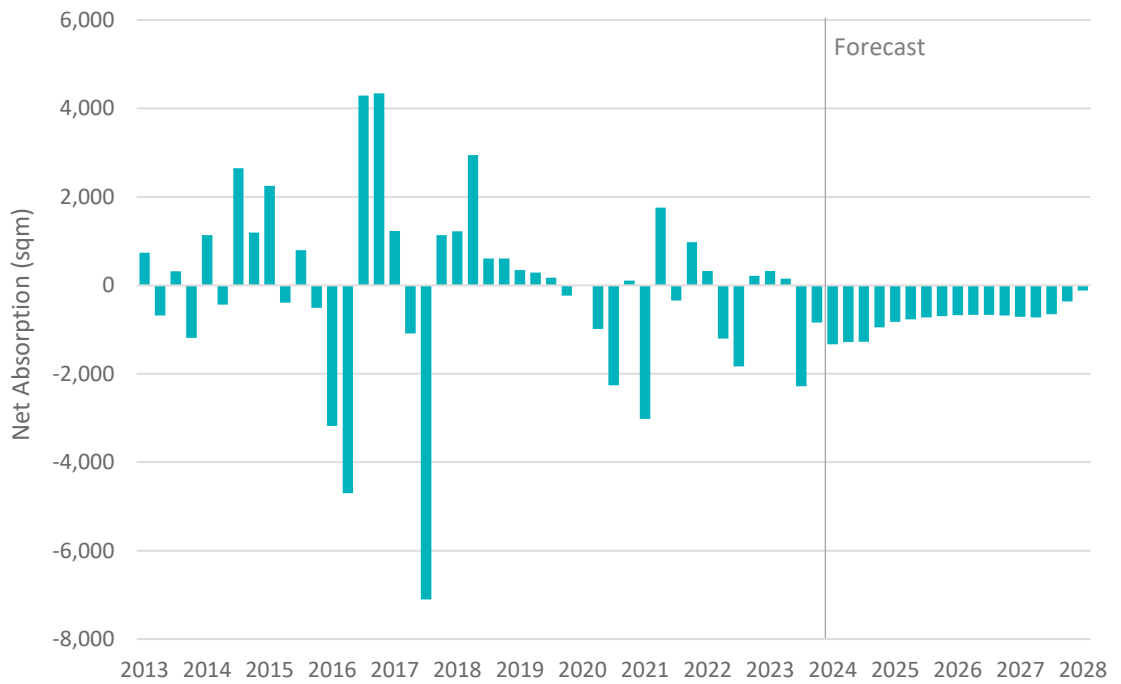
6.4 Despite rising rents within Central London, few firms have relocated their HQ or back-office functions to the Borough. From market feedback, it is likely that this relates to the lack of suitable floorspace and an insufficient wider retail and leisure offer to attract businesses to relocate into the Borough.

6.5 UK Business Counts⁶ data demonstrates that between 2010 and 2023 the total number of businesses in Harrow increased by 64%, or 3.9% year-on-year, to reach 14,945 in 2023. This was primarily driven by strong growth among MSMEs, however, the number of large businesses (with more than 250 employees) reduced by 20% over the period. The year-on-year growth rate for MSMEs was greater than the average for London (3.6%) and for England as a whole (2.1%). Meanwhile, the number of large enterprises grew over the period in London more widely, and in England as a whole. This suggests that the firms relocating from the Borough are typically larger enterprises, while MSMEs have generally remained in Harrow.

6.6 This is further demonstrated by recent trends in net absorption, wherein the Harrow office market has registered an average annual decrease of 700 sq.m per year since 2018 (i.e., more space is being vacated than occupied). CoStar projections suggest that net absorption will remain negative in all periods over the forecast horizon, as shown in Figure 6.1.

⁶ ONS (2023) UK Business Counts – Enterprises by industry and employment size band

Figure 6.1 Net absorption in Harrow Borough, 2013-2028



Source: CoStar (October 2023)

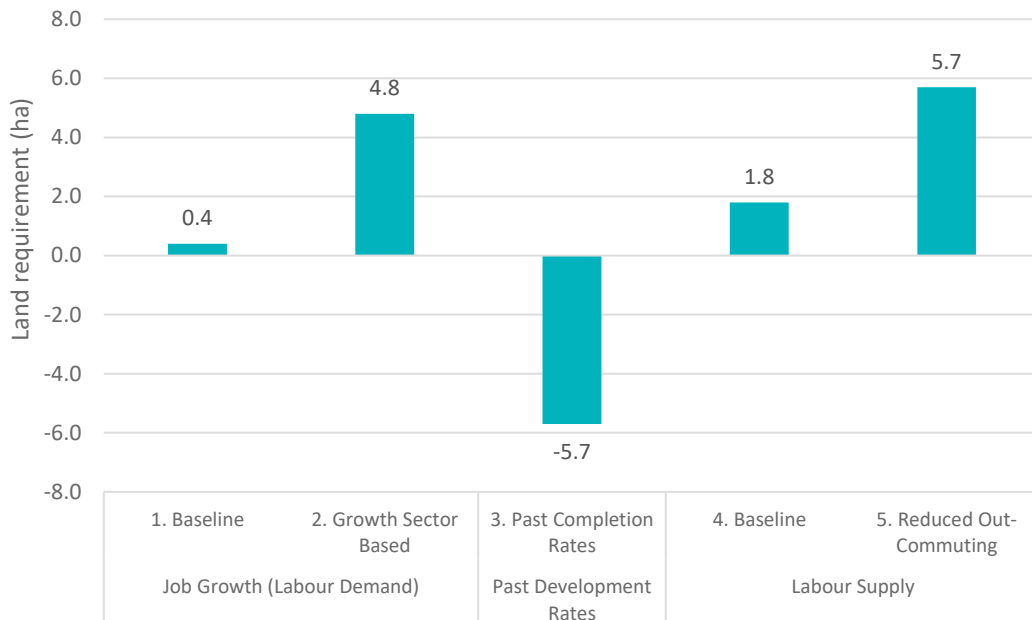
6.7 The 2017 EDNS, produced by Lichfields, projected the demand for office employment space (at that time in B1a/B1b use classes) for the period 2016-2036 to range from -114,780 square metres (a net loss) under a scenario based on past completion rates, up to 113,080 square metres (a net gain) under a scenario considering a reduction in out-commuting within the local labour market. These scenarios are shown in Figure 6.2 and Figure 6.3.

Figure 6.2 Gross floorspace requirement for offices in LB Harrow by scenario, 2016-2036



Source: Lichfields (2017) Harrow Economic Development Needs Assessment

Figure 6.3 Gross land requirements for offices in LB Harrow by scenario, 2016-2036



Source: Lichfields (2017) Harrow Economic Development Needs Assessment

- 6.8 In the intervening period since the EDNS was produced, the inventory of B1 office floorspace in Harrow posted a net loss of 83,000 square metres between 2017 and 2022, according to data supplied by the Borough for the purposes of this report. This suggests the low scenario set out in the EDNS, based on past completion rates, may align best to the current office market outlook.
- 6.9 However, while that scenario covered a 20-year period (i.e. 2016-2036), nearly 80% of the forecast reduction has already occurred within the first seven years. This suggests that the rate of contraction in the Borough's office stock has been occurring more rapidly than was originally forecast. This is explored in more detail below.

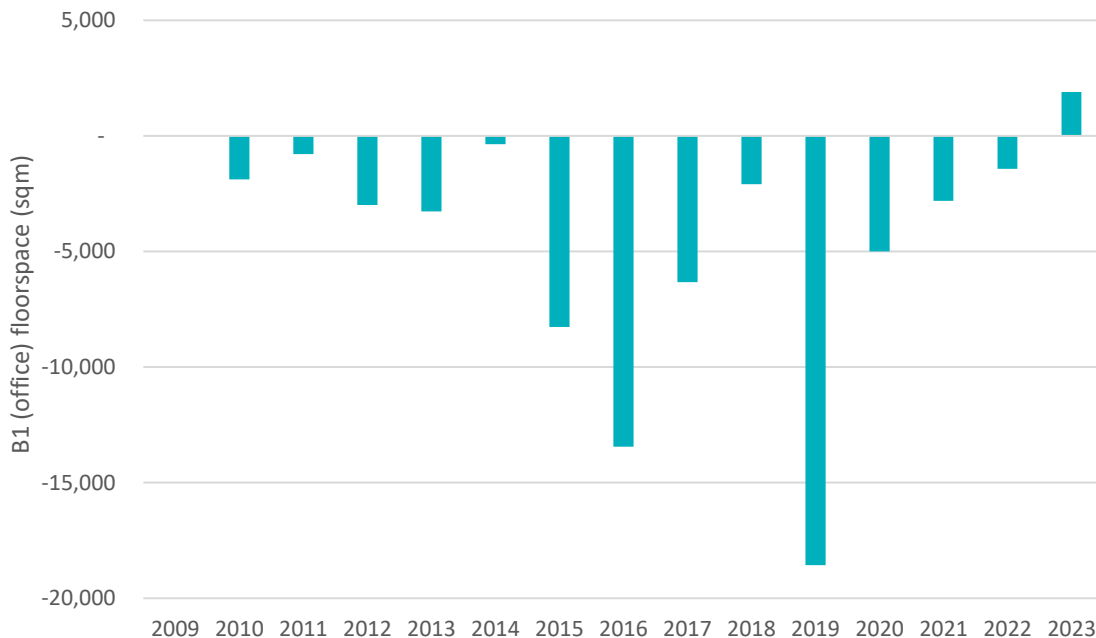
Supply Position

- 6.10 In the past decade, supply of office space has been depleted through the introduction of office to residential Permitted Development Rights in 2013. While this has primarily focused on poor quality and vacant office spaces, it has also reduced the supply of higher-quality spaces. Owing in part to this under supply, rents across all office spaces in Harrow have risen by 66% since 2013. Upward pressure on rents has subsided since the onset of the Covid-19 pandemic as new modes of working has reduced demand for office spaces, both within Harrow and more widely across London.
- 6.11 The Harrow Local Plan Core Strategy was adopted in February 2012 and covers the period to 2026. Two sites were identified as 'Employment-led Development Sites' within the local plan allocations:
- Northolt Road Business Use Area (North and South), South Harrow
This site allocation includes 10,660 square metres of employment floorspace, primarily in the form of offices, in addition to up to 150 homes, on a site of 2.6 hectares.
 - Rayners Lane Offices, Imperial Drive, Rayners Lane
A 1 hectare site proposed for conversion from office and college uses to include up to 150 homes and redeveloped office floorspace in the region of 4,100 square metres.
- 6.12 However, the development of these sites to date has primarily focused on the residential components. At the Imperial Drive site allocation, Broad House (formerly Imperial House), was recently converted to provide 218 new flats⁷. This has resulted in the loss of 9,587 sq.m of Class B1(a) office space. This was the largest completion of a Prior Approval scheme for the change of use from office to residential in the Borough as of March 2023. A further 74 flats have been developed at Talbot House, resulting in a loss of 4,847 sq.m of office floorspace. Together, these schemes have provided almost twice the potential housing capacity of 150 dwellings stated within the Local Plan Site Allocations document.
- 6.13 At 190-194 Northolt Road, within the Northolt Road Business Use Area (South), work on a residential conversion to provide 30 flats is ongoing. Bovis House at 142 Northolt Road, also within the Business Use Area, will provide 101 new flats and result in the loss of 7,580 sq.m of office floorspace.
- 6.14 Data on completions supplied by the Borough demonstrates consistent losses in B1 office floorspace over the past decade. As shown in Figure 6.4, over the period 2013-2022 more than 130,000 sq.m of B1 office floorspace in Harrow was lost through both demolition and

⁷ Harrow Borough Council (2023) Briefing Note 24: Prior approval for Change of Use from Office to Residential.

conversion to other uses, including residential⁸. While net loss of office floorspace decreased in 2021 and 2022, this mirrors an overall pattern of fewer completions across all use classes within the Borough since 2020.

Figure 6.4 Net change in B1 (office) floorspace in LB Harrow, 2013-2022



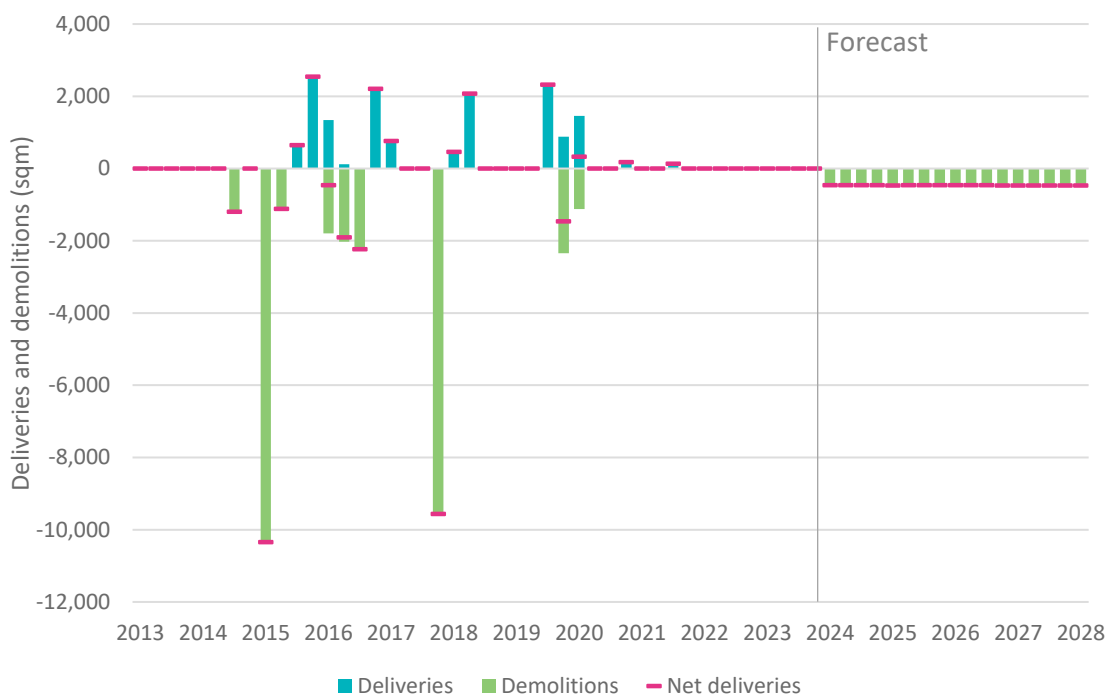
Source: London Borough of Harrow | Lichfields analysis

- 6.15 The AMR states that, at the end of the 2018-19 financial year, permissions for schemes resulting in a loss of over 48,000 sq.m had been approved in Harrow Town Centre alone; permissions across the Borough would result in a loss of over 115,000 sq.m.
- 6.16 Current data on extant planning permissions⁹ for developments that seek to create or expand office floorspace in LB Harrow amount to 4,548 sq.m, however, permissions for the removal of office floorspace amount to 12,000 sq.m; this implies a net loss of 7,452 sq.m.
- 6.17 Data on construction activity in the Harrow office market from CoStar shows a similar pattern of decline in construction and completions in recent years. There have been no recorded construction starts for office floorspace within Harrow since Q4 2020, while all construction activity ceased in Q2 of 2021 and has yet to restart as of Q3 2023. As shown in Figure 6.5, net deliveries of office floorspace have remained at, or close to, zero since early 2020. CoStar projections suggest no construction of new floorspace is anticipated within the next five years, leading to negative net delivery over the forecast period with demolition activity expected to resume in 2024.

⁸ Between 2013 and 2022, 127 class B1 office premises were replaced with class C3 residential dwellings.

⁹ Permissions considered are those with expiry dates from 1st January 2024 onwards.

Figure 6.5 Deliveries, demolitions and net deliveries of office floorspace in LB Harrow, 2013-2028



Source: CoStar (October 2023)

6.18 Based on the above, an assessment of the current supply position as of 2023 within the Harrow office market is shown in Table 6.1.

Table 6.1 Harrow Office Land Supply Position

Typology ¹⁰	Supply (ha)
Extant permissions	-0.3
Current available land	0.9
Projected net delivery of office floorspace	-0.3
Total	0.3

Source: LBH (2023), CoStar (2023)

Demand/Supply Balance

6.19 A comparison between the employment land requirements from the 2017 EDNS and the updated assessment of the supply position identifies 0.3 hectares of land supply; this is shown in Table 6.2. The 2017 demand estimates have been adjusted on a pro-rata basis to reflect the position in 2023, assuming the overall scenario trajectories are unchanged.

¹⁰ Floorspace converted to land area assuming an average plot ratio of 0.4.

Table 6.2 Demand/Supply Balance in LB Harrow, 2023-2036

Scenario	Office requirement (ha)	Office supply (ha)	Balance (ha)
High – Reduced out-commuting	+3.7	+0.3	-3.4
Low – Past completion rates	-3.7		+3.4

Source: Lichfields analysis

- 6.20 This analysis assumes that all regeneration and private sector sites will come forward in full for employment over the 2023-2026 period. Any deviation from this assumption may affect the balance of supply and demand in Harrow over this horizon.
- 6.21 Further, it should be noted that the demand-based requirements maintain the 10% buffer included within the original 2017 assessment. The resulting supply/demand position represents a quantitative assessment; however, qualitative considerations and market signals should also be considered within a wider, holistic assessment of the Harrow office market. This may include consideration of the space requirements of firms within the market, and priorities for modernisation of existing premises.

Summary

- 6.22 Overall, trends in net absorption since 2017 suggest a lower demand scenario may best reflect current market conditions, such as the baseline labour demand and supply scenarios, or the past completion rates scenario.
- 6.23 The supply of office space in the Borough has declined since the 2017 EDNS, with extant permissions data and net deliveries projections suggesting supply will further contract in the coming years. However, current levels of availability outweigh the extant permissions loss and projected net delivery losses, amounting to an overall supply position of 0.3 hectares of land.
- 6.24 Focusing on the low demand scenario presented in Table 6.2, there is a potential surplus of office employment land in Harrow over the forecast period; in this demand scenario, there is estimated to be a total surplus of 3.4 hectares. However, as the forecast period for supply only extends to Q1 2028, the scenario does not account for projected net deliveries after this period, and by default assumes there to be no net deliveries between 2028 and 2036; if net deliveries were to remain negative after Q1 2028, the total supply of land to 2036 would be further reduced.

7.0 Implications for future policy

Accommodating growth and change

National guidance

- 7.1 For planning policies, local authorities are still required to support the role of town centres and the three main areas policies should focus on:
- defining a network and hierarchy of centres, allowing them to grow and diversify;
 - defining the extent of centre boundaries and primary shopping areas, making clear the uses permitted in these locations; and
 - allocating a range of suitable sites to meet the scale and type of development needed for at least 10 years ahead, sites should be allocated consistent with the sequential approach i.e. town centre, then edge-of-centre followed by accessible out-of-centre sites.
- 7.2 The NPPF acknowledges the rapid changes that are affecting town centres. It recognises that diversification is key to the long-term vitality and viability of town centres, including the need for residential development. Accordingly, planning policies should clarify the range of uses permitted in such locations, as part of a positive strategy for the future of each centre. However, as indicated in Section 2, the recent changes to the UCO and PDR significantly restrict the Council's ability to control the mix of uses within centres through a plan-led approach.
- 7.3 The importance of a mix of retail and other town centre activity has increased in recent years and town centres increasingly need to compete with on-line shopping. Town centres need to focus on providing a better service and experience. This enhanced experience could be improvements to the range of activities on offer (including innovative activities), the built environment and green infrastructure. The potential to provide a better mix of uses that extend activity throughout the daytime and into the evenings may also contribute to the viability and attraction of town centres.
- 7.4 The NPPF's presumption in favour of sustainable development remains. For plan-making this means that plans should positively seek opportunities to meet the development needs of their area and be sufficiently flexible to adapt to rapid change. It is widely accepted that very long-term projections have inherent uncertainties. In response to these uncertainties, local planning authorities are no longer required to allocate sites to meet the need for town centre uses over the full plan period. The need for new town centre uses over a minimum ten-year period reflects the complexities in bringing forward town centre development sites. This guidance suggests the emerging new Local Plan should seek to accommodate projected growth up to 2036 as a minimum. In line with the Government's economic growth agenda, a positive approach to meeting community needs is still required.
- 7.5 Applications for retail and town centre uses that are not in an existing centre and are not in accordance with an up-to-date Local Plan will need to be assessed against the sequential and impact tests.
- 7.6 The sequential test in the NPPF indicates main town centre uses should locate in town centres, then in edge of centre locations; and only if suitable sites are not available (or expected to become available within a reasonable period) should out-of-centre sites be considered. When considering edge-of-centre and out-of-centre proposals, preference

should be given to accessible sites which are well connected to the town centre. Applicants and local planning authorities should demonstrate flexibility on issues such as format and scale, so that opportunities to utilise suitable town centre or edge of centre sites are fully explored (paragraph 88).

- 7.7 The NPPF states that local planning authorities should require an impact assessment for applications for retail and leisure development outside of town centres, which are not in accordance with an up-to-date development plan and are over a proportionate, locally set floorspace threshold. If there is not a locally set threshold, the default threshold is 2,500 sq.m. Where an application fails to satisfy the sequential test or is likely to have a significant adverse impact, it should be refused.
- 7.8 The appropriate balance between retail and other town centre activity has been debated in recent years, as town centres increasingly need to compete with on-line shopping. On-line shopping is likely to grow faster than previously expected due to shifts in customer behaviour accelerated by the Covid-19 crisis. The need for a better mix of uses within town centres has become increasingly important. A broader mix of uses should extend activity throughout the daytime and into the evenings.
- 7.9 As set out in Section 2, the Use Classes Order (UCO) was significantly amended in September 2020 and changes to permitted development rights were introduced in August 2021. These changes will have significant implications for shop frontage planning policies, restricting the ability of local planning authorities to control the mix of uses.

Retail and leisure floorspace capacity projections

- 7.10 The expenditure projections in this study exclude home shopping made through non-retail businesses, because special forms of trading (sales via the internet, mail order, stalls and markets) have been deducted. The assessment adopts Experian's latest information and projections and assumes that special forms of trading will increase in the future, including the growth of internet shopping.
- 7.11 The assessment of the potential for new retail, food/beverage and leisure/entertainment floorspace in the previous sections suggests there is modest long-term scope for new development within LB Harrow. Tables 6.1, 6.2 and 6.3 below summarise the floorspace projections in the Borough up to 2031, 2036 and 2041 (cumulative).
- 7.12 These projections assume LB Harrow can maintain its market share of expenditure in the future. This approach recognises that additional development within the Borough could help to increase the area's market share, but this increase will be counter-balanced by development within competing centres e.g. Brent Cross. A balanced and sustainable approach has been adopted.
- 7.13 Table 7.1 indicates there is a small combined projected requirement for LB Harrow of 4,100 sq.m gross in 2031. By 2035, the combined cumulative requirement increases to 8,500 sq.m gross (Table 7.2) and then to 13,900 sq.m gross in 2041 (Table 7.3). These combined cumulative floorspace capacity projections need to be considered in terms of the availability of existing vacant floorspace that may be suitable to accommodate this projected growth. The future distribution of growth also needs to be considered.

Table 7.1 Combined retail, food/beverage, leisure, entertainment floorspace requirements up to 2031 (sq.m gross)

Zone / area	Convenience retail	Comparison retail	Food/ beverage	Total
1 - Harrow Central	-2,000	1,300	2,900	2,200
2 - Harrow Southwest	-500	100	500	100
3 - Harrow Northwest	400	-400	1,700	1,700
4 - Harrow Northeast	1,500	-400	900	2,000
5 - Harrow Southeast	-1,900	-200	200	-1,900
Total	-2,500	400	6,200	4,100

Table 7.2 Combined retail, food/beverage, leisure, entertainment floorspace requirements up to 2036 (sq.m gross)

Zone / area	Convenience retail	Comparison retail	Food/ beverage	Total
1 - Harrow Central	-800	1,700	4,200	5,100
2 - Harrow Southwest	-500	-100	800	200
3 - Harrow Northwest	600	-700	2,600	2,500
4 - Harrow Northeast	1,900	-800	1,400	2,500
5 - Harrow Southeast	-2,000	-200	400	-1,800
Total	-800	-100	9,400	8,500

Table 7.3 Combined retail, food/beverage, leisure, entertainment floorspace requirements up to 2041 (sq.m gross)

Zone / area	Convenience retail	Comparison retail	Food/ beverage	Total
1 - Harrow Central	-300	2,400	5,500	7,600
2 - Harrow Southwest	-300	-100	1,300	900
3 - Harrow Northwest	900	-800	3,600	3,700
4 - Harrow Northeast	2,100	-1,000	2,000	3,100
5 - Harrow Southeast	-1,900	-200	700	-1,400
Total	500	300	13,100	13,900

Source: Tables 4.5, 4.6 and 4.7 (rounded).

- 7.14 Development plans should identify the scale of need for main town centre uses and assess whether the need can be met on town centre sites or through the expansion of centres. The NPPF indicates that local plans should allocate a range of suitable sites to meet the scale and type of retail, leisure and other development needed in town centres for at least 10 years. In this case projections at least up to 2036 will need to be considered, allowing time for future policy to be formulated and adopted. To accommodate growth, local planning authorities should keep town centre boundaries under review.
- 7.15 The combined cumulative floorspace projection to 2041 is 13,900 sq.m gross. As indicated in Section 2.0, long-term projections have inherent uncertainties, but it is better to plan for higher growth and then modify the strategy later if levels of growth are lower than originally predicted. Despite the uncertainties relating to very long-term projections, the emerging Local Plan should address floorspace projections up to 2036 i.e. 8,500 sq.m gross in total.
- 7.16 The capacity projections for convenience goods retail floorspace in the north of the Borough (zones 3 and 4) relates to population growth, which suggests some new small scale local facilities could be supported by housing developments in this area. The comparison goods retail floorspace projections in Zone 1 – Central Harrow relate primarily to growth in expenditure per capita rather than population growth. These projections suggest new residential uses in town centres are unlikely to have a significant impact on the demand for

retail floorspace. About a quarter of the capacity projection for food/beverage floorspace relates to population growth, with three quarters linked to growth in expenditure per capita.

- 7.17 Growth in the food/beverage and commercial leisure, entertainment and culture sectors provides an opportunity to enhance the evening and night-time economy in LB Harrow’s centres, including the repurposing of retail floorspace in some centres. The emerging Local Plan should recognise and foster this potential, albeit recognising potential negative environmental and amenity effects and considering appropriate management strategies and mitigation measures.

Vacant shop premises

- 7.18 The existing stock of premises should help to accommodate projected growth. The need assessment in this report assumes that existing retail and service floorspace can, on average, increase its turnover to sales floorspace densities. In addition to the growth in sales densities, vacant shop premises should help to accommodate future growth.

- 7.19 The Council’s latest land use survey (2023) indicates there were 100 vacant shop units within the designated centres in the Borough, an average vacancy rate of 6%, which is significantly below the UK average (14.5%), although the London average is also likely to be below the UK average. The total amount of vacant floorspace in the designated centres is about 14,000 sq.m gross. There were a further 54 vacant units in out-of-centre locations in the Borough totalling about 7,600 sq.m gross, with a vacancy rate of 7.4%.

- 7.20 It may be reasonable to assume the Borough’s shop unit vacancy rate could reduce to around 4% across the Borough. If achieved, this reduction in the shop unit vacancy rate could theoretically accommodate over 10,000 sq.m of new uses, which exceeds the projected combined retail and food/beverage floorspace under-supply up to 2036 (8,500 sq.m gross). On this basis, reoccupied vacant floorspace could be distributed as follows:

- Harrow town centre 5,100 sq.m gross
- Wealdstone 600 sq.m gross
- Burnt Oak 300 sq.m gross
- Pinner 300 sq.m gross
- Hatch End 200 sq.m gross
- North Harrow 200 sq.m gross
- Kenton 100 sq.m gross
- Stanmore 100 sq.m gross
- Out-of-centre 3,500 sq.m gross.

- 7.21 The floorspace projections up to 2036 and current level of vacant floorspace suggest there is no quantitative need to increase the combined amount of retail and food/beverage floorspace in the Borough over a 10-year period. However, there is likely to be a shift from retail to food/beverage uses, with some vacant shop premises also converting to these uses.

- 7.22 The changes to the Use Classes Order and permitted development rights, as described in Section 2, will provide more flexibility for landowners to change the use of retail premises to other town centre uses and residential and restrict LB Harrow’s ability to control the mix of uses in the future.

- 7.23 The capacity projections in this update suggest there is no pressing requirement to allocate sites for major retail development to accommodate projected growth over the next 10 years. The priority in the short to medium term will be the reoccupation of vacant shop units, potentially for non-retail uses including food/beverage outlets, leisure, entertainment and cultural uses. However, the floorspace projections and relatively low shop vacancy rates suggest there is still a need to retain the existing stock of shop premises within all designated centres.
- 7.24 The future strategy should be flexible to respond to new investment that cannot be accommodated in vacant units. Some redevelopment, refurbishment and expansion may be required in addition to the reoccupation of vacant units, ideally within town centres to accommodate future investment opportunities.

Hierarchy of centres

- 7.25 The network of town centres is currently set out in Appendix B of the Harrow Core Strategy (February 2012). Harrow town centre is the largest and dominant town centre in the Borough, consistent with its designation as a Metropolitan Centre in the London Plan. The retail and food beverage floorspace capacity projections up to 2036 suggests about 60% of the projected growth should be provided in the Harrow central zone, which will primarily be Harrow town centre.
- 7.26 The eight designated district centres, located predominantly in the Borough all continue to play an important role as a focal point in their respective areas. It is appropriate to continue to differentiate these district centres from the smaller local centres in the Borough.
- 7.27 The analysis of designated local centres in Section 3 and Appendix 2, indicates only Hatch End could potentially be large enough to be considered as a potential District Centre, but this would need to be promoted through the London Plan review process. Furthermore, Hatch End is much smaller than most of the district centres in the Borough in terms of the total number of units (79) and the amount of comparison and convenience goods retail outlets. Hatch End has limited physical potential to expand to an extent that would support its reclassification as a District Centre.
- 7.28 The NPPF Annex 2 Glossary indicates:
“References to town centres or centres apply to city centres, town centres, district centres and local centres but exclude small parades of shops of purely neighbourhood significance.”
- 7.29 The analysis of designated local centres indicates that the Borough’s five designated local centres in the Borough are reasonably large (with between 36 to 79 outlets). Smaller parades of shops within the Borough should not be classified as local centres.
- 7.30 The network of main and local centres should continue to be protected and enhanced to ensure appropriate accessibility to important facilities for all sections of the community and to ensure sustainable shopping patterns.

Impact and sequential tests

- 7.31 Future Local Plan policy should set out the sequential and impact tests and which designated centres need to be considered. The NPPF states that, when assessing applications for retail and leisure development outside of town centres and not in

accordance with an up-to-date local plan, local planning authorities should require an impact assessment if the development is over a proportionate, locally set threshold.

Impact threshold

- 7.32 New Local Plan policy should set out the sequential and impact tests and which designated centres need to be considered. The NPPF states that, when assessing applications for retail and leisure development outside of town centres which are not in accordance with an up-to-date local plan, local planning authorities should require an impact assessment if the development is over a proportionate, locally set threshold. The London Plan Policy SD7 is consistent with the NPPF in relation to the sequential and impact tests, although the impact test in the London Plan refers to office uses as well as retail and leisure uses. The new Local Plan in LB Harrow could adopt either the London Plan or NPPF approach. However, there is no need to assess the impact of office development in the Borough provided the sequential test is satisfied.
- 7.33 The NPPF indicates, if there is no locally set threshold, then the default impact threshold is 2,500 sq. m gross. The PPG provides guidance on setting locally appropriate thresholds, and indicates it will be important to consider:
- the scale of proposals relative to town centres;
 - the existing viability and vitality of town centres;
 - cumulative effects of recent developments;
 - whether local town centres are vulnerable;
 - the likely effects of development on any town centre strategy; and the impact on any other planned investment.
- 7.34 The PPG also states that where authorities do not have their own floorspace thresholds for impact assessments in local development plans, national policy requires impact assessments to be submitted for retail and leisure developments over 2,500 sq.m gross. The PPG acknowledges the need to consider the impact of proposals below this floorspace threshold, e.g. if they are large developments when compared with the size of a nearby centre, or likely to have a disproportionate effect or ‘tip the balance’ of a vulnerable centre.
- 7.35 The NPPF minimum threshold of 2,500 sq.m gross may be an inappropriate threshold for LB Harrow because this scale of development would exceed the overall long-term retail/food beverage projections for all zones in the Borough. The lower retail capacity projections and uncertainties about the cost of living crisis suggest town centres are now more vulnerable to out-of-centre developments.
- 7.36 Given the overlapping nature of catchment areas in LB Harrow, a consistent impact threshold should be applied across the authority area. However, policy should also indicate that impact assessments should be proportionate to the scale of development proposed.
- 7.37 The Council should consider reducing the impact threshold to 400 sq.m gross consistent with the Sunday trading threshold. This threshold should apply to retail and leisure uses combined, also combined floorspace across different phases of development. All retail and leisure developments over 400 sq.m gross (combined) proposed outside or on the edge of designated Metropolitan, District and Local Centres should be required to prepare a proportionate impact assessment, including retail and leisure uses included within mixed use allocations. The level of detail required in the impact assessment will vary case-by-case

and it is for the applicant to provide robust justification that their impact assessment is robust, appropriate and proportionate.

- 7.38 Retail and leisure uses previously related to use classes A1 to A5 and D2 leisure uses. Changes to the UCO may lead to confusion, at least until the NPPF is amended to reflect the UCO changes. For example, not all uses within the new Class E are retail or leisure uses, requiring an impact assessment i.e. offices and medical uses. Bearing in mind the potential for confusion arising from the UCO changes and for consistency with the NPPF, future policy relating to the impact test should refer to retail and leisure uses rather than Class E within the new UCO. As indicated above, the London Plan indicates the impact proposals for out of centre office uses should also be considered. The inclusion of office uses within the sequential test should offer appropriate control in the Borough, consistent with the NPPF.

Implications of UCO changes for the impact and sequential tests

- 7.39 Retail and leisure uses previously related to use classes A1 to A5 and D2 leisure uses. Changes to the UCO may lead to confusion, at least until the NPPF is amended to reflect the UCO changes. For example, not all uses within the new Class E are retail or leisure uses, requiring an impact assessment i.e. offices and medical uses. Bearing in mind the potential for confusion arising from the UCO changes and for consistency with the NPPF, Local Plan policies relating to the impact test should refer to *retail* and *leisure* uses rather than Class E within the new UCO. Clearly movement within Class E does not require planning permission, therefore an impact assessment would not be required in these circumstances. The use of planning conditions to restrict the mix of Class E uses within new development will need to be considered on a case-by-case basis.

Sequential test floorspace threshold

- 7.40 The NPPF does not refer to a minimum floorspace threshold where the sequential test will be applied in the same way as the impact test. All main town centre uses regardless of scale are required to comply with the sequential test. However, the PPG suggests some certain main town centre uses have “*particular market and locational requirements that mean they may only be accommodated in specific locations*”, but robust justification must be provided to satisfy the sequential test in this respect. This approach may allow local facilities to be provided in areas that are poorly served and/or within mixed use development to provide facilities catering for the local needs of the development, without needing to consider the sequential test.

Town centre boundaries

- 7.41 The London Plan Policy SD7 indicates development plans should define detailed boundaries for town centres. Designated town, district and local centre boundaries should be tightly drawn to assist in controlling the appropriate scale and nature of development. Designated centres remain the expected focus for retail, leisure and other main town centre uses. The continued classification of centres within the hierarchy is important in identifying which centres are relevant in the search for sequential sites.
- 7.42 The continued identification of town centre boundaries is important when applying the sequential approach, to direct retail and other town centre uses to sustainable locations and determine whether a retail impact assessment is required. The NPPF continues to indicate that the first preference for retail and other town centre uses should be the primary shopping areas (PSA) for retail uses and the town centre boundary for other town centre

uses. The first preference for leisure uses is normally the wider defined town centre, which usually includes the PSA and other parts of the town centre. The ability to focus new retail uses within the PSA, rather than the wider town centre area, has become more difficult with the introduction of the new Class E, which allows free movement to and from retail use and other town centre uses.

- 7.43 Policy DM35 (New Town Centre Development) of the Harrow Development Management Policies (July 2013) indicates new retail, leisure and cultural development should be focussed within town centres. Where centres have a designated Primary Shopping Area (PSA) the supporting text indicates retail development should be focused in the PSA rather than the wider town centre area. New Local Plan Policy regarding edge and out-of-centre development should be consistent with the NPPF in terms of the sequential and impact tests and should be worded to refer to the centre boundaries and PSA. The PSA normally comprises the core/primary shopping frontages and the contiguous secondary shopping frontages. In small centres the PSA (primary and secondary frontages combined) and the town centre boundary may cover the same area and it may be unnecessary to designate two boundaries. The need for separate town centre and PSA boundaries within District Centre should be considered, particularly due to additional flexibility provided under the new Class E. A separate PSA may only be appropriate in Harrow Metropolitan Centre but not the District Centres where a single centre boundary should suffice for sequential test purposes.
- 7.44 All main town centre uses located outside or on the edge of designated Metropolitan, District and Local Centres should be required to consider the sequential test. The area of search for sequential sites i.e. relevant centres will depend on the scale, nature and location of the proposed town centre uses and the catchment area they are likely to serve, should be considered on a case-by-case basis. Some proposed main town centre uses may have market and locational requirements that cannot be met within designated centres. Where this requirement is suggested, robust justification must be provided by the applicant.
- 7.45 The relatively low floorspace capacity projections and vacant shop units suggest there is no need to extend the centre boundaries to accommodate future growth. The floorspace projections suggest a short term over-supply of retail floorspace imply the contraction of some centre boundaries could be considered. However, longer term projections to 2036 and 2041 suggests significant contraction would not be appropriate. The expansion or contraction of centre boundaries should be considered on a centre by centre basis.
- 7.46 The extension of centre boundaries should only be necessary where there are existing retail/town centre uses, just outside the centre boundary, that are worthy of future protection. The contraction of centre boundaries could be considered where there is a concentration of non-town centre uses on the periphery of centres e.g. residential gaps in frontages or a concentration of vacant shop units.

Controlling the mix of uses

- 7.47 The ability to control the mix of uses within centres and frontages has changed significantly since the previous development plans were adopted. Current and future market trends; the relatively low retail floorspace medium-term capacity projections; and changes to the NPPF and the UCO; indicate a more flexible approach to shop frontage policies and the mix of uses within centres should be considered.
- 7.48 A balanced approach is recommended that recognises the need to maintain and enhance each centre's retail role, as well as introducing new non-retail uses including activities in the early evening and night-time economy. However, the floorspace projections suggest

there is still a need to retain and encourage new retail uses previously categorised as Class A1 uses within the town and local shopping centres. However, changes to the Use Classes Order (UCO) and Permitted Development Rights (PDR) will restrict the future policy approach.

- 7.49 Considering changes to the UCO and PDR, restrictive policies may be unsound and unimplementable for existing premises. The UCO/PDR changes prevent a more restrictive approach, but the introduction of Article 4 directions can be considered e.g. to remove permitted changes of use from Class E to residential (Class MA). However, Article 4 directions cannot prevent movement within the same use class i.e., new Class E. Article 4 directions to restrict PDR may be most appropriate in centres with a low vacancy rate and high combined retail and food/beverage floorspace projections i.e. where there is an imbalance between supply and demand.
- 7.50 In some circumstances the introduction of restrictive shop frontage policies or Article 4 directions could be inappropriate e.g. in areas with a high level of vacancies and where an increase in vacant units could harm the vitality and viability of the centre. Demand from retail and, recently food/beverage, occupiers has reduced and the updated floorspace projections are much lower than those set out in previous studies, particularly comparison goods retail. The continuation of the previous policy approaches could be undermined and hampered by the UCO/PDR changes.
- 7.51 Non-Class E uses including pubs, bars, hot food takeaways and other Sui Generis uses can be assessed against criteria-based policies e.g. relating to breaks in active frontages, amenity issues (noise/smells), impact on the nature and character of the retail frontages. Betting shops and hot food takeaways are Sui Generis uses that can still be controlled by policy, and this is not affected by changes to the Use Classes Order or Permitted Development Rights. Other non-Class E uses at ground floor level can be controlled within the designated frontages, where necessary.
- 7.52 Notwithstanding the reduced controls, the mix of uses within Use Class E can still be controlled via planning conditions or legal agreements, where planning permission is required i.e., where there is a change of use requiring planning permission, redevelopment or new development is proposed, in the same way planning conditions/legal agreements were previously used to control movement usually permitted within the former Class A uses. This approach could be used to control the mix of ground floor uses on development site allocations. Planning policy could seek to control the mix of uses within Class E for new development where planning conditions can be introduced restricting movement within the use class.
- 7.53 Development Management Policy DM32 (Office Development) seeks to control the loss of office accommodation in town centres due to redevelopment or changes of use. Policy DM36 (Primary Shopping Frontages) seeks to restrict the amount of non-retail street level frontage to not more than 25% or a concentration of not more than three units. The creation of an inactive frontage during the day is also restricted. Policy DM37 (Secondary and Designated Shopping Frontages) provides more flexibility where up to 50% non-retail frontage is permitted. Policy DM38 (Other Town Centre Frontages and Neighbourhood Parades) requires a window display or other frontage appropriate to the centre to be provided for non-A class uses. Policy DM39 (Vacant Shops in Town Centres) also provides more flexibility in town centres with a vacancy rate exceeding 20% for a continue period of two years or more.

- 7.54 Existing policy seeks to concentrate and protect retail uses (previously Class A1) within the primary shopping frontages, whilst allowing a more flexible approach in secondary shopping frontages and other parts of the town centres. These frontage designations need to be reconsidered in the context of the trends and changes outlined in Section 2; the centre health checks in Appendix 5 and the updated floorspace capacity projections. Adopting the same approach across all centres also needs to be assessed.
- 7.55 The 2023 land use information for the main centres in the Borough in 2023 indicate the proportion of non-retail units has increased since 2016 in most centres. The 25% and 50% maximum threshold for non-retail uses is likely to have been breached in many areas.
- 7.56 There are three broad policy approaches that could be considered for future policy, as follows:
1. retaining the existing approach to control the mix of uses as currently set out in adopted policy;
 2. relaxing shop frontages policies to allow a more flexible approach to enable more non-town centre uses. This would usually involve reducing the PSF and/or introducing more flexibility; or
 3. a laissez-faire approach that does not seek to protect retail and town centre uses, on the basis that the market will determine the appropriate mix of uses within town centres.
- 7.57 As indicated above, the threshold for non-retail uses is likely to have been breached in many centres, and therefore retaining current policy restrictions does not appear to be justified. Considering current and likely future market trends, the revised floorspace capacity projections, and changes to the UCO and permitted development rights described earlier, Option 1 is unsound and an unimplementable approach.
- 7.58 The UCO/PDR changes prevent a more restrictive approach, recognising that the introduction of Article 4 directions can only remove permitted GPDO changes of uses but not movement within the same use class i.e. new Class E. The continuation of the current adopted policy approach (Option 1) will also be undermined and hampered by the UCO/PDR changes. Furthermore, this approach could be inappropriate as it could lead to an increase in vacant units. Demand from retail occupiers has reduced and the updated comparison and convenience goods floorspace projections are much lower than previous projections. As a result of these recent changes and the current land use mix in most centres, Options 2 or 3 now appear to be the most appropriate approaches available in LB Harrow.
- 7.59 Future policy could seek to encourage all Class E uses within centre boundaries and potentially other community uses (now Classes F.1 and F.2). The wording of future policy could be amended to refer to Class E uses within primary shopping frontages. This could include some other main town centre uses not previously permitted at ground floor level e.g. offices and leisure uses. Non-Class E uses including pubs, bars, hot food takeaways and other Sui Generis uses could be assessed against a criteria-based policy relating to breaks in active frontages, amenity issues (noise/smells), impact on the nature and character of the retail frontages. All other non-Class E uses at ground floor level could be controlled within the PSF or all frontages, but again this would be undermined by PDR changes outside of conservation areas.
- 7.60 If Option 2 is adopted then the policy could apply to the primary shopping frontages only, still allowing significant flexibility in the secondary shopping frontages. Alternatively, a more flexible approach could be adopted that allows any main town centre use at ground floor level including Class E, Class F.1, F.2, Class C1 (hotels/guest houses) and other main

town centre uses categorised as Sui Generis (e.g. pubs/bars and takeaways). This approach would not prevent the loss of town centre uses to residential and other non-town centre uses through the PDR changes.

8.0 Conclusions

8.1 This section draws together the analysis set out in previous sections and provides strategic recommendations for Harrow Borough. It explores how the identified growth across could be accommodated.

Market trends

8.2 Investment within the UK commercial property market was subdued in early 2023, largely owing to higher interest rates. The trends affecting town centres are not new. Most town centres have changed and diversified. The food/beverage, leisure and non-retail service sectors have to some extent been successful in occupying space no longer attractive to retail tenants.

8.3 The most recent trends suggest vacancy rates have been slow to recover in weaker centres, and many high street retailers are still experiencing difficulties. The national shop vacancy rate has increased to over 14% and a cautious approach to future development needs is required. Despite these trends, the shop vacancy rate in LB Harrow remains relatively low, below the UK average.

8.4 Shopping behaviour will continue to change, and town centres will need to respond. All centres will need to focus on their advantages over other forms of multi-channel shopping, for example, using the internet as an extended shop window, click-and-collect facilities, and providing a combined retail, leisure and cultural experience.

8.5 Demand for office space has continued to decline since the pandemic, while availability of leasable space has risen in tandem. Concentration of demand in prime office spaces has led to expectations of rising rents in this segment, in parallel with an anticipated fall in rents for secondary stock.

8.6 These national trends are mirrored within the London office market, which has seen minor improvements in leasing figures in Q2 2023 after weak performance in the first half of the year. Vacancy in the capital has reached a 20-year high and, as observed nationally, demand is currently concentrated within the high-quality segment, while rents for older, poorer-quality stock have fallen.

8.7 Within the local office market in Harrow, the bulk of take-up of office space in the last decade has been within premises under 250 sq.m. As such, the majority of available floorspace is within units of over 1,000 sq.m. Comparison of available supply in Harrow with average annual take-up figures from the past five and 10 years suggests that there is currently between 1.05 and 1.61 years of available supply.

8.8 Vacancy rates in Harrow have been below the London average since 2017; vacancy is currently at 4.8% in Harrow compared to 9.2% in the wider London market. Vacancy is projected to rise over the next five years, however, due to limited construction activity and a trend of negative net absorption in recent years, it is anticipated that this increase in vacancy is due to falling demand.

8.9 The market rents attracted by office space in Harrow are significantly below the London average; this differential has remained broadly constant over the last decade. This likely reflects the relatively poor quality of office space in Harrow, in addition to an ageing stock

of premises. Just 7.2% of office floorspace was rated 4-5 stars by CoStar, compared to 57.2% of the overall office space in London. This presents a longer-term challenge around how the Borough's office stock can be renewed and be better able to meet modern business needs whilst vacancy levels are low and wider market performance is weak.

Harrow Borough's needs

Retail and leisure

- 8.10 The NPPF states that local planning authorities should assess the needs for land or floorspace for retail and leisure development over the plan period. When planning for growth in their town centres, local planning authorities should allocate a range of suitable sites to meet the scale and type of retail development needed. It is important that the needs for retail and other main town centre uses are met in full and not compromised by limited site availability.
- 8.11 The total projection to 2041 is 13,900 sq.m gross which is less than the current amount of vacant shop floorspace in the Borough (over 21,000 sq.m gross). Based on a reasonable reduction in shop vacancy rates, reoccupied space could in theory accommodate the projected need to 2036 (about 8,500 sq.m gross). However, there is likely to be a shift from comparison goods retail space to convenience goods retail, food/beverage and leisure/cultural uses, with vacant shop premises also converting to these uses. Not all vacant shop units will be suitable for conversion to leisure/cultural uses, therefore new development may be required to accommodate some new uses.
- 8.12 Long term floorspace capacity forecasts beyond 10 years are susceptible to unforeseen circumstances. Growth forecasts for expenditure and turnover are particularly uncertain and need to be carefully monitored, including the continued growth in home/internet shopping. Long term projections must be treated with caution and kept under review, particularly projections after 2036.
- 8.13 The projected proportional increase in home shopping is likely to lead to an increase in demand for local distribution hubs and parcel lockers. These types of small scale distribution uses could be supported in town centres and on balance should help to reduce overall levels of traffic in the Borough.
- 8.14 Future planning policy within the New Local Plan should seek to ensure new mixed use developments are flexible. Policy criteria relating to good design and the configuration of buildings should seek to ensure building floorplate can be readily merge and/or sub-divided, offering maximum flexibility to respond to changing operator requirements over the plan period.
- 8.15 The capacity projections in this update suggest there is no pressing requirement to allocate sites for major retail development to accommodate projected growth over the next 10 years. The priority in the short to medium term will be the reoccupation of vacant shop units. However, the future strategy should be flexible to respond to new investment that cannot be accommodated in vacant units. Some redevelopment, refurbishment and expansion may be required in addition to the reoccupation of vacant units, ideally within town centres to accommodate future investment opportunities.
- 8.16 Residents in LB Harrow have reasonable access to a range of commercial leisure and entertainment facilities within the Borough and in the surrounding areas. Facilities in Central London are accessible. There may be potential to provide about 5,000 sq.m of leisure, entertainment and cultural floorspace up to 2036, which could include:

- a small boutique cinema (2-3 screens);
- 2 large or 4 medium sized health and fitness facilities (about 210 new fitness stations);
- new leisure innovations; and
- small scale tourist attractions.

8.17 The development strategy should be flexible to respond to emerging opportunities for new leisure, entertainment and tourist related facilities.

Employment Land Demand & Supply

8.18 Demand for office space in LB Harrow has weakened since the production of the original EDNS in 2017. Given the changes to the office market caused by the Covid-19 pandemic, both in terms of general demand levels but also a greater focus within the market on higher quality space in prime locations (to attract and retain staff), this is to be expected. Annual net absorption figures have been consistently negative over the past five years – a trend projected to continue in the period to 2028.

8.19 As with other parts of outer London, low demand has fuelled the conversion of office space in Harrow to residential dwellings through Permitted Development Rights, which has effectively prevented a potential build-up of excess supply. However, some conversions of Grade A units have occurred, putting further pressure on this segment of the market as well.

8.20 Since the 2017 EDNS, the Borough has experienced a net loss of 83,000 sq.m of class B1 office floorspace. Net deliveries are expected to continue to be negative up to 2028, while extant permissions also result in a net loss of office floorspace, implying a projected loss of 0.6 hectares of land. However, when currently available land (0.9 hectares) is taken into consideration, the overall supply is assessed to be in the region of 0.3 hectares.

8.21 Overall, it is likely that there is surplus supply of office employment land over the period to 2036, given a reduced demand outlook, as indicated by persistently negative net absorption, and a significant stock of available employment land. If this excess supply materialises, it could place downward pressure on rents in the Harrow office market and/or increase vacancy levels which in turn might lead to further office-to-residential conversions through Permitted Development Rights. This would create a movement towards an equilibrium position between supply and demand in the office market – and perhaps more importantly – could see substitution of older outdated stock with newer, modern premises, by encouraging new mixed use development.

Implications for future policy

Hierarchy of centres

8.22 The hierarchy of centres should be identified in the New Local Plan to ensure the vitality and viability of town and local centres is maintained and enhanced. Designated centres remain the expected focus for retail, leisure and other main town centre uses. The continued classification of centres within the hierarchy is important in identifying which centres are relevant in the search for sequential sites.

8.23 Harrow is the largest and dominant town centre in the Borough, consistent with its designation as a Metropolitan Centre in the London Plan. The designated District Centres all continue to play an important role as a focal point in their respective areas. It is

appropriate to continue to differentiate these District Centre from the smaller Local Centres.

- 8.24 The relatively low floorspace capacity projections, the number of vacant shop units and assessment of potential development opportunity sites in centres suggest there is no need to extend the centre boundaries to accommodate future growth.
- 8.25 The network of main and local centres should continue to be protected and enhanced to ensure appropriate accessibility to important facilities for all sections of the community and to ensure sustainable shopping patterns.

Impact and sequential tests

- 8.26 Future Local Plan policy should set out the sequential and impact tests and which designated centres need to be considered. The NPPF minimum threshold of 2,500 sq.m gross may be an inappropriate threshold for LB Harrow because this scale of development would exceed the overall long-term retail/food beverage projections for all zones in the Borough.
- 8.27 The Council should consider reducing the impact threshold to 400 sq.m gross consistent with the Sunday trading threshold. This threshold should apply to retail and leisure uses combined, also combined floorspace across different phases of development. All retail and leisure developments over 400 sq.m gross (combined) proposed outside or on the edge of designated Metropolitan, District and Local Centres should be required to prepare a proportionate impact assessment, including retail and leisure uses included within mixed use allocations. Policy should indicate that impact assessments should be proportionate to the scale of development proposed. The use of planning conditions to restrict the mix of Class E uses within new development will need to be considered on a case-by-case basis.
- 8.28 The continued identification of town centre boundaries is important when applying the sequential approach. New Local Plan Policy regarding edge and out-of-centre development should be consistent with the NPPF in terms of the sequential and impact tests and should be worded to refer to the centre boundaries and primary shopping areas (PSA). The need for separate town centre and PSA boundaries within District Centre should be considered. A separate PSA may only be appropriate in Harrow Metropolitan Centre but not the District Centres where a single centre boundary should suffice for sequential test purposes.
- 8.29 All main town centre uses located outside or on the edge of designated Metropolitan, District and Local Centres should be required to consider the sequential test. Some proposed main town centre uses may have market and locational requirements that cannot be met within designated centres. Where this requirement is suggested, robust justification must be provided by the applicant.

Controlling the mix of uses

- 8.30 Existing policy seeks to concentrate and protect retail uses within the Primary Shopping Frontages, whilst allowing a more flexible approach in Secondary Shopping Frontages. The floorspace capacity projections suggest there is a need for a mix of town centre uses to maintain the vitality and viability of centres. Future policy should provide enough flexibility to allow improvements to non-retail uses in appropriate locations that does not impact on nearby residential uses. The continuation of restrictive shop frontage policies may be inappropriate and unimplementable due to changes to the Use Classes Order (UCO) and Permitted Development Rights (PDR).

- 8.31 Future policy could seek to encourage all Class E uses within centre boundaries and potentially other community uses (now Classes F.1 and F.2). The wording of future policy could be amended to refer to Class E uses within PSF. This could include some other main town centre uses not previously permitted at ground floor level e.g. offices and leisure uses. Non-Class E uses including pubs, bars, hot food takeaways and other Sui Generis uses could be assessed against a criteria-based policy relating to breaks in active frontages, amenity issues (noise/smells), impact on the nature and character of the retail frontages. Alternatively, a more flexible approach could be adopted that allows any main town centre use at ground floor level including Class E, Class F.1, F.2, Class C1 (hotels/guest houses) and other main town centre uses categorised as Sui Generis (e.g. pubs/bars and takeaways), subject to acceptable amenity impacts. However, this approach would not prevent the loss of town centre uses to residential and other non-town centre uses through the PDR changes.

Appendix 1 Study area

Table 1 Study Area Zones and Wards (2022)

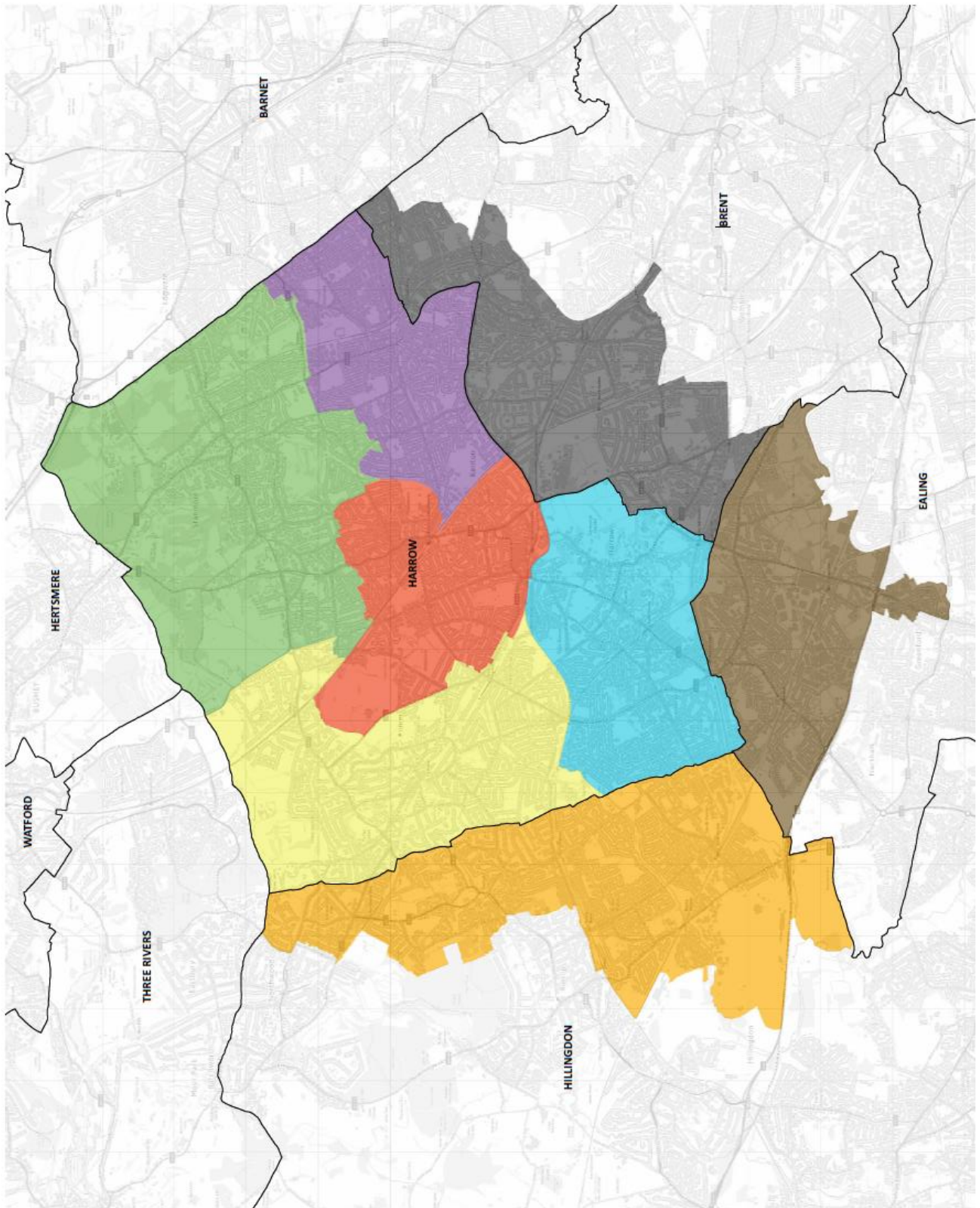
Zone	Wards
1. Harrow Central	E05013546 - Greenhill E05013550 - Headstone E05013553 - Marlborough E05013561 – Wealdstone North E05013562 - Wealdstone South
2. Harrow Southwest	E05013547 - Harrow on the Hill E05013557 - Rayners Lane E05013558 - Roxbourne E05013559 - Roxeth E05013563 - West Harrow
3. Harrow Northwest	E05013549 - Hatch End E05013554 - North Harrow E05013555 - Pinner E05013556 - Pinner South
4. Harrow Northeast	E05013542 - Belmont E05013543 - Canons E05013548 - Harrow Weald E05013560 - Stanmore
5. Harrow Southeast	E05013544 – Centenary E05013545 - Edgware E05013551 - Kenton East E05013552 - Kenton West
6. Brent North	E05013502 - Kenton E05013505 - Northwick Park E05013506 - Preston E05013508 - Queensbury E05013511 - Sudbury
7. Ealing North	E05013518 - Central Greenford E05013528 - North Greenford E05013531 - Northolt Mandeville
8. Hillingdon Northeast	E05013567 - Eastcote E05013575 - Northwood Hills E05013578 - Ruislip Manor E05013579 - South Ruislip

Key

 Local authority boundary

Zones

-  Zone 1 - Harrow Central
-  Zone 2 - Harrow Southwest
-  Zone 3 - Harrow Northwest
-  Zone 4 - Harrow Northeast
-  Zone 5 - Harrow Southeast
-  Zone 6 - Brent North
-  Zone 7 - Ealing North
-  Zone 8 - Hillingdon Northeast



Appendix 2 Audit of Shopping Centres

A. HARROW TOWN CENTRE

Harrow Town Centre is located to the south of the Borough and is designated as a Metropolitan Centre in the London Plan. It is the largest centre in the Borough in terms of total floorspace of units, with just under 97,300 sq.m gross commercial floorspace of which 80.3% is retail. However, the amount of retail floorspace has reduced by about 20% since 2017. The defined primary frontage comprises St Ann's Shopping Centre, St George's Shopping Centre, St Ann's Road and parts of Station Road closest to the junction of St Ann's Road. The secondary frontage comprises parts of Station Road north towards the Tesco superstore and south towards the railway line, as well as parts of Central Parade, College Road and outside the Harrow-on-the-Hill train station.

Harrow's key roles include:

- **convenience shopping** – including four large convenience stores comprising Tesco, Morrison's, Lidl and the Marks & Spencer Food Hall. These facilities serve main food and grocery shopping trips in addition to basket/top-up food shopping trips. There are also several smaller convenience stores, international food stores and newsagents.
- **comparison shopping** - a good provision of higher order (window-shopping) comparison outlets, and in particular a relatively good provision of clothes/footwear stores, consistent with its Metropolitan Centre function. There are a selection of national multiple comparison retailers. There are also a small number of charity/second-hand shops, as well as independent retailers on the peripheral areas of the centre.
- **food/beverage** - a good provision for food and beverage outlets, especially restaurants/cafés and fast food, with a variety of chain franchises.
- **services** – including banks/building societies, financial/professional consultants, hairdressers, beauty salons, travel agents, estate agents, betting agents, dry cleaners and a funeral parlour;
- **leisure/entertainment** – including a cinema, theatre, climbing centre and gyms; and
- **community facilities** – including churches, colleges and a recreational ground.

The diversity of uses present in Harrow Town Centre in terms of number and percentage of units is shown in Table A.1. This is derived from the Council's surveys of the town centre in June 2016 and July 2023. The results are compared to this year's national average from Experian Goad UK data.

Harrow Town Centre has a total of 347 commercial use units, more than double the size of next largest centre in the Borough. The number of vacant units (41) in Harrow is now significantly above the pre-Covid-19 pandemic position (15 in 2016) and the centre has the highest vacancy rate in the Borough. However, the vacancy rate is still lower than the national average, which is still recovering from effects of the economic turbulence brought on by the pandemic and Brexit, as well as shifting trends in consumer behaviour.

Affirming this increase in vacant units is the decline of comparison goods retail shops which have dropped since 2016, from 33.9% of all units to 21.9%. Harrow has a lower proportion of comparison shops than the national average of 28.8%, whilst its proportion of convenience shops has remained stable and relatively on par with the national average.

Table A.1 Harrow Town Centre Use Class Mix by Unit

Type of Unit	Units 2016	Units 2023	% of Total Units		
			Harrow 2016	Harrow 2023	UK Average 2023
Comparison Retail	106	76	33.9	21.9	28.8
Convenience Retail	37	37	11.8	10.7	9.8
Financial/Professional Services	47	48	15.0	13.8	8.8
Restaurants/Cafés	52	53	16.6	15.3	10.4
Pubs/Bars	6	6	1.9	1.7	5.1
Hot Food Takeaways	10	35	3.2	10.1	6.4
Other Services	40	51	12.8	14.7	16.1
Vacant	15	41	4.8	11.8	14.5
Total	313	347	100.0	100.0	100.0

Source: Harrow Borough Council shop frontage surveys June 2016 and July 2023; Experian Goad UK town centres averages data.

Despite the large reduction in comparison goods shops, Harrow Town Centre still has a reasonable selection of comparison shops (76) reflecting its size and role in the shopping hierarchy. Harrow has a choice of clothing and fashion shops, with national multiple retailers and some independent shops. There is a fair representation and mix of mid-market high-street national multiple comparison retailers present, including:

Boots, Specsavers, Vision Express, The Fragrance Shop, The Perfume Shop, Marks & Spencer, Poundland, Holland & Barrett, H&M, Moss Bros, New Look, Next, Primark, Claire's, H Samuel, Pandora, Clarks, Deichmann, Foot Locker, Shoe Zone, JD Sports, Sports Direct, TK Maxx, Miniso, Robert Dyas, Waterstone's, WH Smith, Smiggle, Ryman Stationery, Card Factory, The Works, The Body Shop, Savers, Sony Centre, Three, EE, O2, Vodafone and B&Q.

Harrow's food and beverage offer has stayed consistent with almost no change to the number of restaurants/cafés and pubs/bars. The proportion of restaurants/cafés remains higher than the national average, but the proportion of pubs/bars is much lower than average. Harrow has seen a major rise in hot food takeaways and other non-retail service outlets, both higher than the national average. Although the rate of financial and professional services fell from 2016, the proportion is still higher than the UK average.

This trend generally reflects the national picture. With the increase in online shopping, town centres need to offer more than just retail shopping to attract customers. Customers increasingly combine shopping together with eating, drinking and other leisure activities, as a day out. Harrow town centre to some extent successfully adapted to this trend and has maintained a satisfactory level of vitality and viability.

A key issue for Harrow in the future will be its ability to retain its comparison retail offer and improve leisure and entertainment uses, particularly in the night-time economy such as pubs/bars.

There is a selection of restaurants and café chains present within Harrow Town Centre, which support the two shopping centres and cinema. This provision suggests the evening economy is reasonably strong. The franchise restaurants/café and fast food chains available include:

Caffé Nero, Starbucks Coffee, Costa Coffee, Pret a Manger, Chaiiwala, T4 Tea for U, Mooboo Bubble Tea, Cupp Bubble Tea, Goodfellas, Nando's, Roosters Piri Piri, Prezzo, Pizza Express, Manoush, Royal China, Taste of Lahore, Kokoro, Domino's, Pizza Hut, Tortilla, Subway, Burger King, KFC, McDonald's, Taco Bell, Tex Ann, Cheat Meals, Wok & Go, Greggs, Wenzel's, Krispy Kreme, Baskin Robbins and Ben & Jerry's.

Harrow town centre has a wide range of non-retail service uses (99 in total) with a choice of service providers, including: a post office; barbers; hair, nail and beauty salons; acupuncture/massage health therapy centres; a tattoo/piercing studio; laser treatment clinics; banks and building societies; money exchangers; accountants; financial advisors; solicitors; IT professional services; dry cleaners; key/shoe repair shops; an electrical/electronics repair shop; a photography studio; a funeral directors; travel agencies; estate agencies; care service agencies; betting shops; adult gaming centres/arcades; and an internet café.

Most of the main high street banks and building societies are represented including Santander, Barclays, Halifax, HSBC, Lloyds, Nationwide, NatWest, Skipton Building Society, Yorkshire Building Society, Metro Bank, TSB and Virgin Money.

In addition to these service uses, Harrow is represented by a limited range of cultural, leisure and entertainment uses, such as a Vue cinema, Puttstars indoor mini golf, and gyms including The Gym Group and Buzz Gym.

B. PINNER DISTRICT CENTRE

Pinner is located to the north-west of Harrow Borough and is designated as a District Centre in the London Plan. It is the second largest centre in the Borough with around 24,600 sq.m gross commercial floorspace of which 72.2% is retail. The defined primary shopping frontage runs along the southern ends of High Street and Bridge Street including Red Lion Parade, and parts of Barters Walk, Bishops Walk, Love Lane and Beaumont Mews. The secondary frontage runs along the rest of High Street and Bridge Street, and parts of Marsh Road, Love Lane and Station Approach. Pinner's key roles include:

- **convenience shopping** - a good range of convenience traders serving food and grocery shopping needs including a large Sainsbury's store, Marks & Spencer Food Hall and a Lidl, as well as small independent shops.
- **comparison shopping** – a range of independent comparison shops serving higher order shopping needs in addition to a small amount of units serving everyday shopping needs including Boots and WH Smith. There is a relatively good provision of chemists and opticians, in addition to a high proportion of charity shops.
- **food/beverage** - a good food/beverage offer and in particular restaurants/cafés, including a coffee shop chains.
- **services** – including a large provision of hairdressers/barbers and beauticians and estate agents. Other uses include launderettes, dry cleaners, travel agents, health centres, a dog grooming parlour and a photo printing shop.

The diversity of uses present within the centre boundary in terms of number and percentage of units is shown in Table B.1. This is derived from the Council's survey of the town centre in June 2016 and July 2023. The results are compared to this year's national average from Experian Goad UK data.

Table B.1 Pinner District Centre Use Class Mix by Unit

Type of Unit	Units 2016	Units 2023	% of Total Units		
			Pinner 2016	Pinner 2023	UK Average 2023
Comparison Retail	46	41	32.6	26.5	28.8
Convenience Retail	16	14	11.3	9.0	9.8
Financial/Professional Services	21	19	14.9	12.3	8.8
Restaurants/Cafés	17	26	12.1	16.8	10.4
Pubs/Bars	2	3	1.4	1.9	5.1
Hot Food Takeaways	4	6	2.8	3.9	6.4
Other Services	28	38	19.9	24.5	16.1
Vacant	7	8	5.0	5.2	14.5
Total	141	155	100.0	100.0	100.0

Source: Harrow Borough Council shop frontage surveys June 2016 and July 2023; Experian Goad UK town centres averages data.

Pinner District Centre has 155 commercial use units. The number of vacant units in Pinner has only increased by one since 2016, and the vacancy rate is much lower than the national average. However, the number of comparison goods shops has decreased, which is similar to trends in the other centres in the Borough as well as nationally. Pinner has the highest proportion of comparison good shops

compared to other centres in the Borough, but Pinner has a slightly lower proportion of comparison shops than the national average. The proportion of convenience shops has reduced since 2016 and is the lowest rate in the Borough but remains on par with the national average.

Despite the reduction in comparison retail, Pinner still has a reasonable selection of comparison shops (41) when compared with other district centres in the Borough. These comparison shops are predominantly independent traders and charity outlets, with a good representation of chemists/drugstores and opticians (12). There is a small representation of national multiple comparison retailers present, including Boots, Specsavers, Clarks and WH Smith.

In terms of Pinner's food and beverage offer, the centre has a strong provision of restaurants/cafés, which has increased since 2016 and at a much higher proportion than the national average. This suggests the evening economy is strong in the centre. The chain cafés include Starbucks Coffee, Costa Coffee and Caffé Nero, although most restaurants are independent outlets. The provision of pubs/bars and takeaways is more limited. Pinner's proportion of takeaways is the Borough's lowest and is significantly below the national average.

While financial/professional service provision has decreased in Pinner and other non-retail service uses has increased since 2016, both averages are higher than the national figures. Pinner has a strong range of non-retail service uses, with a choice of service providers, including:

- building society;
- 3 financial accountants/consultants;
- 2 solicitors' offices;
- 6 barbers;
- 20 hair and beauty salons;
- 2 acupuncture/massage health therapy centres;
- 5 launderettes and dry cleaners;
- 11 estate agents;
- 2 travel agents;
- 2 funeral directors;
- dog grooming parlour;
- photo and printing studio; and
- car service.

Of note since 2016, banks in Pinner District Centre have all vacated their premises and the centre is currently left with just one building society, Nationwide. This is consistent with the rest of the Borough, where most banks and building societies have closed branches since 2016.

Regarding leisure and entertainment provision in Pinner, there is only one gym, Better Gym.

C. WEALDSTONE DISTRICT CENTRE

Wealdstone is centrally located within Harrow Borough and is defined as a District Centre in the London Plan. It is the third largest centre in the Borough with around 20,100 sq.m gross commercial floorspace of which 73.9% is retail. The primary shopping frontage runs along the majority of the High Street from the junction with Grant Road to the north to Palmerston Road to the south. The secondary frontage extends to the north and south of the primary shopping frontage and includes some retail units on Headstone Drive and Canning Road. Wealdstone's key roles include:

- **convenience shopping** - Asda and Iceland stores which serve main food and grocery shopping trips as well as top-up shopping role for residents. These stores are supported by numerous small independents including ethnic/international food shops.
- **comparison shopping** - a range of lower order (day-to-day products) comparison shops which are predominantly independent traders and discount retailers.
- **food/beverage** - a good food/beverage offer especially for restaurants/cafés and takeaways, mostly a variety of independents.
- **services** – including a post office, barbers, hair/beauty salons, estate agents, betting shops and a slots casino, phone/computer repairs, tailors and launderettes, but no banks or building societies; and
- **community facilities** – including health centres, tuition and training centres, a community centre, public library and police station.

The diversity of uses present within the centre boundary in terms of number and percentage of units is shown in Table C.1. This is derived from the Council's survey of the town centre in June 2016 and July 2023. The results are compared to this year's national average from Experian Goad UK data.

Table C.1 Wealdstone District Centre Use Class Mix by Unit

Type of Unit	Units 2016	Units 2023	% of Total Units		
			Wealdstone 2016	Wealdstone 2023	UK Average 2023
Comparison Retail	29	24	19.3	14.8	28.8
Convenience Retail	28	30	18.7	18.5	9.8
Financial/Professional Services	24	18	16.0	11.1	8.8
Restaurants/Cafés	17	24	11.3	14.8	10.4
Pubs/Bars	5	3	3.3	1.9	5.1
Hot Food Takeaways	8	15	5.3	9.3	6.4
Other Services	25	35	16.7	21.6	16.1
Vacant	14	13	9.3	8.0	14.5
Total	150	162	100.0	100.0	100.0

Source: Harrow Borough Council shop frontage surveys June 2016 and July 2023; Experian Goad UK town centres averages data.

Wealdstone has a total of 162 commercial units. Wealdstone has the second highest vacancy rate (8.0%) in the Borough after Harrow, although the rate is still well below the national average. Wealdstone has the lowest proportion of comparison shops in the Borough, about half of the national average, but a higher proportion of convenience goods shops, which is almost double the national average.

Wealdstone has a small selection of comparison shops (24). These comparison shops are predominantly independent traders with strong representation from the discount sector and a reasonable representation of fashion and clothing stores. There is limited representation from national multiple comparison retailers present, including Boots, Poundstretcher, Poundland, Pep & Co and Specsavers.

There is a good selection of restaurants/cafés and takeaways, which are predominantly small independent outlets. The chain outlets available include Costa Coffee, Sundaes Gelato and Subway and Sam's Chicken.

Wealdstone has a good range of financial/professional and other non-retail service uses, with a choice of non-retail service providers within the centre, including:

- 16 barbers, hairdressers and beauty parlours;
- Chinese health centre;
- post office;
- 3 financial accountants/services;
- 3 solicitors' offices;
- insurance broker;
- money exchanger
- travel agent;
- 8 estate agents;
- 3 laundrettes and dry cleaners;
- 2 tailors;
- 4 betting shops;
- slots casino;
- funeral director;
- 3 car rental/servicing and minicab services;
- 3 computer/phone services and internet cafés; and
- banqueting supplies service.

There are no banks or building societies represented in Wealdstone.

For leisure and entertainment, Wealdstone has two gyms – Anytime Fitness and The Gym Group. The Wealdstone Community Centre and Library is also within the centre.

D. KENTON DISTRICT CENTRE

Kenton is designated a District Centre in the London Plan. It is a linear centre situated to the east of Harrow Town Centre on the southern boundary of Harrow Borough immediately adjacent to Brent Borough. It is the fifth largest centre in the Borough with around 17,600 sq.m gross commercial floorspace (only 6,145 sq.m of which is in LB Harrow with the rest located in LB Brent) of which 83.9% is retail, but this figure includes a large Sainsbury's superstore (6,750 sq.m or 45.7% of the total retail floorspace). The commercial units to the north of Kenton Road, the A4006, are in LB Harrow whereas the commercial units to the south of Kenton Road are in LB Brent. All the primary shopping frontage is in the LB Brent side of the centre, comprising the Sainsbury's and the southside units of Kenton Road from Nash Way to Upton Gardens. The secondary shopping frontage includes the northside units of Kenton Road from Carlton Avenue up to Willowcourt Avenue and the southside units of Kenton Road from Rushout Avenue to Kenton Bridge, as well as a unit on Draycott Avenue. The district centre is assessed as a whole in this audit.

Kenton's key roles include:

- **convenience shopping** - the centre is anchored by a large Sainsbury's superstore. Other provision is provided by a smaller Budgens and other independent traders including those that specialise in ethnic foods.
- **comparison shopping** - a basic range of lower order (day-to-day products) comparison shops, primarily serving local needs.
- **services** – predominantly estate agents, hairdressers and beauty parlours.

The diversity of uses present within the centre boundary in terms of number and percentage of units is shown in Table D.1. This is derived from the Council's survey of the town centre in June 2016 and July 2023. The results are compared to this year's national average from Experian Goad UK data.

Table D.1 Kenton District Centre Use Class Mix by Unit

Type of Unit	Units 2016	Units 2023	% of Total Units		
			Kenton 2016	Kenton 2023	UK Average 2023
Comparison Retail	22	18	26.2	20.0	28.8
Convenience Retail	12	14	14.3	15.6	9.8
Financial/Professional Services	16	22	19.0	24.4	8.8
Restaurants/Cafés	7	10	8.3	11.1	10.4
Pubs/Bars	2	1	2.4	1.1	5.1
Hot Food Takeaways	5	4	6.0	4.4	6.4
Other Non-retail Services	16	16	19.0	17.8	16.1
Vacant	4	5	4.8	5.6	14.5
Total	84	90	100.0	100.0	100.0

Source: Harrow Borough Council shop frontage surveys June 2016 and July 2023; Experian Goad UK town centres averages data.

Kenton has a total of 90 commercial units. The vacancy rate in Kenton is much lower than the national average. Kenton has a low proportion of comparison goods shops when compared to the national average, but a higher proportion of convenience goods shops. The primary focus of the centre is non-

retail services, especially financial/professional services, having the highest proportion for these services in the Borough.

Kenton has a small selection of comparison shops (18). These comparison shops are independent traders. Other than the RSPCA and St Luke's Hospice charity shops, there are no national multiple comparison retailers present.

There is a small selection of restaurants/cafés and takeaways, most of which are independent outlets, as well as a Subway and a Costa Coffee. There is also a Beefeater public house.

Kenton has a more extensive range of non-retail services, including the highest rate of financial/professional services (24.4%) and highest total proportion of other non-retail services (42.2%) in the Borough. There is a choice of service providers, including:

- bank;
- 2 chartered accountants;
- 2 financial advisors;
- insurance broker;
- betting shop;
- 2 law solicitors;
- 2 planning/property services;
- 9 estate agents;
- 2 home care providers;
- funeral director;
- 8 barbers, hair and beauty salons;
- 2 dry cleaners;
- veterinarian;
- money shop and travel agent;
- 2 automobile service shops; and
- clock, watch and jewellery repair shop.

Bank of Baroda is the only bank.

E. STANMORE DISTRICT CENTRE

Stanmore is situated in the north-east of Harrow Borough and is defined as a District Centre in the London Plan. It is the sixth largest centre in the Borough with almost 14,700 sq.m gross commercial floorspace of which 64.4% is retail. The centre is located at the intersection of Church Road, Stanmore Hill and the entirety of The Broadway. The northern part of The Broadway and the Sainsbury's frontage with a few adjacent units on the south of The Broadway is defined as being primary shopping frontage, whilst secondary shopping frontage comprises commercial units on Stanmore Hill up to Ray Gardens and a southern section of The Broadway, as well as units on Church Road up to the junction with Elm Park. Stanmore's key roles include:

- **convenience shopping** - Sainsbury's and Lidl grocery stores, supported by a few specialist food shops.
- **comparison shopping** - a basic range of comparison shops, primarily serving lower order local shopping needs.
- **food/beverage** - a good range of restaurants and cafés including some chain franchises, but no pubs.
- **services** – including a bank and a building society, hair and beauty salons, estate agents and dry cleaners.

The diversity of uses present within the centre boundary in terms of number and percentage of units is shown in Table E.1. This is derived from the Council's survey of the town centre in June 2016 and July 2023. The results are compared to this year's national average from Experian Goad UK data.

Table E.1 Stanmore District Centre Use Class Mix by Unit

Type of Unit	Units 2016	Units 2023	% of Total Units		
			Stanmore 2016	Stanmore 2023	UK Average 2023
Comparison Retail	23	20	30.3	23.0	28.8
Convenience Retail	8	11	10.5	12.6	9.8
Financial/Professional Services	13	14	17.1	16.1	8.8
Restaurants/Cafés	12	15	15.8	17.2	10.4
Pubs/Bars	0	0	0.0	0.0	5.1
Hot Food Takeaways	1	4	1.3	4.6	6.4
Other Non-retail Services	16	19	21.1	21.8	16.1
Vacant	3	4	3.9	4.6	14.5
Total	76	87	100.0	100.0	100.0

Source: Harrow Borough Council shop frontage surveys June 2016 and July 2023; Experian Goad UK town centres averages data.

Stanmore has a total of 87 commercial units. The vacancy rate is much lower than the national average. Stanmore has a slightly lower proportion of comparison shops and a slightly higher proportion of convenience shops than the national averages.

Stanmore has a small selection of comparison shops (20), which are predominantly independent traders. There is a small representation of national multiple comparison retailers, including Boots,

Savers, Card Factory, and Specsavers. There are several charity shops, including St Luke's Hospice and Cancer Research UK.

Stanmore has the highest proportion of restaurants/cafés in the Borough at 17.2%, which is higher than the national average of 10.4%. Stanmore's provision of pubs/bars and takeaways is limited, below the national average, with no pubs/bars and a limited selection of fast food outlets. The chain restaurants/cafés include: Nando's, Pizza Express, Caffé Nero and Costa Coffee, whilst the chain takeaways include Domino's and Subway.

Stanmore has a reasonably extensive range of financial/professional and other non-retail service uses for its size, with a choice of service providers, including:

- 2 banks and building societies;
- 3 law solicitors;
- 9 estate agents;
- travel agent;
- 9 barbers, hair and beauty salons;
- massage parlour;
- 2 betting shops;
- 4 dry cleaners and clothes repair shops;
- post and printing service centre; and
- veterinarian.

The two banks and building societies i.e. Natwest and Nationwide. There is a gym studio.

F. RAYNERS LANE DISTRICT CENTRE

Rayners Lane is situated in the south-west of Harrow Borough and is designated a District Centre in the London Plan. It is the fourth largest centre in the Borough with around 15,400 sq.m gross commercial floorspace of which 67% is retail. The district centre is located in a Y-shape with Rayners Lane Underground Station at the heart, extending towards the south of the station on Alexandra Avenue and towards the north of the station on the forked roads of Imperial Drive and Rayners Lane. The centre also includes Village Way East which circularly links Rayners Lane with Imperial Drive. Primary shopping frontage consists most of the western side of Alexandra Avenue, as well as the southern section of Rayners Lane. Secondary shopping frontage consists most of the eastern side of Alexandra Avenue, as well as parts of Rayners Lane and Village Way East. Rayners Lane's key roles include:

- **convenience shopping** - a Sainsbury's and an Iceland supported by a good variety of independent food stores. There is also a Tesco Express that lies just outside the district centre boundary.
- **comparison shopping** - a limited range of comparison shops, especially selling household goods.
- **food/beverage** - a good range of restaurants/cafés and a variety of takeaways including chain franchises. There is only one public house.
- **services** - including a large range of barbers, hairdressers, beauty parlours, accountants, solicitors, estate agents and taxi services.
- **community facilities** – including education centres, a community centre and a religious centre.

The diversity of uses present within the centre boundary in terms of number and percentage of units is shown in Table F.1. This is derived from the Council's survey of the town centre in June 2016 and July 2023. The results are compared to this year's national average from Experian Goad UK data.

Table F.1 Rayners Lane District Centre Use Class Mix by Unit

Type of Unit	Units 2016	Units 2023	% of Total Units		
			Rayners Lane 2016	Rayners Lane 2023	UK Average 2023
Comparison Retail	31	28	22.1	15.2	28.8
Convenience Retail	28	35	20.0	19.0	9.8
Financial/Professional Services	23	35	16.4	19.0	8.8
Restaurants/Cafés	15	28	10.7	15.2	10.4
Pubs/Bars	2	1	1.4	0.5	5.1
Hot Food Takeaways	9	15	6.4	8.2	6.4
Other Non-retail Services	25	38	17.9	20.7	16.1
Vacant	7	4	5.0	2.2	14.5
Total	140	184	100.0	100.0	100.0

Source: Harrow Borough Council shop frontage surveys June 2016 and July 2023; Experian Goad UK town centres averages data.

Rayners Lane has a total of 184 commercial units, the second highest in the Borough after Harrow Town Centre. The number of vacant units in Stanmore has reduced since 2016. The vacancy rate (2.2%) is very low compared with the national average (14.5%) and is the second lowest in the Borough. Rayners Lane has a low proportion of comparison shops, below the national average and the second lowest rate in the Borough. Meanwhile, the proportion of convenience shops has remained stable since 2016 and is higher than the national average.

Rayners Lane has a small selection of comparison shops (28). These comparison shops are all independent traders aside from the St Luke's Hospice charity shop.

The provision of restaurants/cafés and hot food takeaways is higher than the national average, but there is only one pubs/bars. There is a good selection of restaurants/cafés and takeaways, which are predominantly independent outlets. The chain franchises available include KFC, Chicken Cottage, Cheat Meals, Costa Coffee, Subway, Pizza Hut, Domino's and Tops Pizza.

There is an extensive range of financial/professional and other non-retail service uses, with a choice of service providers, including:

- post office;
- printing shop;
- 5 accountants;
- 7 solicitors;
- care provider service;
- insurance service;
- IT solutions service;
- 2 building/construction engineers;
- plumber;
- 15 estate agents;
- travel agent;
- money shop;
- 3 betting shops;
- slots casino;
- 3 laundrettes and dry cleaners;
- shoe repair shop;
- 20 barbers, hairdressers and beauty therapy salon;
- tattoo studio;
- 4 car, chauffeur and taxi services;
- wedding/party planning service;
- funeral director; and
- import/export service.

There are no banks or building societies represented in Rayners Lane.

G. SOUTH HARROW DISTRICT CENTRE

South Harrow is located to the south and near the southern boundary of Harrow Borough. It is defined as a District Centre in the London Plan. It is the smallest district centre in the Borough with about 11,200 sq.m gross commercial floorspace of which 79.5% is retail. The centre is linear running along Northolt Road, the A312, from South Harrow Underground Station south to the junction with Wyvenhoe Road. The designated primary shopping frontage covers most of the northern/western side of Northolt Road and on the southern/eastern side of the road to the junction with Wargrave Road. The secondary shopping frontage covers the rest of the southern/eastern side of Northolt Road from the junction with Wargrave Road to just past Wyvenhoe Road. South Harrow's key roles include:

- **convenience shopping** - with national supermarket retailers Aldi and Iceland, in addition to independent grocery shops and ethnic food stores. There are also large Waitrose and Asda store just outside the centre.
- **comparison shopping** - a limited range of both higher order (window-shopping) and lower order (day-to-day products) comparison shops, including a small number of national multiple retailers, as well as a concentration of jewellers.
- **services** – including banks and money shops, estate agents and betting offices, and several hairdressers and beauty salons; and
- **community facilities** – including a library, a church and a medical health facilities centre.

The diversity of uses present within the centre boundary in terms of number and percentage of units is shown in Table G.1. This is derived from the Council's survey of the town centre in June 2016 and July 2023. The results are compared to this year's national average from Experian Goad UK data.

Table G.1 South Harrow District Centre Use Class Mix by Unit

Type of Unit	Units 2016	Units 2023	% of Total Units		
			South Harrow 2016	South Harrow 2023	UK Average 2023
Comparison Retail	29	26	29.0	22.8	28.8
Convenience Retail	22	29	22.0	25.4	9.8
Financial/Professional Services	17	13	17.0	11.4	8.8
Restaurants/Cafés	9	11	9.0	9.6	10.4
Pubs/Bars	1	1	1.0	0.9	5.1
Hot Food Takeaways	4	8	4.0	7.0	6.4
Other Non-retail Services	15	25	15.0	21.9	16.1
Vacant	3	1	3.0	0.9	14.5
Total	100	114	100.0	100.0	100.0

Source: Harrow Borough Council shop frontage surveys June 2016 and July 2023; Experian Goad UK town centres averages data.

South Harrow has a total of 114 commercial units. The number of vacant units in South Harrow has reduced since 2016. The vacancy rate (0.9%) is very low compared to the national average (14.5%) and is the lowest of all centres in the Borough.

South Harrow has a lower proportion of comparison shops than the national average, but the convenience retail sector is particularly well- represented, with the highest rate of convenience stores in the Borough and more than double the national average.

South Harrow has a small selection of comparison shops (26). These comparison shops are predominantly independent traders, with a strong representation of jewellers. There are a few national multiple comparison retailers present, including Boots, Specsavers, Savers and Poundland/Pep&Co.

There is a small selection of restaurants/cafés, the lowest rate in the Borough and slightly lower than the UK average. These are mostly small independents. The chain franchise outlets available in South Harrow's food/beverage offer include Nando's, KFC, Sam's Chicken, Subway and Costa Coffee.

South Harrow has a good range of financial/professional and other non-retail service uses, with a choice of providers, including:

- 2 banks;
- 3 bureau de exchange and post/money shops;
- 3 solicitors;
- home care agency;
- 3 estate agents;
- travel agent;
- 3 betting shops;
- 13 barbers, hair and beauty salons;
- photography studio;
- 2 computer/phone services and internet cafés;
- shoe repair shop;
- 2 dry cleaners;
- minicab service;
- party planning service; and
- funeral parlour.

The two banks available include main high street banks such as Lloyds and Barclays.

H. BURNT OAK DISTRICT CENTRE

Burnt Oak is situated at the south-east corner of Harrow Borough immediately adjacent to the boundary with both LB Brent and LB Barnet. It is designated as a District Centre in the London Plan. Only counting the units within LB Harrow, i.e. on the western side of Burnt Oak Broadway (A5), Burnt Oak has under 9,500 sq.m gross commercial floorspace of which 82.3% is retail. The defined primary shopping frontage runs along Burnt Oak Broadway from the junction with Oakleigh Avenue to the junction with Stag Lane, whilst the secondary shopping frontage continues northwards on Burnt Oak Broadway. Less than half of the centre is in LB Harrow, with most of the centre in LB Barnet. This audit assesses uses within Harrow Borough only. Burnt Oak's key roles include:

- **convenience shopping** - an Iceland store in addition to a range of independent food retailers serving mainly basket or top-up shopping.
- **comparison shopping** - a small range of lower order (day-to-day products) comparison goods, which are predominately independent outlets.
- **services** – including hairdressers, beauty parlours and betting shops.

The diversity of uses present within the centre boundary in terms of number and percentage of units is shown in Table H.1. This is derived from the Council's survey of the town centre in June 2016 and July 2023. The results are compared to this year's national average from Experian Goad UK data.

Table H.1 Burnt Oak District Centre Use Class Mix by Unit

Type of Unit	Units 2016	Units 2023	% of Total Units		
			Burnt Oak 2016	Burnt Oak 2023	UK Average 2023
Comparison Retail	13	15	22.0	24.6	28.8
Convenience Retail	15	13	25.4	21.3	9.8
Financial/Professional Services	8	3	13.5	4.9	8.8
Restaurants/Cafés	4	8	6.8	13.1	10.4
Pubs/Bars	0	0	0.0	0.0	5.1
Hot Food Takeaways	4	4	6.8	6.6	6.4
Other Non-retail Services	12	14	20.3	23.0	16.1
Vacant	3	4	5.1	6.6	14.5
Total	59	61	100.0	100.0	100.0

Source: Harrow Borough Council shop frontage surveys June 2016 and July 2023; Experian Goad UK town centres averages data.

Burnt Oak has a total of 61 commercial units (excluding units in LB Barnet). The vacancy rate has increase marginally since 2016 and is lower than the national average. Unlike other centres within the Borough, the number of comparison retail outlets in Burnt Oak has marginally increased since 2016, although the proportion is still below the national average. The number of convenience good shops has however decreased but the proportion still stands significantly higher than the national average.

Burnt Oak has a small selection of comparison shops (15) located within Harrow Borough. There is a small representation of national multiple comparison retailers in the LB Harrow part, including Poundland/Pep&Co, Poundwise, Oxfam and St Luke's Hospice charity shops.

There is a reasonable range of restaurants/cafés and takeaways provision, comparable with the national averages. However, there are no pubs/bars in the LB Harrow part of Burnt Oak.

Burnt Oak has the lowest proportion of financial/professional services in the Borough, at almost half of the national average. There is however a reasonable range of non-retail service uses, considering the size of the centre, including:

- 2 financial accountants/consultants;
- estate agent;
- 3 betting shops;
- slots casino;
- 6 barbers, hair and beauty salons;
- tattoo studio;
- Chinese health centre;
- launderette; and
- funeral parlour.

There are many other services and small independent shops, as well as a gym and an indoor climbing fitness facility, in Burnt Oak centre in the area outside of LB Harrow.

I. NORTH HARROW DISTRICT CENTRE

North Harrow is located to the west of Harrow Town Centre and in the west of the Borough. It is defined a District Centre in the London Plan. It is the seventh largest centre in Harrow Borough with around 9,500 sq.m gross commercial floorspace of which 62.0% is retail. The centre extends northwards on Station Road from North Harrow Underground Station and then continues northwards on Pinner Road. There is no primary shopping frontage shown on the adopted planning policies map; the secondary shopping frontage runs along sections of Station Road from and Pinner Road.

North Harrow's key roles include:

- **convenience shopping** – a Tesco Express and a small number of independent traders.
- **comparison shopping** – a basic range of higher order (window-shopping) and a limited range of lower order (day-to-day products) comparison shopping.
- **food/beverage** – a small selection of restaurants, cafés, pubs and hot food takeaways.
- **services** – including hairdressers, beauticians, estate agents and accountants.
- **community facilities** – including a medical aesthetic clinic, dental practices and gyms.

The diversity of uses present within the centre boundary in terms of number and percentage of units is shown in Table I.1. This is derived from the Council's survey of the town centre in June 2016 and July 2023. The results are compared to this year's national average from Experian Goad UK data.

Table I.1 North Harrow District Centre Use Class Mix by Unit

Type of Unit	Units 2016	Units 2023	% of Total Units		
			North Harrow 2016	North Harrow 2023	UK Average 2023
Comparison Retail	21	20	23.6	21.7	28.8
Convenience Retail	14	15	15.7	16.3	9.8
Financial/Professional Services	13	14	14.6	15.2	8.8
Restaurants/Cafés	8	12	9.0	13.6	10.4
Pubs/Bars	2	2	2.2	2.3	5.1
Hot Food Takeaways	12	8	13.5	9.1	6.4
Other Services	15	15	16.9	17.0	16.1
Vacant	4	6	4.5	6.5	14.5
Total	89	92	100.0	100.0	100.0

Source: Harrow Borough Council shop frontage surveys June 2016 and July 2023; Experian Goad UK town centres averages data.

North Harrow has 92 commercial units. The number of vacant units has risen since 2016, although the vacancy rate remains lower than the national average. North Harrow has a lower proportion of comparison shops and a higher proportion of convenience shops than the national average.

North Harrow has a small selection of comparison shops (20), all of which are independent traders aside from the St Luke's Hospice charity shop. There are no national multiple comparison retailers present.

There is a reasonable selection of restaurants/cafés and takeaways, albeit small independent outlets, apart from Costa Coffee. North Harrow has the highest proportion of pubs/bars in the Borough, although this is still less than half of the UK average.

North Harrow has a good range of financial/professional and other service uses for its relative size, with a choice of service providers, including:

- 5 accountants and financial services;
- 2 solicitors' offices;
- plumbing service;
- 5 estate agents;
- betting shop;
- slots casino;
- 11 barbers, hair/beauty salons;
- 2 dry cleaners; and
- care provider centre.

There are no banks/building societies. There is a gym.

J. EDGWARE MAJOR CENTRE

Edgware is on the eastern boundary of Harrow Borough. Most of the major centre is located within LB Barnet with only the small south-west tail-end of the centre in LB Harrow. LB Harrow's latest shop frontage survey (July 2023) only includes 47 units within the centre, and excludes uses in the Broadwalk Centre, on Station Road and the eastern side of Edgware Road High Street. Therefore, a reliable audit of the centre is not possible based on the Council's land use data.

Edgware has a strong convenience and comparison goods offer. The Broadwalk Centre is anchored by a Sainsbury's food store and has a concentration of national multiples including Boots, Superdrug, Card Factory, WH Smith, Claire's, New Look, TK Maxx, Robert Dyas, Poundland, JD Sports, Three, EE, O2, Holland & Barrett, Timpson, Costa Coffee and Wenzel's the Baker. Edgware also has Lidl, Iceland and Tesco Express stores.

K. KINGSBURY DISTRICT CENTRE

Kingsbury is on the southern boundary in the south-east of Harrow Borough. Most of the district centre is located within LB Brent with only a small western bit of the centre in LB Harrow. Only 13 units are in LB Harrow, therefore a reliable audit of the centre is not possible based on the Council's land use data.

Iceland is the main operator within the Harrow part of the centre on Kenton Road. The main operators within the Brent part of the centre include Aldi, Boots, Costa Coffee, Chaiiwala, Greggs, Barclays, Halifax, HSBC, Lloyds, Santander, NatWest and Tesco Express.

L. LOCAL CENTRES

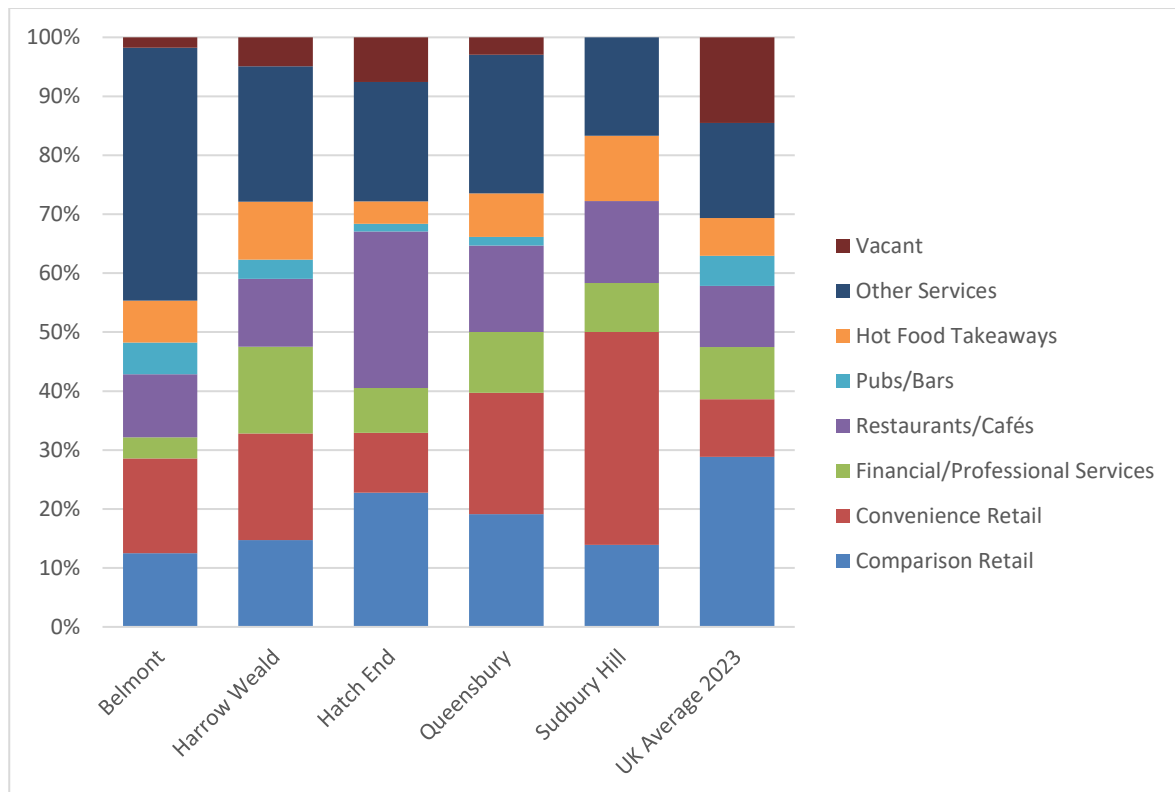
The main designated local centres within the Borough are Belmont, Harrow Weald, Hatch End, Queensbury and Sudbury Hill. The diversity of uses is shown in Table L.1 and Figure L.1 below.

Table L.1 Local Centres Use Class Mix by Unit 2023

Type of Unit	Belmont	Harrow Weald	Hatch End	Queensbury	Sudbury Hill
Comparison Retail	7	9	18	13	5
Convenience Retail	9	11	8	14	13
Financial/Professional Services	2	9	6	7	3
Restaurants/Cafés	6	7	21	10	5
Pubs/Bars	3	2	1	1	0
Hot Food Takeaways	4	6	3	5	4
Other Services	24	14	16	16	6
Vacant	1	3	6	2	0
Total	56	61	79	68	36

Source: Harrow Borough Council shop frontage surveys July 2023.

Figure L.1 Local Centres Proportional Mix of Uses 2023



Source: Harrow Borough Council shop frontage surveys July 2023; Experian Goad UK town centres averages data.

Local centres are generally smaller than district centres in terms of the number of shop units (less than 80 units) and overall floorspace (less than 10,000 sq.m gross).

The mix of uses is broadly similar within local centres in comparison with district centres, but they are almost exclusively small independent shops and services. Comparison shopping tends to cater for lower order day-to-day products, rather than higher order window-shopping.

The local centres have a below average proportion of comparison goods shops, but conversely a strong provision of convenience goods shopping. The provision of financial/professional services in the centres is in general terms, good and comparable with the national average; only in Belmont is there a much lower provision. Meanwhile, provision for other non-retail services throughout these centres is strong.

The local centres have a good provision of restaurants/cafés, especially in Hatch End, but there are no pubs/bars in Sudbury Hill, but Sudbury Hill together with Harrow Weald have a high provision of hot food takeaways.

All the local centres have very low vacancy rates when compared with the UK average.

Appendix 3 Convenience goods assessment

Table 1: Study area population

Zone	2021	2023	2026	2031	2036	2041
Zone 1 Harrow Central	55,297	57,596	62,997	74,471	77,009	78,476
Zone 2 Harrow Southwest	57,148	58,577	59,145	58,764	59,183	60,486
Zone 3 Harrow Northwest	46,162	47,304	47,294	46,142	46,443	47,403
Zone 4 Harrow Northeast	46,618	47,817	47,639	47,480	47,936	48,774
Zone 5 Harrow Southeast	55,607	57,102	56,985	55,505	55,900	57,154
Zone 6 Brent North	66,949	67,638	68,171	69,171	70,416	71,433
Zone 7 Ealing North	47,237	47,074	46,720	46,504	46,552	46,809
Zone 8 Hillingdon Northeast	56,136	56,757	57,077	57,421	57,568	57,646
Total	431,154	439,865	446,028	455,458	461,007	468,181

Sources: *GLA 2021 based 10-year supply - constrained ward level projections for Zones 1 to 5*
Experian population projections for Zones 6 to 8

Table 2: Convenience goods expenditure per person (£)

Zone	2023	2026	2031	2036	2041
Zone 1 Harrow Central	2,017	1,996	1,995	2,006	2,019
Zone 2 Harrow Southwest	2,036	2,014	2,013	2,025	2,038
Zone 3 Harrow Northwest	2,385	2,360	2,358	2,372	2,388
Zone 4 Harrow Northeast	2,279	2,255	2,254	2,267	2,282
Zone 5 Harrow Southeast	1,885	1,865	1,864	1,875	1,888
Zone 6 Brent North	1,993	1,972	1,971	1,982	1,995
Zone 7 Ealing North	1,944	1,923	1,922	1,933	1,946
Zone 8 Hillingdon Northeast	2,312	2,287	2,286	2,299	2,315

Sources: *Experian Local Expenditure 2021 (2021 prices)*
Experian expenditure and SFT forecasts - Retail Planner Briefing Note 20 (February 2023)
Excludes Special Forms of Trading

Table 3: Total convenience goods expenditure (£m)

Zone	2023	2026	2031	2036	2041
Zone 1 Harrow Central	116.17	125.74	148.57	154.48	158.44
Zone 2 Harrow Southwest	119.26	119.12	118.29	119.85	123.27
Zone 3 Harrow Northwest	112.82	111.61	108.80	110.16	113.20
Zone 4 Harrow Northeast	108.97	107.43	107.02	108.67	111.30
Zone 5 Harrow Southeast	107.64	106.28	103.46	104.81	107.91
Zone 6 Brent North	134.80	134.43	136.34	139.56	142.51
Zone 7 Ealing North	91.51	89.84	89.38	89.99	91.09
Zone 8 Hillingdon Northeast	131.22	130.54	131.26	132.35	133.45
Total	922.40	924.99	943.13	959.87	981.17

Source: Tables 1 and 2

Table 4: Base year 2023 convenience goods market shares (%)

Location		Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow
Zone 1 - Harrow Central	Asda, Wealdstone	12.3%	0.0%	0.5%	0.2%	0.0%	1.2%	1.7%	0.4%	5.0%
	Lidl, Saint Anns, Harrow	3.7%	1.3%	0.0%	0.4%	1.4%	1.4%	0.8%	0.0%	5.0%
	Morrisons, Harrow	5.9%	2.7%	0.0%	0.0%	0.5%	0.0%	2.0%	1.1%	5.0%
	Tesco, Station Road Harrow	16.4%	3.7%	5.6%	3.9%	7.8%	5.1%	1.0%	0.5%	5.0%
	Other main stores - Zone 2	7.7%	1.8%	2.7%	2.4%	2.3%	0.6%	0.0%	0.0%	5.0%
	Other Zone 2	2.5%	0.0%	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%	2.0%
	Sub-total - Zone 1	48.5%	9.5%	8.8%	7.1%	12.0%	8.3%	5.5%	2.0%	
Zone 2 - Harrow Southwest	Aldi, Northolt Road, South Harrow	0.3%	12.1%	0.0%	0.0%	0.0%	1.7%	4.8%	1.0%	5.0%
	Asda, Northolt Road, South Harrow	0.0%	5.8%	1.6%	0.0%	0.0%	0.0%	8.9%	0.0%	5.0%
	Waitrose, Northolt Rd, South Harrow	1.9%	10.2%	1.3%	0.2%	0.8%	0.8%	1.4%	0.8%	5.0%
	Other main stores - Zone 2	3.3%	10.8%	1.9%	0.0%	2.2%	1.0%	2.3%	4.0%	5.0%
	Other Zone 2	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%	1.1%	0.0%	2.0%
	Sub-total - Zone 2	5.5%	39.9%	4.8%	0.2%	3.0%	3.5%	18.5%	5.8%	
Zone 3 - Harrow Northwest	Lidl, Pinner	1.0%	0.5%	9.1%	0.0%	0.0%	0.0%	0.0%	1.7%	2.0%
	M&S Simply Food, Pinner	0.3%	0.4%	7.4%	0.3%	0.0%	0.0%	0.0%	1.9%	2.0%
	Morrisons, Hatch End	9.1%	2.1%	11.1%	6.0%	0.7%	0.0%	0.0%	0.6%	2.0%
	Sainsbury's, Pinner	0.8%	2.4%	18.7%	0.0%	0.7%	0.0%	0.0%	2.1%	2.0%
	Tesco, Ash Hill Drive	0.0%	0.2%	16.6%	0.0%	0.0%	0.0%	0.0%	6.1%	2.0%
	Other main stores - Zone 3	7.9%	3.4%	8.4%	0.0%	0.1%	0.7%	0.2%	3.0%	2.0%
	Other Zone 3	0.2%	0.5%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%
Sub-total - Zone 3	19.3%	9.5%	71.4%	6.3%	1.5%	0.7%	0.2%	15.4%		
Zone 4 - Harrow Northeast	Lidl, Harrow Weald	4.6%	0.0%	3.5%	12.4%	0.4%	0.3%	0.9%	0.0%	2.0%
	Lidl, Stanmore	0.0%	0.0%	0.0%	7.6%	0.6%	1.4%	0.0%	0.0%	2.0%
	Sainsbury's, Stanmore	0.0%	0.0%	0.5%	14.0%	1.4%	0.0%	0.0%	0.0%	2.0%
	Waitrose, Harrow Weald	3.8%	0.0%	0.1%	10.5%	4.0%	0.5%	0.0%	0.0%	2.0%
	Other main stores - Zone 4	6.8%	0.0%	0.9%	10.0%	7.9%	2.4%	0.1%	0.0%	2.0%
	Other Zone 4	0.0%	0.0%	0.0%	0.5%	0.0%	0.0%	0.0%	0.0%	1.0%
Sub-total - Zone 4	15.2%	0.0%	5.0%	55.0%	14.3%	4.6%	1.0%	0.0%		
Zone 5 - Harrow Southeast	Lidl, Edgware	0.0%	0.0%	0.0%	0.2%	5.1%	0.1%	0.0%	0.0%	60.0%
	Other main stores - Zone 5	0.0%	0.0%	0.0%	2.5%	7.8%	3.9%	0.0%	0.5%	55.0%
	Other Zone 5	0.0%	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%	0.0%	50.0%
	Sub-total - Zone 5	0.0%	0.0%	0.0%	2.7%	13.7%	4.0%	0.0%	0.5%	
LB Harrow total	88.5%	58.9%	90.0%	71.3%	44.5%	21.1%	25.2%	23.7%		
Other study area zones	Zone 6 Brent North	3.3%	0.5%	0.0%	5.4%	38.2%	45.6%	2.4%	0.6%	n/a
	Zone 7 Ealing North	0.0%	1.0%	0.0%	0.0%	0.0%	0.6%	17.1%	0.0%	n/a
	Zone 8 Hillingdon Northeast	0.7%	29.3%	2.4%	0.8%	0.7%	3.1%	21.7%	54.1%	n/a
	Sub-total - Zones 6 to 8	4.0%	30.8%	2.4%	6.2%	38.9%	49.3%	41.2%	54.7%	0.0%
Outside study area	LB Barnet	0.0%	1.1%	0.0%	11.2%	11.3%	5.2%	0.6%	1.1%	
	LB Brent	3.3%	0.9%	0.0%	4.2%	0.1%	20.4%	7.6%	1.3%	
	LB Ealing	0.0%	1.9%	0.8%	0.0%	1.5%	0.1%	15.7%	0.0%	
	LB Hillingdon	0.6%	4.6%	3.3%	0.0%	1.1%	0.2%	8.8%	17.9%	
	Hertsmere	0.0%	0.0%	0.0%	1.9%	0.0%	0.0%	0.0%	0.0%	
	Watford	1.8%	1.8%	1.7%	4.1%	1.9%	2.0%	0.8%	0.2%	
	Other	1.8%	0.0%	1.8%	1.1%	0.7%	1.7%	0.1%	1.1%	
	Elsewhere Sub-Total	7.5%	10.3%	7.6%	22.5%	16.6%	29.6%	33.6%	21.6%	
TOTAL	TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%		

Source: NEMS Household Survey August 2023 - with Lichfield's analysis

Table 5: Base year 2023 convenience goods shopping patterns (£M)

Location		Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Expenditure 2023		116.17	119.26	112.82	108.97	107.64	134.80	91.51	131.22		922.40
Zone 1 - Harrow Central	Asda, Wealdstone	14.29	0.00	0.56	0.22	0.00	1.62	1.56	0.52	0.99	19.76
	Lidl, Saint Anns, Harrow	4.30	1.55	0.00	0.44	1.51	1.89	0.73	0.00	0.55	10.96
	Morrisons, Harrow	6.85	3.22	0.00	0.00	0.54	0.00	1.83	1.44	0.73	14.62
	Tesco, Station Road Harrow	19.05	4.41	6.32	4.25	8.40	6.87	0.92	0.66	2.68	53.55
	Other main stores - Zone 1	8.95	2.15	3.05	2.62	2.48	0.81	0.00	0.00	1.05	21.09
	Other Zone 1	2.90	0.00	0.00	0.22	0.00	0.00	0.00	0.00	0.06	3.19
	Sub-total - Zone 1	56.34	11.33	9.93	7.74	12.92	11.19	5.03	2.62	6.06	123.16
Zone 2 - Harrow Southwest	Aldi, Northolt Road, South Harrow	0.35	14.43	0.00	0.00	0.00	2.29	4.39	1.31	1.20	23.97
	Asda, Northolt Road, South Harrow	0.00	6.92	1.81	0.00	0.00	0.00	8.14	0.00	0.89	17.75
	Waitrose, Northolt Rd, South Harrow	2.21	12.16	1.47	0.22	0.86	1.08	1.28	1.05	1.07	21.40
	Other main stores - Zone 2	3.83	12.88	2.14	0.00	2.37	1.35	2.10	5.25	1.58	31.50
	Other Zone 2	0.00	1.19	0.00	0.00	0.00	0.00	1.01	0.00	0.04	2.24
	Sub-total - Zone 2	6.39	47.59	5.42	0.22	3.23	4.72	16.93	7.61	4.78	96.87
Zone 3 - Harrow Northwest	Lidl, Pinner	1.16	0.60	10.27	0.00	0.00	0.00	0.00	2.23	0.29	14.55
	M&S Simply Food, Pinner	0.35	0.48	8.35	0.33	0.00	0.00	0.00	2.49	0.24	12.24
	Morrisons, Hatch End	10.57	2.50	12.52	6.54	0.75	0.00	0.00	0.79	0.69	34.37
	Sainsbury's, Pinner	0.93	2.86	21.10	0.00	0.75	0.00	0.00	2.76	0.58	28.98
	Tesco, Ash Hill Drive	0.00	0.24	18.73	0.00	0.00	0.00	0.00	8.00	0.55	27.52
	Other main stores - Zone 3	9.18	4.05	9.48	0.00	0.11	0.94	0.18	3.94	0.57	28.45
	Other Zone 3	0.23	0.60	0.11	0.00	0.00	0.00	0.00	0.00	0.01	0.95
	Sub-total - Zone 3	22.42	11.33	80.55	6.87	1.61	0.94	0.18	20.21	2.93	147.05
Zone 4 - Harrow Northeast	Lidl, Harrow Weald	5.34	0.00	3.95	13.51	0.43	0.40	0.82	0.00	0.50	24.96
	Lidl, Stanmore	0.00	0.00	0.00	8.28	0.65	1.89	0.00	0.00	0.22	11.04
	Sainsbury's, Stanmore	0.00	0.00	0.56	15.26	1.51	0.00	0.00	0.00	0.35	17.68
	Waitrose, Harrow Weald	4.41	0.00	0.11	11.44	4.31	0.67	0.00	0.00	0.43	21.38
	Other main stores - Zone 4	7.90	0.00	1.02	10.90	8.50	3.24	0.09	0.00	0.65	32.29
	Other Zone 4	0.00	0.00	0.00	0.54	0.00	0.00	0.00	0.00	0.01	0.55
	Sub-total - Zone 4	17.66	0.00	5.64	59.94	15.39	6.20	0.92	0.00	2.15	107.90
Zone 5 - Harrow Southeast	Lidl, Edgware	0.00	0.00	0.00	0.22	5.49	0.13	0.00	0.00	8.76	14.61
	Other main stores - Zone 5	0.00	0.00	0.00	2.72	8.40	5.26	0.00	0.66	20.82	37.85
	Other Zone 5	0.00	0.00	0.00	0.00	0.86	0.00	0.00	0.00	0.86	1.72
	Sub-total - Zone 5	0.00	0.00	0.00	2.94	14.75	5.39	0.00	0.66	30.44	54.18
LB Harrow total		102.81	70.25	101.54	77.70	47.90	28.44	23.06	31.10		529.16
Other study area zones	Zone 6 Brent North	3.83	0.60	0.00	5.88	41.12	61.47	2.20	0.79	n/a	115.89
	Zone 7 Ealing North	0.00	1.19	0.00	0.00	0.00	0.81	15.65	0.00	n/a	17.65
	Zone 8 Hillingdon Northeast	0.81	34.94	2.71	0.87	0.75	4.18	19.86	70.99	n/a	135.12
	Sub-total - Zones 6 to 8	4.65	36.73	2.71	6.76	41.87	66.46	37.70	71.78	30.44	852.00
Outside study area	LB Barnet	0.00	1.31	0.00	12.21	12.16	7.01	0.55	1.44	n/a	34.68
	LB Brent	3.83	1.07	0.00	4.58	0.11	27.50	6.95	1.71	n/a	45.75
	LB Ealing	0.00	2.27	0.90	0.00	1.61	0.13	14.37	0.00	n/a	19.29
	LB Hillingdon	0.70	5.49	3.72	0.00	1.18	0.27	8.05	23.49	n/a	42.90
	Hertsmere	0.00	0.00	0.00	2.07	0.00	0.00	0.00	0.00	n/a	2.07
	Watford	2.09	2.15	1.92	4.47	2.05	2.70	0.73	0.26	n/a	16.36
	Other	2.09	0.00	2.03	1.20	0.75	2.29	0.09	1.44	n/a	9.90
	Elsewhere Sub-Total	8.71	12.28	8.57	24.52	17.87	39.90	30.75	28.34	0.00	170.95
TOTAL		116.17	119.26	112.82	108.97	107.64	134.80	91.51	131.22		

Source: Tables 3 and 4

Table 6: Future 2026 convenience goods shopping patterns (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Expenditure 2026	125.74	119.12	111.61	107.43	106.28	134.43	89.84	130.54		924.99
Zone 1 - Harrow Central										
Asda, Wealdstone	15.47	0.00	0.56	0.21	0.00	1.61	1.53	0.52	1.05	20.95
Lidl, Saint Anns, Harrow	4.65	1.55	0.00	0.43	1.49	1.88	0.72	0.00	0.56	11.28
Morrisons, Harrow	7.42	3.22	0.00	0.00	0.53	0.00	1.80	1.44	0.76	15.16
Tesco, Station Road Harrow	20.62	4.41	6.25	4.19	8.29	6.86	0.90	0.65	2.75	54.91
Other main stores - Zone 1	9.68	2.14	3.01	2.58	2.44	0.81	0.00	0.00	1.09	21.76
Other Zone 1	3.14	0.00	0.00	0.21	0.00	0.00	0.00	0.00	0.07	3.43
Sub-total - Zone 1	60.98	11.32	9.82	7.63	12.75	11.16	4.94	2.61	6.27	127.49
Zone 2 - Harrow Southwest										
Aldi, Northolt Road, South Harrow	0.38	14.41	0.00	0.00	0.00	2.29	4.31	1.31	1.19	23.89
Asda, Northolt Road, South Harrow	0.00	6.91	1.79	0.00	0.00	0.00	8.00	0.00	0.88	17.57
Waitrose, Northolt Rd, South Harrow	2.39	12.15	1.45	0.21	0.85	1.08	1.26	1.04	1.08	21.51
Other main stores - Zone 2	4.15	12.86	2.12	0.00	2.34	1.34	2.07	5.22	1.58	31.69
Other Zone 2	0.00	1.19	0.00	0.00	0.00	0.00	0.99	0.00	0.04	2.22
Sub-total - Zone 2	6.92	47.53	5.36	0.21	3.19	4.71	16.62	7.57	4.78	96.88
Zone 3 - Harrow Northwest										
Lidl, Pinner	1.26	0.60	10.16	0.00	0.00	0.00	0.00	2.22	0.29	14.52
M&S Simply Food, Pinner	0.38	0.48	8.26	0.32	0.00	0.00	0.00	2.48	0.24	12.16
Morrisons, Hatch End	11.44	2.50	12.39	6.45	0.74	0.00	0.00	0.78	0.70	35.01
Sainsbury's, Pinner	1.01	2.86	20.87	0.00	0.74	0.00	0.00	2.74	0.58	28.80
Tesco, Ash Hill Drive	0.00	0.24	18.53	0.00	0.00	0.00	0.00	7.96	0.55	27.27
Other main stores - Zone 3	9.93	4.05	9.38	0.00	0.11	0.94	0.18	3.92	0.58	29.08
Other Zone 3	0.25	0.60	0.11	0.00	0.00	0.00	0.00	0.00	0.01	0.97
Sub-total - Zone 3	24.27	11.32	79.69	6.77	1.59	0.94	0.18	20.10	2.95	147.81
Zone 4 - Harrow Northeast										
Lidl, Harrow Weald	5.78	0.00	3.91	13.32	0.43	0.40	0.81	0.00	0.50	25.15
Lidl, Stanmore	0.00	0.00	0.00	8.16	0.64	1.88	0.00	0.00	0.22	10.90
Sainsbury's, Stanmore	0.00	0.00	0.56	15.04	1.49	0.00	0.00	0.00	0.35	17.43
Waitrose, Harrow Weald	4.78	0.00	0.11	11.28	4.25	0.67	0.00	0.00	0.43	21.52
Other main stores - Zone 4	8.55	0.00	1.00	10.74	8.40	3.23	0.09	0.00	0.65	32.66
Other Zone 4	0.00	0.00	0.00	0.54	0.00	0.00	0.00	0.00	0.01	0.54
Sub-total - Zone 4	19.11	0.00	5.58	59.08	15.20	6.18	0.90	0.00	2.16	108.22
Zone 5 - Harrow Southeast										
Lidl, Edgware	0.00	0.00	0.00	0.21	5.42	0.13	0.00	0.00	8.65	14.42
Other main stores - Zone 5	0.00	0.00	0.00	2.69	8.29	5.24	0.00	0.65	20.62	37.49
Other Zone 5	0.00	0.00	0.00	0.00	0.85	0.00	0.00	0.00	0.85	1.70
Sub-total - Zone 5	0.00	0.00	0.00	2.90	14.56	5.38	0.00	0.65	30.12	53.61
LB Harrow total	111.28	70.16	100.45	76.59	47.29	28.37	22.64	30.94		534.00
Other study area zones										
Zone 6 Brent North	4.15	0.60	0.00	5.80	40.60	61.30	2.16	0.78	n/a	115.38
Zone 7 Ealing North	0.00	1.19	0.00	0.00	0.00	0.81	15.36	0.00	n/a	17.36
Zone 8 Hillingdon Northeast	0.88	34.90	2.68	0.86	0.74	4.17	19.50	70.62	n/a	134.35
Sub-total - Zones 6 to 8	5.03	36.69	2.68	6.66	41.34	66.28	37.02	71.40	30.12	854.71
Outside study area										
LB Barnet	0.00	1.31	0.00	12.03	12.01	6.99	0.54	1.44	n/a	34.32
LB Brent	4.15	1.07	0.00	4.51	0.11	27.42	6.83	1.70	n/a	45.79
LB Ealing	0.00	2.26	0.89	0.00	1.59	0.13	14.11	0.00	n/a	18.99
LB Hillingdon	0.75	5.48	3.68	0.00	1.17	0.27	7.91	23.37	n/a	42.63
Hertsmere	0.00	0.00	0.00	2.04	0.00	0.00	0.00	0.00	n/a	2.04
Watford	2.26	2.14	1.90	4.40	2.02	2.69	0.72	0.26	n/a	16.40
Other	2.26	0.00	2.01	1.18	0.74	2.29	0.09	1.44	n/a	10.01
Elsewhere Sub-Total	9.43	12.27	8.48	24.17	17.64	39.79	30.19	28.20	0.00	170.17
TOTAL	125.74	119.12	111.61	107.43	106.28	134.43	89.84	130.54		

Source: Tables 3 and 4

Table 7: Future 2031 convenience goods shopping patterns (£M)

Location		Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Expenditure 2031		148.57	118.29	108.80	107.02	103.46	136.34	89.38	131.26		943.13
Zone 1 - Harrow Central	Asda, Wealdstone	18.27	0.00	0.54	0.21	0.00	1.64	1.52	0.53	1.20	23.91
	Lidl, Saint Anns, Harrow	5.50	1.54	0.00	0.43	1.45	1.91	0.72	0.00	0.61	12.14
	Morrisons, Harrow	8.77	3.19	0.00	0.00	0.52	0.00	1.79	1.44	0.83	16.54
	Tesco, Station Road Harrow	24.37	4.38	6.09	4.17	8.07	6.95	0.89	0.66	2.93	58.51
	Other main stores - Zone 1	11.44	2.13	2.94	2.57	2.38	0.82	0.00	0.00	1.17	23.45
	Other Zone 1	3.71	0.00	0.00	0.21	0.00	0.00	0.00	0.00	0.08	4.01
	Sub-total - Zone 1	72.06	11.24	9.57	7.60	12.42	11.32	4.92	2.63	6.81	138.55
Zone 2 - Harrow Southwest	Aldi, Northolt Road, South Harrow	0.45	14.31	0.00	0.00	0.00	2.32	4.29	1.31	1.19	23.87
	Asda, Northolt Road, South Harrow	0.00	6.86	1.74	0.00	0.00	0.00	7.95	0.00	0.87	17.43
	Waitrose, Northolt Rd, South Harrow	2.82	12.07	1.41	0.21	0.83	1.09	1.25	1.05	1.09	21.83
	Other main stores - Zone 2	4.90	12.78	2.07	0.00	2.28	1.36	2.06	5.25	1.62	32.31
	Other Zone 2	0.00	1.18	0.00	0.00	0.00	0.00	0.98	0.00	0.04	2.21
	Sub-total - Zone 2	8.17	47.20	5.22	0.21	3.10	4.77	16.54	7.61	4.82	97.65
Zone 3 - Harrow Northwest	Lidl, Pinner	1.49	0.59	9.90	0.00	0.00	0.00	0.00	2.23	0.29	14.50
	M&S Simply Food, Pinner	0.45	0.47	8.05	0.32	0.00	0.00	0.00	2.49	0.24	12.03
	Morrisons, Hatch End	13.52	2.48	12.08	6.42	0.72	0.00	0.00	0.79	0.73	36.75
	Sainsbury's, Pinner	1.19	2.84	20.35	0.00	0.72	0.00	0.00	2.76	0.57	28.42
	Tesco, Ash Hill Drive	0.00	0.24	18.06	0.00	0.00	0.00	0.00	8.01	0.54	26.84
	Other main stores - Zone 3	11.74	4.02	9.14	0.00	0.10	0.95	0.18	3.94	0.61	30.69
	Other Zone 3	0.30	0.59	0.11	0.00	0.00	0.00	0.00	0.00	0.01	1.01
	Sub-total - Zone 3	28.67	11.24	77.69	6.74	1.55	0.95	0.18	20.21	2.99	150.23
Zone 4 - Harrow Northeast	Lidl, Harrow Weald	6.83	0.00	3.81	13.27	0.41	0.41	0.80	0.00	0.52	26.06
	Lidl, Stanmore	0.00	0.00	0.00	8.13	0.62	1.91	0.00	0.00	0.22	10.88
	Sainsbury's, Stanmore	0.00	0.00	0.54	14.98	1.45	0.00	0.00	0.00	0.35	17.32
	Waitrose, Harrow Weald	5.65	0.00	0.11	11.24	4.14	0.68	0.00	0.00	0.45	22.26
	Other main stores - Zone 4	10.10	0.00	0.98	10.70	8.17	3.27	0.09	0.00	0.68	34.00
	Other Zone 4	0.00	0.00	0.00	0.54	0.00	0.00	0.00	0.00	0.01	0.54
	Sub-total - Zone 4	22.58	0.00	5.44	58.86	14.79	6.27	0.89	0.00	2.22	111.06
Zone 5 - Harrow Southeast	Lidl, Edgware	0.00	0.00	0.00	0.21	5.28	0.14	0.00	0.00	8.44	14.07
	Other main stores - Zone 5	0.00	0.00	0.00	2.68	8.07	5.32	0.00	0.66	20.43	37.15
	Other Zone 5	0.00	0.00	0.00	0.00	0.83	0.00	0.00	0.00	0.83	1.66
	Sub-total - Zone 5	0.00	0.00	0.00	2.89	14.17	5.45	0.00	0.66	29.70	52.88
LB Harrow total		131.48	69.67	97.92	76.31	46.04	28.77	22.52	31.11		550.36
Other study area zones	Zone 6 Brent North	4.90	0.59	0.00	5.78	39.52	62.17	2.15	0.79	n/a	115.90
	Zone 7 Ealing North	0.00	1.18	0.00	0.00	0.00	0.82	15.28	0.00	n/a	17.29
	Zone 8 Hillingdon Northeast	1.04	34.66	2.61	0.86	0.72	4.23	19.40	71.01	n/a	134.53
	Sub-total - Zones 6 to 8	5.94	36.43	2.61	6.64	40.25	67.21	36.82	71.80	29.70	870.95
Outside study area	LB Barnet	0.00	1.30	0.00	11.99	11.69	7.09	0.54	1.44	n/a	34.05
	LB Brent	4.90	1.06	0.00	4.49	0.10	27.81	6.79	1.71	n/a	46.88
	LB Ealing	0.00	2.25	0.87	0.00	1.55	0.14	14.03	0.00	n/a	18.84
	LB Hillingdon	0.89	5.44	3.59	0.00	1.14	0.27	7.87	23.50	n/a	42.70
	Hertsmere	0.00	0.00	0.00	2.03	0.00	0.00	0.00	0.00	n/a	2.03
	Watford	2.67	2.13	1.85	4.39	1.97	2.73	0.72	0.26	n/a	16.71
	Other	2.67	0.00	1.96	1.18	0.72	2.32	0.09	1.44	n/a	10.39
	Elsewhere Sub-Total	11.14	12.18	8.27	24.08	17.17	40.36	30.03	28.35	0.00	171.59
TOTAL		148.57	118.29	108.80	107.02	103.46	136.34	89.38	131.26		

Source: Tables 3 and 4

Table 8: Future 2036 convenience goods shopping patterns (£M)

Location		Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Expenditure 2036		154.48	119.85	110.16	108.67	104.81	139.56	89.99	132.35		959.87
Zone 1 - Harrow Central	Asda, Wealdstone	19.00	0.00	0.55	0.22	0.00	1.67	1.53	0.53	1.24	24.74
	Lidl, Saint Anns, Harrow	5.72	1.56	0.00	0.43	1.47	1.95	0.72	0.00	0.62	12.47
	Morrisons, Harrow	9.11	3.24	0.00	0.00	0.52	0.00	1.80	1.46	0.85	16.98
	Tesco, Station Road Harrow	25.33	4.43	6.17	4.24	8.18	7.12	0.90	0.66	3.00	60.03
	Other main stores - Zone 1	11.89	2.16	2.97	2.61	2.41	0.84	0.00	0.00	1.20	24.09
	Other Zone 1	3.86	0.00	0.00	0.22	0.00	0.00	0.00	0.00	0.08	4.16
	Sub-total - Zone 1	74.92	11.39	9.69	7.72	12.58	11.58	4.95	2.65	7.00	142.47
Zone 2 - Harrow Southwest	Aldi, Northolt Road, South Harrow	0.46	14.50	0.00	0.00	0.00	2.37	4.32	1.32	1.21	24.19
	Asda, Northolt Road, South Harrow	0.00	6.95	1.76	0.00	0.00	0.00	8.01	0.00	0.88	17.60
	Waitrose, Northolt Rd, South Harrow	2.94	12.22	1.43	0.22	0.84	1.12	1.26	1.06	1.11	22.19
	Other main stores - Zone 2	5.10	12.94	2.09	0.00	2.31	1.40	2.07	5.29	1.64	32.84
	Other Zone 2	0.00	1.20	0.00	0.00	0.00	0.00	0.99	0.00	0.04	2.23
	Sub-total - Zone 2	8.50	47.82	5.29	0.22	3.14	4.88	16.65	7.68	4.89	99.06
Zone 3 - Harrow Northwest	Lidl, Pinner	1.54	0.60	10.02	0.00	0.00	0.00	0.00	2.25	0.29	14.71
	M&S Simply Food, Pinner	0.46	0.48	8.15	0.33	0.00	0.00	0.00	2.51	0.24	12.18
	Morrisons, Hatch End	14.06	2.52	12.23	6.52	0.73	0.00	0.00	0.79	0.75	37.60
	Sainsbury's, Pinner	1.24	2.88	20.60	0.00	0.73	0.00	0.00	2.78	0.58	28.80
	Tesco, Ash Hill Drive	0.00	0.24	18.29	0.00	0.00	0.00	0.00	8.07	0.54	27.14
	Other main stores - Zone 3	12.20	4.07	9.25	0.00	0.10	0.98	0.18	3.97	0.63	31.39
	Other Zone 3	0.31	0.60	0.11	0.00	0.00	0.00	0.00	0.00	0.01	1.03
	Sub-total - Zone 3	29.81	11.39	78.66	6.85	1.57	0.98	0.18	20.38	3.05	152.86
Zone 4 - Harrow Northeast	Lidl, Harrow Weald	7.11	0.00	3.86	13.48	0.42	0.42	0.81	0.00	0.53	26.62
	Lidl, Stanmore	0.00	0.00	0.00	8.26	0.63	1.95	0.00	0.00	0.22	11.06
	Sainsbury's, Stanmore	0.00	0.00	0.55	15.21	1.47	0.00	0.00	0.00	0.35	17.58
	Waitrose, Harrow Weald	5.87	0.00	0.11	11.41	4.19	0.70	0.00	0.00	0.45	22.74
	Other main stores - Zone 4	10.50	0.00	0.99	10.87	8.28	3.35	0.09	0.00	0.70	34.78
	Other Zone 4	0.00	0.00	0.00	0.54	0.00	0.00	0.00	0.00	0.01	0.55
	Sub-total - Zone 4	23.48	0.00	5.51	59.77	14.99	6.42	0.90	0.00	2.26	113.33
Zone 5 - Harrow Southeast	Lidl, Edgware	0.00	0.00	0.00	0.22	5.35	0.14	0.00	0.00	8.55	14.26
	Other main stores - Zone 5	0.00	0.00	0.00	2.72	8.18	5.44	0.00	0.66	20.77	37.77
	Other Zone 5	0.00	0.00	0.00	0.00	0.84	0.00	0.00	0.00	0.84	1.68
	Sub-total - Zone 5	0.00	0.00	0.00	2.93	14.36	5.58	0.00	0.66	30.17	53.70
LB Harrow total		136.71	70.59	99.15	77.48	46.64	29.45	22.68	31.37		561.42
Other study area zones	Zone 6 Brent North	5.10	0.60	0.00	5.87	40.04	63.64	2.16	0.79	n/a	118.20
	Zone 7 Ealing North	0.00	1.20	0.00	0.00	0.00	0.84	15.39	0.00	n/a	17.42
	Zone 8 Hillingdon Northeast	1.08	35.11	2.64	0.87	0.73	4.33	19.53	71.60	n/a	135.90
	Sub-total - Zones 6 to 8	6.18	36.91	2.64	6.74	40.77	68.81	37.07	72.39	30.17	886.65
Outside study area	LB Barnet	0.00	1.32	0.00	12.17	11.84	7.26	0.54	1.46	n/a	34.59
	LB Brent	5.10	1.08	0.00	4.56	0.10	28.47	6.84	1.72	n/a	47.88
	LB Ealing	0.00	2.28	0.88	0.00	1.57	0.14	14.13	0.00	n/a	19.00
	LB Hillingdon	0.93	5.51	3.64	0.00	1.15	0.28	7.92	23.69	n/a	43.12
	Hertsmere	0.00	0.00	0.00	2.06	0.00	0.00	0.00	0.00	n/a	2.06
	Watford	2.78	2.16	1.87	4.46	1.99	2.79	0.72	0.26	n/a	17.03
	Other	2.78	0.00	1.98	1.20	0.73	2.37	0.09	1.46	n/a	10.61
	Elsewhere Sub-Total	11.59	12.34	8.37	24.45	17.40	41.31	30.23	28.59	0.00	174.29
TOTAL		154.48	119.85	110.16	108.67	104.81	139.56	89.99	132.35		

Source: Tables 3 and 4

Table 9: Future 2041 convenience goods shopping patterns (£M)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Expenditure 2041	158.44	123.27	113.20	111.30	107.91	142.51	91.09	133.45		981.17
Zone 1 - Harrow Central										
Asda, Wealdstone	19.49	0.00	0.57	0.22	0.00	1.71	1.55	0.53	1.27	25.34
Lidl, Saint Anns, Harrow	5.86	1.60	0.00	0.45	1.51	2.00	0.73	0.00	0.64	12.78
Morrisons, Harrow	9.35	3.33	0.00	0.00	0.54	0.00	1.82	1.47	0.87	17.37
Tesco, Station Road Harrow	25.98	4.56	6.34	4.34	8.42	7.27	0.91	0.67	3.08	61.57
Other main stores - Zone 1	12.20	2.22	3.06	2.67	2.48	0.86	0.00	0.00	1.24	24.72
Other Zone 1	3.96	0.00	0.00	0.22	0.00	0.00	0.00	0.00	0.09	4.27
Sub-total - Zone 1	76.84	11.71	9.96	7.90	12.95	11.83	5.01	2.67	7.17	146.05
Zone 2 - Harrow Southwest										
Aldi, Northolt Road, South Harrow	0.48	14.92	0.00	0.00	0.00	2.42	4.37	1.33	1.24	24.76
Asda, Northolt Road, South Harrow	0.00	7.15	1.81	0.00	0.00	0.00	8.11	0.00	0.90	17.97
Waitrose, Northolt Rd, South Harrow	3.01	12.57	1.47	0.22	0.86	1.14	1.28	1.07	1.14	22.76
Other main stores - Zone 2	5.23	13.31	2.15	0.00	2.37	1.43	2.10	5.34	1.68	33.60
Other Zone 2	0.00	1.23	0.00	0.00	0.00	0.00	1.00	0.00	0.05	2.28
Sub-total - Zone 2	8.71	49.18	5.43	0.22	3.24	4.99	16.85	7.74	5.00	101.37
Zone 3 - Harrow Northwest										
Lidl, Pinner	1.58	0.62	10.30	0.00	0.00	0.00	0.00	2.27	0.30	15.07
M&S Simply Food, Pinner	0.48	0.49	8.38	0.33	0.00	0.00	0.00	2.54	0.25	12.46
Morrisons, Hatch End	14.42	2.59	12.57	6.68	0.76	0.00	0.00	0.80	0.77	38.58
Sainsbury's, Pinner	1.27	2.96	21.17	0.00	0.76	0.00	0.00	2.80	0.59	29.54
Tesco, Ash Hill Drive	0.00	0.25	18.79	0.00	0.00	0.00	0.00	8.14	0.55	27.73
Other main stores - Zone 3	12.52	4.19	9.51	0.00	0.11	1.00	0.18	4.00	0.64	32.15
Other Zone 3	0.32	0.62	0.11	0.00	0.00	0.00	0.00	0.00	0.01	1.06
Sub-total - Zone 3	30.58	11.71	80.82	7.01	1.62	1.00	0.18	20.55	3.12	156.60
Zone 4 - Harrow Northeast										
Lidl, Harrow Weald	7.29	0.00	3.96	13.80	0.43	0.43	0.82	0.00	0.55	27.28
Lidl, Stanmore	0.00	0.00	0.00	8.46	0.65	2.00	0.00	0.00	0.23	11.33
Sainsbury's, Stanmore	0.00	0.00	0.57	15.58	1.51	0.00	0.00	0.00	0.36	18.02
Waitrose, Harrow Weald	6.02	0.00	0.11	11.69	4.32	0.71	0.00	0.00	0.47	23.32
Other main stores - Zone 4	10.77	0.00	1.02	11.13	8.52	3.42	0.09	0.00	0.71	35.67
Other Zone 4	0.00	0.00	0.00	0.56	0.00	0.00	0.00	0.00	0.01	0.56
Sub-total - Zone 4	24.08	0.00	5.66	61.22	15.43	6.56	0.91	0.00	2.32	116.17
Zone 5 - Harrow Southeast										
Lidl, Edgware	0.00	0.00	0.00	0.22	5.50	0.14	0.00	0.00	8.80	14.67
Other main stores - Zone 5	0.00	0.00	0.00	2.78	8.42	5.56	0.00	0.67	21.30	38.72
Other Zone 5	0.00	0.00	0.00	0.00	0.86	0.00	0.00	0.00	0.86	1.73
Sub-total - Zone 5	0.00	0.00	0.00	3.01	14.78	5.70	0.00	0.67	30.96	55.12
LB Harrow total	140.22	72.61	101.88	79.36	48.02	30.07	22.95	31.63		575.31
Other study area zones										
Zone 6 Brent North	5.23	0.62	0.00	6.01	41.22	64.98	2.19	0.80	n/a	121.05
Zone 7 Ealing North	0.00	1.23	0.00	0.00	0.00	0.86	15.58	0.00	n/a	17.66
Zone 8 Hillingdon Northeast	1.11	36.12	2.72	0.89	0.76	4.42	19.77	72.20	n/a	137.97
Sub-total - Zones 6 to 8	6.34	37.97	2.72	6.90	41.98	70.26	37.53	73.00	30.96	907.11
Outside study area										
LB Barnet	0.00	1.36	0.00	12.47	12.19	7.41	0.55	1.47	n/a	35.44
LB Brent	5.23	1.11	0.00	4.67	0.11	29.07	6.92	1.73	n/a	48.85
LB Ealing	0.00	2.34	0.91	0.00	1.62	0.14	14.30	0.00	n/a	19.31
LB Hillingdon	0.95	5.67	3.74	0.00	1.19	0.29	8.02	23.89	n/a	43.73
Hertsmere	0.00	0.00	0.00	2.11	0.00	0.00	0.00	0.00	n/a	2.11
Watford	2.85	2.22	1.92	4.56	2.05	2.85	0.73	0.27	n/a	17.45
Other	2.85	0.00	2.04	1.22	0.76	2.42	0.09	1.47	n/a	10.85
Elsewhere Sub-Total	11.88	12.70	8.60	25.04	17.91	42.18	30.61	28.83	0.00	177.75
TOTAL	158.44	123.27	113.20	111.30	107.91	142.51	91.09	133.45		

Source: Tables 3 and 4

Table 10: Convenience goods floorspace and benchmark turnover 2023

Zone	Store	Sales Floorspace (sq.m net)	Convenience Goods Floorspace (%)	Convenience Goods Floorspace (sq.m net)	Turnover (£ per sq.m)	Total Turnover (£m)
1 - Harrow Central	Asda, Wealdstone	754	90%	679	£13,718	£9.31
	Iceland, Station Road, Wealdstone	570	95%	542	£6,665	£3.61
	Lidl, St Anns Road, Harrow	1,036	80%	829	£8,730	£7.24
	M&S Food Hall	697	100%	697	£10,888	£7.59
	Sainsbury's Local, Wealdstone	145	95%	138	£14,411	£1.99
	Tesco Express, College Road	319	95%	303	£13,477	£4.08
	Tesco Express, Station Road	188	95%	179	£13,477	£2.41
	Tesco, Station Road	3,399	70%	2,379	£13,477	£32.07
	M&S Simply Food, Bessborough Road	84	95%	80	£10,888	£0.87
	Morrisons, Pinner Road	3,286	80%	2,629	£12,150	£31.94
	Other Harrow MC	2,800	100%	2,800	£6,000	£16.80
	Other Wealdstone DC	2,500	100%	2,500	£6,000	£15.00
	Other Zone 1 - out of centre	1,300	100%	1,300	£6,000	£7.80
Zone 1 - Sub-total	17,078		15,053		£140.69	
2 - Harrow Southwest	Aldi, Northholt Road, South Harrow	1,741	80%	1,393	£10,904	£15.19
	Asda, Northholt Road	768	90%	691	£13,718	£9.48
	Iceland, Northholt Road, South Harrow	373	95%	354	£6,665	£2.36
	Iceland, Raynes Lane	438	95%	416	£8,045	£3.35
	Sainsbury's Local, Raynes Lane	391	95%	371	£11,690	£4.34
	Tesco Express, Alexandra Ave.	116	95%	110	£11,143	£1.23
	Tesco Express, Rayners Lane	261	95%	248	£11,058	£2.74
	Tesco Express, Shaftesbury Circle	192	95%	182	£11,058	£2.02
	Waitrose, Northholt Road	1,814	90%	1,633	£11,142	£18.19
	Other Rayners Lane DC	2,000	100%	2,000	£6,000	£12.00
	Other South Harrow DC	1,900	100%	1,900	£6,000	£11.40
	Other Sudbury Hill LC	700	100%	700	£6,000	£4.20
	Other Zone 2 - out of centre	1,700	100%	1,700	£7,000	£11.90
Zone 2 - Sub-total	12,394		11,699		£98.40	
3 - Harrow Northwest	Lidl, Bridge Street, Pinner	1,400	80%	1,120	£8,730	£9.78
	M&S Food Hall, Pinner	867	95%	824	£10,888	£8.97
	Morrisons, Uxbridge Road, Hatch End	3,064	80%	2,451	£12,150	£29.78
	Sainsbury's, Pinner	2,630	85%	2,236	£14,411	£32.22
	Tesco Express, 259 Pinner Road	344	95%	327	£13,477	£4.40
	Tesco Express, 503 Pinner Road	322	95%	306	£13,477	£4.12
	Tesco Express, Hatch End	155	95%	147	£13,477	£1.98
	Tesco Express, Whittington Way	174	95%	165	£13,477	£2.23
	Tesco, Ash Hill Drive	2,324	80%	1,859	£13,477	£25.06
	Other Hatch End LC	400	100%	400	£6,000	£2.40
	Other North Harrow DC	1,400	100%	1,400	£6,000	£8.40
	Other Pinner DC	600	100%	600	£6,000	£3.60
	Other Zone 3 - out of centre	1,200	100%	1,200	£6,000	£7.20
Zone 3 - Sub-total	14,880		13,035		£140.14	
4 - Harrow Northeast	Iceland, Harrow Weald	378	95%	359	£6,665	£2.39
	Lidl, Harrow Weald	1,036	80%	829	£8,730	£7.24
	Lidl, Stanmore	1,191	80%	953	£8,730	£8.32
	Sainsbury's, Stanmore	2,425	80%	1,940	£14,411	£27.96
	Tesco Express, Kenton Road	471	95%	447	£13,477	£6.03
	Waitrose, Harrow Weald	1,474	90%	1,327	£13,706	£18.18
	Other Belmont LC	500	100%	500	£6,000	£3.00
	Other Harrow Weald LC	700	100%	700	£6,000	£4.20
	Other Stanmore DC	900	100%	900	£6,000	£5.40
	Other Zone 4 - out of centre	1,500	100%	1,500	£6,000	£9.00
Zone 4 - Sub-total	10,575		9,455		£91.72	
5 - Harrow Southeast	Budgens, Kenton Road	316	95%	300	£7,936	£2.38
	Iceland, Burnt Oak	733	95%	696	£6,665	£4.64
	Iceland, Kingsbury Circle	399	95%	379	£6,665	£2.53
	Lidl, High St. Edgware	913	80%	730	£8,730	£6.38
	Tesco Express, Honeyput Lane	116	95%	110	£13,477	£1.49
	Tesco Express, Mollison Way	320	95%	304	£13,477	£4.10
	Tesco Express, Station Pr, Whitchurch Ln	174	95%	165	£13,477	£2.23
	Other Burnt Oak DC	1,500	100%	1,500	£6,000	£9.00
	Other Edgware DC	400	100%	400	£6,000	£2.40
	Other Kenton DC	1,800	100%	1,800	£6,000	£10.80
	Other Kingsbury DC	300	100%	300	£6,000	£1.80
	Other Queensbury LC	700	100%	700	£6,000	£4.20
	Other Zone 5 - out of centre	2,700	100%	2,700	£6,000	£16.20
Zone 5 - Sub-total	10,371		7,386		£68.14	
TOTAL	65,298		56,627		£539.08	

Source: LB Harrow Council Land Use Survey 2023, ORC StorePoint 2023 and GlobalData 2022

Table 11: Summary of convenience goods expenditure 2023 to 2041 (£M)

	2023	2026	2031	2036	2041
Available expenditure in LB Harrow					
Zone 1 Harrow Central	123.16	127.49	138.55	142.47	146.05
Zone 2 Harrow Southwest	96.87	96.88	97.65	99.06	101.37
Zone 3 Harrow Northwest	147.05	147.81	150.23	152.86	156.60
Zone 4 Harrow Northeast	107.90	108.22	111.06	113.33	116.17
Zone 5 Harrow Southeast	54.18	53.61	52.88	53.70	55.12
Total	529.16	534.00	550.36	561.42	575.31
Benchmark turnover of existing facilities					
Zone 1 Harrow Central	140.69	144.92	145.36	145.36	145.36
Zone 2 Harrow Southwest	98.40	101.46	101.76	101.76	101.76
Zone 3 Harrow Northwest	140.14	144.50	144.93	144.93	144.93
Zone 4 Harrow Northeast	91.72	94.57	94.85	94.85	94.85
Zone 5 Harrow Southeast	68.14	70.25	70.47	70.47	70.47
Total	539.08	555.70	557.37	557.37	557.37
Surplus/Deficit Expenditure (£m)					
Zone 1 Harrow Central	-17.53	-17.44	-6.81	-2.88	0.69
Zone 2 Harrow Southwest	-1.53	-4.58	-4.11	-2.70	-0.39
Zone 3 Harrow Northwest	6.91	3.31	5.30	7.93	11.67
Zone 4 Harrow Northeast	16.18	13.65	16.21	18.48	21.32
Zone 5 Harrow Southeast	-13.96	-16.64	-17.59	-16.76	-15.35
Total	-9.92	-21.69	-7.00	4.06	17.95

Source: Tables 5 to 10

Table 12: Convenience goods floorspace capacity 2023 to 2041

	2023	2026	2031	2036	2041
Turnover density new floorspace (£ per sq.m)	£12,000	£12,361	£12,398	£12,398	£12,398
Floorspace capacity (sq.m net)					
Zone 1 Harrow Central	-1,461	-1,411	-549	-233	56
Zone 2 Harrow Southwest	-127	-370	-332	-218	-31
Zone 3 Harrow Northwest	576	268	428	640	941
Zone 4 Harrow Northeast	1,348	1,104	1,307	1,490	1,720
Zone 5 Harrow Southeast	-1,163	-1,346	-1,419	-1,352	-1,238
Total	-827	-1,755	-565	327	1,448
Floorspace capacity (sq.m gross)					
Zone 1 Harrow Central	-2,087	-2,015	-785	-332	80
Zone 2 Harrow Southwest	-182	-529	-474	-311	-45
Zone 3 Harrow Northwest	823	383	611	914	1,344
Zone 4 Harrow Northeast	1,926	1,577	1,868	2,129	2,457
Zone 5 Harrow Southeast	-1,661	-1,923	-2,027	-1,931	-1,768
Total	-1,181	-2,507	-807	468	2,068

Appendix 4 Comparison goods assessment

Table 1: Study area population

Zone	2021	2023	2026	2031	2036	2041
Zone 1 Harrow Central	55,297	57,596	62,997	74,471	77,009	78,476
Zone 2 Harrow Southwest	57,148	58,577	59,145	58,764	59,183	60,486
Zone 3 Harrow Northwest	46,162	47,304	47,294	46,142	46,443	47,403
Zone 4 Harrow Northeast	46,618	47,817	47,639	47,480	47,936	48,774
Zone 5 Harrow Southeast	55,607	57,102	56,985	55,505	55,900	57,154
Zone 6 Brent North	66,949	67,638	68,171	69,171	70,416	71,433
Zone 7 Ealing North	47,237	47,074	46,720	46,504	46,552	46,809
Zone 8 Hillingdon Northeast	56,136	56,757	57,077	57,421	57,568	57,646
Total	431,154	439,865	446,028	455,458	461,007	468,181

Sources:

GLA 2021 based 10-year supply - constrained ward level projections for Zones 1 to 5
Experian population projections for Zone 6 to 8

Table 2: Comparison goods expenditure per person (£)

Zone	2023	2026	2031	2036	2041
Zone 1 Harrow Central	2,281	2,335	2,593	2,959	3,400
Zone 2 Harrow Southwest	2,149	2,200	2,443	2,787	3,202
Zone 3 Harrow Northwest	2,827	2,894	3,214	3,667	4,214
Zone 4 Harrow Northeast	2,615	2,677	2,972	3,391	3,897
Zone 5 Harrow Southeast	2,012	2,060	2,287	2,609	2,998
Zone 6 Brent North	2,199	2,251	2,500	2,852	3,277
Zone 7 Ealing North	1,959	2,006	2,227	2,541	2,920
Zone 8 Hillingdon Northeast	2,711	2,775	3,081	3,516	4,040

Sources:

Experian Local Expenditure 2021 (2021 prices)

Experian expenditure and SFT forecasts - Retail Planner Briefing Note 20 (February 2023)

Excludes Special Forms of Trading

Table 3: Total comparison goods expenditure (£m)

Zone	2023	2026	2031	2036	2041
Zone 1 Harrow Central	131.38	147.10	193.10	227.87	266.82
Zone 2 Harrow Southwest	125.88	130.12	143.56	164.94	193.68
Zone 3 Harrow Northwest	133.73	136.87	148.30	170.31	199.76
Zone 4 Harrow Northeast	125.04	127.53	141.11	162.55	190.07
Zone 5 Harrow Southeast	114.89	117.39	126.94	145.84	171.35
Zone 6 Brent North	148.74	153.45	172.93	200.83	234.09
Zone 7 Ealing North	92.22	93.72	103.56	118.29	136.68
Zone 8 Hillingdon Northeast	153.87	158.39	176.91	202.41	232.89
Total	1,025.74	1,064.57	1,206.42	1,393.04	1,625.33

Source: Tables 1 and 2

Table 4: Base year 2023 comparison goods market shares (%)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow
Zone 1 - Harrow Central									
Harrow town centre	26.3%	30.3%	14.3%	15.0%	20.3%	13.3%	15.8%	8.6%	5.0%
Wealdstone district centre	3.7%	0.0%	0.0%	2.1%	1.4%	1.4%	0.1%	1.0%	5.0%
Other Zone 1	0.9%	0.4%	0.6%	0.2%	0.4%	0.0%	0.2%	0.1%	2.0%
Sub-total - Zone 1	30.9%	30.7%	14.9%	17.3%	22.1%	14.7%	16.1%	9.7%	
Zone 2 - Harrow Southwest									
Raynes Lane district centre	0.8%	1.7%	2.1%	0.0%	0.0%	0.0%	0.0%	0.1%	5.0%
South Harrow district centre	5.6%	3.3%	1.0%	0.8%	0.1%	0.5%	2.7%	0.1%	5.0%
Other Zone 2	0.1%	0.1%	0.9%	0.0%	0.0%	0.0%	0.7%	0.0%	2.0%
Sub-total - Zone 1	6.5%	5.1%	4.0%	0.8%	0.1%	0.5%	3.4%	0.2%	
Zone 3 - Harrow Northwest									
Pinner district centre	0.9%	1.4%	15.0%	0.5%	0.3%	1.3%	0.8%	1.5%	2.0%
North Harrow district centre	2.7%	0.4%	1.9%	0.2%	0.0%	0.0%	0.0%	0.0%	2.0%
Hatch End	0.9%	0.1%	3.2%	0.6%	0.1%	0.0%	0.0%	0.1%	2.0%
Other Zone 3	0.0%	0.0%	0.5%	0.0%	0.0%	0.2%	0.1%	0.0%	1.0%
Sub-total - Zone 3	4.5%	1.9%	20.6%	1.3%	0.4%	1.5%	0.9%	1.6%	
Zone 4 - Harrow Northeast									
Stanmore district centre	0.3%	0.0%	0.3%	4.7%	0.9%	0.0%	0.0%	0.0%	2.0%
Harrow Weald	0.3%	0.0%	0.5%	1.6%	0.0%	0.0%	0.0%	0.0%	2.0%
Other Zone 4	1.3%	0.2%	0.3%	2.8%	1.1%	0.9%	0.1%	0.0%	1.0%
Sub-total - Zone 4	1.9%	0.2%	1.1%	9.1%	2.0%	0.9%	0.1%	0.0%	
Zone 5 - Harrow Southeast									
Other Zone 5	1.1%	0.1%	0.4%	3.6%	8.6%	4.4%	0.0%	0.8%	50.0%
Sub-total - Zone 5	1.1%	0.1%	0.4%	3.6%	8.6%	4.4%	0.0%	0.8%	
LB Harrow total	44.9%	38.0%	41.0%	32.1%	33.2%	22.0%	20.5%	12.3%	
Zone 6 Brent North	0.8%	0.0%	0.0%	1.6%	4.0%	6.1%	0.1%	0.3%	n/a
Zone 7 Ealing North	2.5%	6.1%	1.2%	0.9%	3.5%	3.9%	18.8%	5.4%	n/a
Zone 8 Hillingdon Northeast	4.8%	24.2%	11.6%	3.3%	5.6%	1.6%	17.2%	33.5%	n/a
Sub-total - Zones 6 to 8	8.1%	30.3%	12.8%	5.8%	13.1%	11.6%	36.1%	39.2%	0.0%
Outside study area									
LB Barnet	0.8%	0.4%	0.9%	5.4%	8.3%	2.3%	0.4%	1.5%	
LB Brent	5.6%	1.3%	0.4%	2.2%	11.1%	18.0%	3.3%	2.7%	
LB Ealing	0.0%	1.2%	0.0%	0.0%	0.0%	0.6%	12.8%	0.4%	
LB Hillingdon	1.6%	6.1%	1.8%	6.3%	2.5%	2.2%	7.7%	18.6%	
Hertsmere	1.7%	0.0%	0.0%	3.5%	1.1%	1.6%	0.8%	0.0%	
Watford	14.3%	5.3%	25.1%	19.3%	7.4%	6.8%	0.5%	12.8%	
Brent Cross	7.1%	3.7%	3.6%	13.5%	14.0%	16.3%	2.0%	1.5%	
Central London	1.5%	3.8%	6.7%	6.3%	3.3%	4.2%	0.6%	1.0%	
Other	14.4%	9.9%	7.7%	5.6%	6.0%	14.4%	15.3%	10.0%	
Elsewhere Sub-Total	47.0%	31.7%	46.2%	62.1%	53.7%	66.4%	43.4%	48.5%	
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	

Source: NEMS Household Survey August 2023 - with Lichfield's analysis

Table 5: Base year 2023 comparison goods shopping patterns (£M)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Expenditure 2023	131.38	125.88	133.73	125.04	114.89	148.74	92.22	153.87		1,025.74
Zone 1 - Harrow Central										
Harrow town centre	34.55	38.14	19.12	18.76	23.32	19.78	14.57	13.23	0.05	181.53
Wealdstone district centre	4.86	0.00	0.00	2.63	1.61	2.08	0.09	1.54	1.05	13.86
Other Zone 1	1.18	0.50	0.80	0.25	0.46	0.00	0.18	0.15	2.05	5.59
Sub-total - Zone 1	40.60	38.65	19.93	21.63	25.39	21.86	14.85	14.93	3.15	200.98
Zone 2 - Harrow Southwest										
Raynes Lane district centre	1.05	2.14	2.81	0.00	0.00	0.00	0.00	0.15	2.05	8.20
South Harrow district centre	7.36	4.15	1.34	1.00	0.11	0.74	2.49	0.15	3.05	20.40
Other Zone 2	0.13	0.13	1.20	0.00	0.00	0.00	0.65	0.00	4.05	6.16
Sub-total - Zone 2	8.54	6.42	5.35	1.00	0.11	0.74	3.14	0.31	9.15	34.76
Zone 3 - Harrow Northwest										
Pinner district centre	1.18	1.76	20.06	0.63	0.34	1.93	0.74	2.31	2.05	31.00
North Harrow district centre	3.55	0.50	2.54	0.25	0.00	0.00	0.00	0.00	3.05	9.89
Hatch End	1.18	0.13	4.28	0.75	0.11	0.00	0.00	0.15	4.05	10.66
Other Zone 3	0.00	0.00	0.67	0.00	0.00	0.30	0.09	0.00	5.05	6.11
Sub-total - Zone 3	5.91	2.39	27.55	1.63	0.46	2.23	0.83	2.46	14.20	57.66
Zone 4 - Harrow Northeast										
Stanmore district centre	0.39	0.00	0.40	5.88	1.03	0.00	0.00	0.00	4.05	11.76
Harrow Weald	0.39	0.00	0.67	2.00	0.00	0.00	0.00	0.00	5.05	8.11
Other Zone 4	1.71	0.25	0.40	3.50	1.26	1.34	0.09	0.00	6.05	14.61
Sub-total - Zone 4	2.50	0.25	1.47	11.38	2.30	1.34	0.09	0.00	15.15	34.48
Zone 5 - Harrow Southeast										
Other Zone 5	1.45	0.13	0.53	4.50	9.88	6.54	0.00	1.23	4.05	28.31
Sub-total - Zone 5	1.45	0.13	0.53	4.50	9.88	6.54	0.00	1.23	4.05	28.31
LB Harrow total	58.99	47.84	54.83	40.14	38.14	32.72	18.90	18.93		356.19
Zone 6 Brent North	1.05	0.00	0.00	2.00	4.60	9.07	0.09	0.46	n/a	17.27
Zone 7 Ealing North	3.28	7.68	1.60	1.13	4.02	5.80	17.34	8.31	n/a	49.16
Zone 8 Hillingdon Northeast	6.31	30.46	15.51	4.13	6.43	2.38	15.86	51.55	n/a	132.63
Sub-total - Zones 6 to 8	10.64	38.14	17.12	7.25	15.05	17.25	33.29	60.32	4.05	583.56
Outside study area										
LB Barnet	1.05	0.50	1.20	6.75	9.54	3.42	0.37	2.31	n/a	25.14
LB Brent	7.36	1.64	0.53	2.75	12.75	26.77	3.04	4.15	n/a	59.00
LB Ealing	0.00	1.51	0.00	0.00	0.00	0.89	11.80	0.62	n/a	14.82
LB Hillingdon	2.10	7.68	2.41	7.88	2.87	3.27	7.10	28.62	n/a	61.93
Hertsmere	2.23	0.00	0.00	4.38	1.26	2.38	0.74	0.00	n/a	10.99
Watford	18.79	6.67	33.57	24.13	8.50	10.11	0.46	19.70	n/a	121.93
Brent Cross	9.33	4.66	4.81	16.88	16.08	24.24	1.84	2.31	n/a	80.16
Central London	1.97	4.78	8.96	7.88	3.79	6.25	0.55	1.54	n/a	35.72
Other	18.92	12.46	10.30	7.00	6.89	21.42	14.11	15.39	n/a	106.49
Eslewhere Sub-Total	61.75	39.90	61.78	77.65	61.70	98.76	40.02	74.63	n/a	516.19
TOTAL	131.38	125.88	133.73	125.04	114.89	148.74	92.22	153.87		

Source: NEMS Household Survey August 2023 - with Lichfield's analysis

Table 5: Base year 2023 comparison goods shopping patterns (£M)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Expenditure 2023	131.38	125.88	133.73	125.04	114.89	148.74	92.22	153.87		1,025.74
Zone 1 - Harrow Central										
Harrow town centre	34.55	38.14	19.12	18.76	23.32	19.78	14.57	13.23	0.05	181.53
Wealdstone district centre	4.86	0.00	0.00	2.63	1.61	2.08	0.09	1.54	1.05	13.86
Other Zone 1	1.18	0.50	0.80	0.25	0.46	0.00	0.18	0.15	2.05	5.59
Sub-total - Zone 1	40.60	38.65	19.93	21.63	25.39	21.86	14.85	14.93	3.15	200.98
Zone 2 - Harrow Southwest										
Raynes Lane district centre	1.05	2.14	2.81	0.00	0.00	0.00	0.00	0.15	2.05	8.20
South Harrow district centre	7.36	4.15	1.34	1.00	0.11	0.74	2.49	0.15	3.05	20.40
Other Zone 2	0.13	0.13	1.20	0.00	0.00	0.00	0.65	0.00	4.05	6.16
Sub-total - Zone 1	8.54	6.42	5.35	1.00	0.11	0.74	3.14	0.31	9.15	34.76
Zone 3 - Harrow Northwest										
Pinner district centre	1.18	1.76	20.06	0.63	0.34	1.93	0.74	2.31	2.05	31.00
North Harrow district centre	3.55	0.50	2.54	0.25	0.00	0.00	0.00	0.00	3.05	9.89
Hatch End	1.18	0.13	4.28	0.75	0.11	0.00	0.00	0.15	4.05	10.66
Other Zone 3	0.00	0.00	0.67	0.00	0.00	0.30	0.09	0.00	5.05	6.11
Sub-total - Zone 3	5.91	2.39	27.55	1.63	0.46	2.23	0.83	2.46	14.20	57.66
Zone 4 - Harrow Northeast										
Stanmore district centre	0.39	0.00	0.40	5.88	1.03	0.00	0.00	0.00	4.05	11.76
Harrow Weald	0.39	0.00	0.67	2.00	0.00	0.00	0.00	0.00	5.05	8.11
Other Zone 4	1.71	0.25	0.40	3.50	1.26	1.34	0.09	0.00	6.05	14.61
Sub-total - Zone 4	2.50	0.25	1.47	11.38	2.30	1.34	0.09	0.00	15.15	34.48
Zone 5 - Harrow Southeast										
Other Zone 5	1.45	0.13	0.53	4.50	9.88	6.54	0.00	1.23	4.05	28.31
Sub-total - Zone 5	1.45	0.13	0.53	4.50	9.88	6.54	0.00	1.23	4.05	28.31
LB Harrow total	58.99	47.84	54.83	40.14	38.14	32.72	18.90	18.93		356.19
Zone 6 Brent North	1.05	0.00	0.00	2.00	4.60	9.07	0.09	0.46	n/a	17.27
Zone 7 Ealing North	3.28	7.68	1.60	1.13	4.02	5.80	17.34	8.31	n/a	49.16
Zone 8 Hillingdon Northeast	6.31	30.46	15.51	4.13	6.43	2.38	15.86	51.55	n/a	132.63
Sub-total - Zones 6 to 8	10.64	38.14	17.12	7.25	15.05	17.25	33.29	60.32	4.05	583.56
Outside study area										
LB Barnet	1.05	0.50	1.20	6.75	9.54	3.42	0.37	2.31	n/a	25.14
LB Brent	7.36	1.64	0.53	2.75	12.75	26.77	3.04	4.15	n/a	59.00
LB Ealing	0.00	1.51	0.00	0.00	0.00	0.89	11.80	0.62	n/a	14.82
LB Hillingdon	2.10	7.68	2.41	7.88	2.87	3.27	7.10	28.62	n/a	61.93
Hertsmere	2.23	0.00	0.00	4.38	1.26	2.38	0.74	0.00	n/a	10.99
Watford	18.79	6.67	33.57	24.13	8.50	10.11	0.46	19.70	n/a	121.93
Brent Cross	9.33	4.66	4.81	16.88	16.08	24.24	1.84	2.31	n/a	80.16
Central London	1.97	4.78	8.96	7.88	3.79	6.25	0.55	1.54	n/a	35.72
Other	18.92	12.46	10.30	7.00	6.89	21.42	14.11	15.39	n/a	106.49
Eslewhere Sub-Total	61.75	39.90	61.78	77.65	61.70	98.76	40.02	74.63	n/a	516.19
TOTAL	131.38	125.88	133.73	125.04	114.89	148.74	92.22	153.87		

Source: NEMS Household Survey August 2023 - with Lichfield's analysis

Table 7: Future 2031 comparison goods shopping patterns (£M)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Expenditure 2031	193.10	143.56	148.30	141.11	126.94	172.93	103.56	176.91		1,206.42
Zone 1 - Harrow Central										
Harrow town centre	50.79	43.50	21.21	21.17	25.77	23.00	16.36	15.21	0.05	217.05
Wealdstone district centre	7.14	0.00	0.00	2.96	1.78	2.42	0.10	1.77	1.05	17.23
Other Zone 1	1.74	0.57	0.89	0.28	0.51	0.00	0.21	0.18	2.05	6.43
Sub-total - Zone 1	59.67	44.07	22.10	24.41	28.05	25.42	16.67	17.16	3.15	240.71
Zone 2 - Harrow Southwest										
Raynes Lane district centre	1.54	2.44	3.11	0.00	0.00	0.00	0.00	0.18	2.05	9.33
South Harrow district centre	10.81	4.74	1.48	1.13	0.13	0.86	2.80	0.18	3.05	25.18
Other Zone 2	0.19	0.14	1.33	0.00	0.00	0.00	0.72	0.00	4.05	6.45
Sub-total - Zone 1	12.55	7.32	5.93	1.13	0.13	0.86	3.52	0.35	9.15	40.95
Zone 3 - Harrow Northwest										
Pinner district centre	1.74	2.01	22.25	0.71	0.38	2.25	0.83	2.65	2.05	34.86
North Harrow district centre	5.21	0.57	2.82	0.28	0.00	0.00	0.00	0.00	3.05	11.94
Hatch End	1.74	0.14	4.75	0.85	0.13	0.00	0.00	0.18	4.05	11.83
Other Zone 3	0.00	0.00	0.74	0.00	0.00	0.35	0.10	0.00	5.05	6.24
Sub-total - Zone 3	8.69	2.73	30.55	1.83	0.51	2.59	0.93	2.83	14.20	64.87
Zone 4 - Harrow Northeast										
Stanmore district centre	0.58	0.00	0.44	6.63	1.14	0.00	0.00	0.00	4.05	12.85
Harrow Weald	0.58	0.00	0.74	2.26	0.00	0.00	0.00	0.00	5.05	8.63
Other Zone 4	2.51	0.29	0.44	3.95	1.40	1.56	0.10	0.00	6.05	16.30
Sub-total - Zone 4	3.67	0.29	1.63	12.84	2.54	1.56	0.10	0.00	15.15	37.78
Zone 5 - Harrow Southeast										
Other Zone 5	2.12	0.14	0.59	5.08	10.92	7.61	0.00	1.42	4.05	31.93
Sub-total - Zone 5	2.12	0.14	0.59	5.08	10.92	7.61	0.00	1.42	4.05	31.93
LB Harrow total	86.70	54.55	60.80	45.30	42.14	38.04	21.23	21.76		416.24
Zone 6 Brent North	1.54	0.00	0.00	2.26	5.08	10.55	0.10	0.53	n/a	20.06
Zone 7 Ealing North	4.83	8.76	1.78	1.27	4.44	6.74	19.47	9.55	n/a	56.84
Zone 8 Hillingdon Northeast	9.27	34.74	17.20	4.66	7.11	2.77	17.81	59.27	n/a	152.82
Sub-total - Zones 6 to 8	15.64	43.50	18.98	8.18	16.63	20.06	37.39	69.35	4.05	677.90
Outside study area										
LB Barnet	1.54	0.57	1.33	7.62	10.54	3.98	0.41	2.65	n/a	28.66
LB Brent	10.81	1.87	0.59	3.10	14.09	31.13	3.42	4.78	n/a	69.79
LB Ealing	0.00	1.72	0.00	0.00	0.00	1.04	13.26	0.71	n/a	16.72
LB Hillingdon	3.09	8.76	2.67	8.89	3.17	3.80	7.97	32.91	n/a	71.26
Hertsmere	3.28	0.00	0.00	4.94	1.40	2.77	0.83	0.00	n/a	13.21
Watford	27.61	7.61	37.22	27.23	9.39	11.76	0.52	22.65	n/a	144.00
Brent Cross	13.71	5.31	5.34	19.05	17.77	28.19	2.07	2.65	n/a	94.09
Central London	2.90	5.46	9.94	8.89	4.19	7.26	0.62	1.77	n/a	41.02
Other	27.81	14.21	11.42	7.90	7.62	24.90	15.85	17.69	n/a	127.40
Eslewhere Sub-Total	90.76	45.51	68.51	87.63	68.17	114.82	44.95	85.80	n/a	606.15
TOTAL	193.10	143.56	148.30	141.11	126.94	172.93	103.56	176.91		

Source: NEMS Household Survey August 2023 - with Lichfield's analysis

Table 8: Future 2036 comparison goods shopping patterns (£M)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Expenditure 2036	227.87	164.94	170.31	162.55	145.84	200.83	118.29	202.41		1,393.04
Zone 1 - Harrow Central										
Harrow town centre	59.93	49.98	24.35	24.38	29.61	26.71	18.69	17.41	0.05	251.11
Wealdstone district centre	8.43	0.00	0.00	3.41	2.04	2.81	0.12	2.02	1.05	19.89
Other Zone 1	2.05	0.66	1.02	0.33	0.58	0.00	0.24	0.20	2.05	7.13
Sub-total - Zone 1	70.41	50.64	25.38	28.12	32.23	29.52	19.04	19.63	3.15	278.13
Zone 2 - Harrow Southwest										
Raynes Lane district centre	1.82	2.80	3.58	0.00	0.00	0.00	0.00	0.20	2.05	10.46
South Harrow district centre	12.76	5.44	1.70	1.30	0.15	1.00	3.19	0.20	3.05	28.80
Other Zone 2	0.23	0.16	1.53	0.00	0.00	0.00	0.83	0.00	4.05	6.80
Sub-total - Zone 2	14.81	8.41	6.81	1.30	0.15	1.00	4.02	0.40	9.15	46.06
Zone 3 - Harrow Northwest										
Pinner district centre	2.05	2.31	25.55	0.81	0.44	2.61	0.95	3.04	2.05	39.80
North Harrow district centre	6.15	0.66	3.24	0.33	0.00	0.00	0.00	0.00	3.05	13.42
Hatch End	2.05	0.16	5.45	0.98	0.15	0.00	0.00	0.20	4.05	13.04
Other Zone 3	0.00	0.00	0.85	0.00	0.00	0.40	0.12	0.00	5.05	6.42
Sub-total - Zone 3	10.25	3.13	35.08	2.11	0.58	3.01	1.06	3.24	14.20	72.68
Zone 4 - Harrow Northeast										
Stanmore district centre	0.68	0.00	0.51	7.64	1.31	0.00	0.00	0.00	4.05	14.20
Harrow Weald	0.68	0.00	0.85	2.60	0.00	0.00	0.00	0.00	5.05	9.19
Other Zone 4	2.96	0.33	0.51	4.55	1.60	1.81	0.12	0.00	6.05	17.93
Sub-total - Zone 4	4.33	0.33	1.87	14.79	2.92	1.81	0.12	0.00	15.15	41.32
Zone 5 - Harrow Southeast										
Other Zone 5	2.51	0.16	0.68	5.85	12.54	8.84	0.00	1.62	4.05	36.25
Sub-total - Zone 5	2.51	0.16	0.68	5.85	12.54	8.84	0.00	1.62	4.05	36.25
LB Harrow total	102.31	62.68	69.83	52.18	48.42	44.18	24.25	24.90		474.44
Zone 6 Brent North	1.82	0.00	0.00	2.60	5.83	12.25	0.12	0.61	n/a	23.23
Zone 7 Ealing North	5.70	10.06	2.04	1.46	5.10	7.83	22.24	10.93	n/a	65.37
Zone 8 Hillingdon Northeast	10.94	39.92	19.76	5.36	8.17	3.21	20.35	67.81	n/a	175.51
Sub-total - Zones 6 to 8	18.46	49.98	21.80	9.43	19.11	23.30	42.70	79.34	4.05	774.81
Outside study area										
LB Barnet	1.82	0.66	1.53	8.78	12.10	4.62	0.47	3.04	n/a	33.03
LB Brent	12.76	2.14	0.68	3.58	16.19	36.15	3.90	5.47	n/a	80.87
LB Ealing	0.00	1.98	0.00	0.00	0.00	1.20	15.14	0.81	n/a	19.13
LB Hillingdon	3.65	10.06	3.07	10.24	3.65	4.42	9.11	37.65	n/a	81.83
Hertsmere	3.87	0.00	0.00	5.69	1.60	3.21	0.95	0.00	n/a	15.33
Watford	32.59	8.74	42.75	31.37	10.79	13.66	0.59	25.91	n/a	166.39
Brent Cross	16.18	6.10	6.13	21.94	20.42	32.73	2.37	3.04	n/a	108.91
Central London	3.42	6.27	11.41	10.24	4.81	8.43	0.71	2.02	n/a	47.32
Other	32.81	16.33	13.11	9.10	8.75	28.92	18.10	20.24	n/a	147.37
Eslewhere Sub-Total	107.10	52.29	78.68	100.94	78.32	133.35	51.34	98.17	n/a	700.18
TOTAL	227.87	164.94	170.31	162.55	145.84	200.83	118.29	202.41		

Source: NEMS Household Survey August 2023 - with Lichfield's analysis

Table 9: Future 2041 comparison goods shopping patterns (£M)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Expenditure 2041	266.82	193.68	199.76	190.07	171.35	234.09	136.68	232.89		1,625.33
Zone 1 - Harrow Central										
Harrow town centre	70.17	58.68	28.57	28.51	34.78	31.13	21.60	20.03	0.05	293.52
Wealdstone district centre	9.87	0.00	0.00	3.99	2.40	3.28	0.14	2.33	1.05	23.06
Other Zone 1	2.40	0.77	1.20	0.38	0.69	0.00	0.27	0.23	2.05	8.00
Sub-total - Zone 1	82.45	59.46	29.76	32.88	37.87	34.41	22.01	22.59	3.15	324.58
Zone 2 - Harrow Southwest										
Raynes Lane district centre	2.13	3.29	4.19	0.00	0.00	0.00	0.00	0.23	2.05	11.90
South Harrow district centre	14.94	6.39	2.00	1.52	0.17	1.17	3.69	0.23	3.05	33.17
Other Zone 2	0.27	0.19	1.80	0.00	0.00	0.00	0.96	0.00	4.05	7.27
Sub-total - Zone 1	17.34	9.88	7.99	1.52	0.17	1.17	4.65	0.47	9.15	52.34
Zone 3 - Harrow Northwest										
Pinner district centre	2.40	2.71	29.96	0.95	0.51	3.04	1.09	3.49	2.05	46.22
North Harrow district centre	7.20	0.77	3.80	0.38	0.00	0.00	0.00	0.00	3.05	15.20
Hatch End	2.40	0.19	6.39	1.14	0.17	0.00	0.00	0.23	4.05	14.58
Other Zone 3	0.00	0.00	1.00	0.00	0.00	0.47	0.14	0.00	5.05	6.65
Sub-total - Zone 3	12.01	3.68	41.15	2.47	0.69	3.51	1.23	3.73	14.20	82.66
Zone 4 - Harrow Northeast										
Stanmore district centre	0.80	0.00	0.60	8.93	1.54	0.00	0.00	0.00	4.05	15.93
Harrow Weald	0.80	0.00	1.00	3.04	0.00	0.00	0.00	0.00	5.05	9.89
Other Zone 4	3.47	0.39	0.60	5.32	1.88	2.11	0.14	0.00	6.05	19.96
Sub-total - Zone 4	5.07	0.39	2.20	17.30	3.43	2.11	0.14	0.00	15.15	45.77
Zone 5 - Harrow Southeast										
Other Zone 5	2.94	0.19	0.80	6.84	14.74	10.30	0.00	1.86	4.05	41.72
Sub-total - Zone 5	2.94	0.19	0.80	6.84	14.74	10.30	0.00	1.86	4.05	41.72
LB Harrow total	119.80	73.60	81.90	61.01	56.89	51.50	28.02	28.65		547.06
Zone 6 Brent North	2.13	0.00	0.00	3.04	6.85	14.28	0.14	0.70	n/a	27.14
Zone 7 Ealing North	6.67	11.81	2.40	1.71	6.00	9.13	25.70	12.58	n/a	75.99
Zone 8 Hillingdon Northeast	12.81	46.87	23.17	6.27	9.60	3.75	23.51	78.02	n/a	203.99
Sub-total - Zones 6 to 8	21.61	58.68	25.57	11.02	22.45	27.15	49.34	91.29	4.05	895.91
Outside study area										
LB Barnet	2.13	0.77	1.80	10.26	14.22	5.38	0.55	3.49	n/a	38.62
LB Brent	14.94	2.52	0.80	4.18	19.02	42.14	4.51	6.29	n/a	94.39
LB Ealing	0.00	2.32	0.00	0.00	0.00	1.40	17.50	0.93	n/a	22.16
LB Hillingdon	4.27	11.81	3.60	11.97	4.28	5.15	10.52	43.32	n/a	94.93
Hertsmere	4.54	0.00	0.00	6.65	1.88	3.75	1.09	0.00	n/a	17.91
Watford	38.16	10.26	50.14	36.68	12.68	15.92	0.68	29.81	n/a	194.33
Brent Cross	18.94	7.17	7.19	25.66	23.99	38.16	2.73	3.49	n/a	127.33
Central London	4.00	7.36	13.38	11.97	5.65	9.83	0.82	2.33	n/a	55.36
Other	38.42	19.17	15.38	10.64	10.28	33.71	20.91	23.29	n/a	171.81
Eslewhere Sub-Total	125.40	61.40	92.29	118.03	92.01	155.43	59.32	112.95	n/a	816.84
TOTAL	266.82	193.68	199.76	190.07	171.35	234.09	136.68	232.89		

Source: NEMS Household Survey August 2023 - with Lichfield's analysis

Table 10: Comparison goods retail floorspace

Zone	Gross floorspace (sq.m)	Sales floorspace (sq.m net)
1 - Harrow Central		
Harrow MC	52,328	35,060
Wealdstone DC	4,358	2,920
Other Zone 1 - out of centre	1,467	983
Comparison goods sales in food stores	n/a	4,525
	58,153	43,488
2 - Harrow Southwest		
Rayners Lane DC	3,007	2,015
South Harrow DC	2,679	1,795
Sudbury Hill LC	380	255
Other Zone 2 - out of centre	2,675	1,792
Comparison goods sales in food stores	n/a	695
	8,741	6,551
3 - Harrow Northwest		
Hatch End LC	2,536	1,699
North Harrow DC	1,520	1,018
Pinner DC	4,320	2,894
Other Zone 3 - out of centre	1,461	979
Comparison goods sales in food stores	n/a	1,532
	9,837	8,123
4 - Harrow Northeast		
Belmont LC	808	541
Harrow Weald LC	953	639
Stanmore DC	2,045	1,370
Other Zone 4 - out of centre	2,015	1,350
Comparison goods sales in food stores	n/a	999
	5,821	4,899
5 - Harrow Southeast		
Burnt Oak DC	3,474	2,328
Edgware DC	720	482
Kenton DC	3,920	2,626
Queensbury LC	1,718	1,151
Other Zone 5 - out of centre	2,576	1,726
Comparison goods sales in food stores	n/a	286
	12,408	8,599
	94,960	71,660

Source: LB Harrow land use survey July 2023

Table 10: Comparison goods retail floorspace

Zone	Gross floorspace (sq.m)	Sales floorspace (sq.m net)
1 - Harrow Central		
Harrow MC	52,328	35,060
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Other Zone 1 - out of centre	1,467	983
Comparison goods sales in food stores	n/a	4,525
	58,153	43,488
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Harrow Weald LC	953	639
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Other Zone 4 - out of centre	2,015	1,350
Comparison goods sales in food stores	n/a	999
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Edgware DC	720	482
Kenton DC	3,920	2,626
Queensbury LC	1,718	1,151
Other Zone 5 - out of centre	2,576	1,726
Comparison goods sales in food stores	n/a	286
	12,408	8,599
	94,960	71,660

Source: LB Harrow land use survey July 2023

Table 12: Comparison goods floorspace capacity 2023 to 2041

	2023	2026	2031	2036	2041
Turnover density new floorspace (£ per sq.m)	£6,000	£6,217	£6,973	£8,005	£9,190
Floorspace capacity (sq.m net)					
Zone 1 Harrow Central	0	273	1,026	1,248	1,821
Zone 2 Harrow Southwest	0	34	80	-39	-99
Zone 3 Harrow Northwest	0	-73	-307	-530	-616
Zone 4 Harrow Northeast	0	-94	-328	-585	-766
Zone 5 Harrow Southeast	0	-46	-139	-190	-179
Total	0	93	331	-96	162
Floorspace capacity (sq.m gross)					
Zone 1 Harrow Central	0	365	1,368	1,664	2,428
Zone 2 Harrow Southwest	0	45	106	-52	-132
Zone 3 Harrow Northwest	0	-98	-409	-707	-821
Zone 4 Harrow Northeast	0	-126	-438	-779	-1,021
Zone 5 Harrow Southeast	0	-62	-186	-254	-239
Total	0	124	442	-128	216

Appendix 5 Food/beverage assessment

Table 1: Study area population

Zone	2021	2023	2026	2031	2036	2041
Zone 1 Harrow Central	55,297	57,596	62,997	74,471	77,009	78,476
Zone 2 Harrow Southwest	57,148	58,577	59,145	58,764	59,183	60,486
Zone 3 Harrow Northwest	46,162	47,304	47,294	46,142	46,443	47,403
Zone 4 Harrow Northeast	46,618	47,817	47,639	47,480	47,936	48,774
Zone 5 Harrow Southeast	55,607	57,102	56,985	55,505	55,900	57,154
Zone 6 Brent North	66,949	67,638	68,171	69,171	70,416	71,433
Zone 7 Ealing North	47,237	47,074	46,720	46,504	46,552	46,809
Zone 8 Hillingdon Northeast	56,136	56,757	57,077	57,421	57,568	57,646
Total	431,154	439,865	446,028	455,458	461,007	468,181

Sources: *GLA 2021 based 10-year supply - constrained ward level projections for Zones 1 to 5*
Experian population projections for Zone 6 to 8

Table 2: Food and beverage expenditure per person (£)

Zone	2023	2026	2031	2036	2041
Zone 1 Harrow Central	1,943	1,979	2,075	2,170	2,270
Zone 2 Harrow Southwest	1,794	1,827	1,916	2,004	2,096
Zone 3 Harrow Northwest	1,963	1,998	2,096	2,192	2,293
Zone 4 Harrow Northeast	1,832	1,865	1,956	2,046	2,140
Zone 5 Harrow Southeast	1,561	1,590	1,667	1,744	1,824
Zone 6 Brent North	1,649	1,678	1,761	1,841	1,926
Zone 7 Ealing North	1,633	1,662	1,744	1,824	1,907
Zone 8 Hillingdon Northeast	1,846	1,880	1,972	2,062	2,157

Sources: *Experian Local Expenditure 2021 (2021 prices)*
Experian expenditure forecasts - Retail Planner Briefing Note 20 (February 2023)

Table 3: Total food and beverage expenditure (£m)

Zone	2023	2026	2031	2036	2041
Zone 1 Harrow Central	111.91	124.67	154.53	167.11	178.14
Zone 2 Harrow Southwest	105.09	108.06	112.59	118.60	126.78
Zone 3 Harrow Northwest	92.86	94.49	96.71	101.80	108.70
Zone 4 Harrow Northeast	87.60	88.85	92.87	98.08	104.38
Zone 5 Harrow Southeast	89.14	90.61	92.53	97.49	104.25
Zone 6 Brent North	111.54	114.39	121.81	129.64	137.58
Zone 7 Ealing North	76.87	77.65	81.10	84.91	89.26
Zone 8 Hillingdon Northeast	104.77	107.30	113.23	118.71	124.34
Total	779.77	806.02	865.38	916.33	973.43

Source: Tables 1 and 2

Table 4: Base year 2023 food and beverage market shares (%)

Location	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow
Zone 1 - Harrow Central									
Harrow town centre	27.5%	20.8%	3.7%	20.2%	13.4%	12.0%	6.4%	10.4%	5.0%
Wealdstone district centre	5.6%	0.0%	0.0%	0.0%	0.0%	0.0%	2.8%	0.0%	5.0%
Sub-total - Zone 1	33.1%	20.8%	3.7%	20.2%	13.4%	12.0%	9.2%	10.4%	
Zone 2 - Harrow Southwest									
Raynes Lane district centre	0.3%	10.7%	2.0%	0.0%	0.0%	0.0%	2.4%	1.7%	5.0%
South Harrow district centre	0.0%	6.4%	0.0%	0.6%	0.0%	3.6%	10.4%	0.0%	5.0%
Other Zone 2	1.8%	7.1%	0.0%	0.0%	0.0%	0.0%	0.6%	0.0%	2.0%
Sub-total - Zone 1	2.1%	24.2%	2.0%	0.6%	0.0%	3.6%	13.4%	1.7%	
Zone 3 - Harrow Northwest									
Pinner district centre	7.9%	4.0%	34.0%	0.6%	3.3%	2.1%	0.0%	7.6%	2.0%
North Harrow district centre	0.9%	0.9%	0.4%	0.0%	0.0%	2.3%	0.0%	0.0%	2.0%
Hatch End	9.4%	0.0%	12.3%	6.6%	7.6%	3.1%	0.0%	0.4%	2.0%
Sub-total - Zone 3	18.2%	4.9%	46.7%	7.2%	10.9%	7.5%	0.0%	8.0%	
Zone 4 - Harrow Northeast									
Stanmore district centre	0.0%	0.0%	2.8%	13.8%	9.4%	3.3%	0.0%	0.0%	2.0%
Harrow Weald	8.3%	3.2%	0.4%	6.3%	4.0%	0.0%	0.0%	0.6%	2.0%
Other Zone 4	0.9%	1.5%	0.0%	6.9%	3.8%	0.0%	0.0%	0.0%	1.0%
Sub-total - Zone 4	9.2%	4.7%	3.2%	27.0%	17.2%	3.3%	0.0%	0.6%	
Zone 5 - Harrow Southeast									
Other Zone 5	1.5%	0.7%	0.0%	3.9%	10.7%	6.7%	0.0%	0.0%	50.0%
Sub-total - Zone 5	1.5%	0.7%	0.0%	3.9%	10.7%	6.7%	0.0%	0.0%	
LB Harrow total	64.1%	55.3%	55.6%	58.9%	52.2%	33.1%	22.6%	20.7%	
Zone 6 Brent North	4.2%	0.0%	4.2%	0.0%	11.1%	7.8%	0.4%	0.4%	n/a
Zone 7 Ealing North	1.1%	2.5%	2.4%	0.4%	1.1%	0.0%	17.6%	2.1%	n/a
Zone 8 Hillingdon Northeast	1.1%	5.2%	4.6%	0.0%	0.0%	0.0%	3.3%	20.8%	n/a
Sub-total - Zones 6 to 8	6.4%	7.7%	11.2%	0.4%	12.2%	7.8%	21.3%	23.3%	0.0%
Outside study area									
LB Barnet	0.6%	0.0%	2.2%	6.5%	4.7%	3.7%	1.8%	2.3%	
LB Brent	0.0%	4.2%	2.7%	1.1%	0.8%	11.1%	11.0%	0.0%	
LB Ealing	0.0%	4.6%	0.0%	0.0%	0.0%	1.8%	12.0%	0.0%	
LB Hillingdon	1.1%	10.5%	10.2%	0.0%	4.0%	0.6%	9.4%	25.9%	
Hertsmere	0.0%	0.0%	0.0%	0.6%	0.5%	0.6%	3.2%	0.0%	
Watford	4.8%	1.1%	6.6%	9.2%	6.0%	3.2%	0.0%	1.2%	
Central London	9.7%	3.2%	7.1%	9.6%	13.6%	19.9%	5.2%	10.5%	
Other	13.3%	13.4%	4.4%	13.7%	6.0%	18.2%	13.5%	16.1%	
Elsewhere Sub-Total	29.5%	37.0%	33.2%	40.7%	35.6%	59.1%	56.1%	56.0%	
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	

Source: NEMS Household Survey August 2023 - with Lichfield's analysis

Table 5: Base year 2023 food and beverage patterns (£M)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Expenditure 2023	111.91	105.09	92.86	87.60	89.14	111.54	76.87	104.77		779.77
Zone 1 - Harrow Central										
Harrow town centre	30.77	21.86	3.44	17.70	11.94	13.38	4.92	10.90	0.05	114.96
Wealdstone district centre	6.27	0.00	0.00	0.00	0.00	0.00	2.15	0.00	1.05	9.47
Sub-total - Zone 1	37.04	21.86	3.44	17.70	11.94	13.38	7.07	10.90	1.10	124.43
Zone 2 - Harrow Southwest										
Raynes Lane district centre	0.34	11.24	1.86	0.00	0.00	0.00	1.84	1.78	2.05	19.11
South Harrow district centre	0.00	6.73	0.00	0.53	0.00	4.02	7.99	0.00	3.05	22.31
Other Zone 2	2.01	7.46	0.00	0.00	0.00	0.00	0.46	0.00	4.05	13.99
Sub-total - Zone 1	2.35	25.43	1.86	0.53	0.00	4.02	10.30	1.78	9.15	55.41
Zone 3 - Harrow Northwest										
Pinner district centre	8.84	4.20	31.57	0.53	2.94	2.34	0.00	7.96	2.05	60.44
North Harrow district centre	1.01	0.95	0.37	0.00	0.00	2.57	0.00	0.00	3.05	7.94
Hatch End	10.52	0.00	11.42	5.78	6.77	3.46	0.00	0.42	4.05	42.42
Sub-total - Zone 3	20.37	5.15	43.36	6.31	9.72	8.37	0.00	8.38	9.15	110.80
Zone 4 - Harrow Northeast										
Stanmore district centre	0.00	0.00	2.60	12.09	8.38	3.68	0.00	0.00	4.05	30.80
Harrow Weald	9.29	3.36	0.37	5.52	3.57	0.00	0.00	0.63	5.05	27.79
Other Zone 4	1.01	1.58	0.00	6.04	3.39	0.00	0.00	0.00	6.05	18.07
Sub-total - Zone 4	10.30	4.94	2.97	23.65	15.33	3.68	0.00	0.63	15.15	76.65
Zone 5 - Harrow Southeast										
Other Zone 5	1.68	0.74	0.00	3.42	9.54	7.47	0.00	0.00	4.05	26.89
Sub-total - Zone 5	1.68	0.74	0.00	3.42	9.54	7.47	0.00	0.00	4.05	26.89
LB Harrow total	71.73	58.11	51.63	51.60	46.53	36.92	17.37	21.69		394.18
Zone 6 Brent North	4.70	0.00	3.90	0.00	9.89	8.70	0.31	0.42	n/a	27.92
Zone 7 Ealing North	1.23	2.63	2.23	0.35	0.98	0.00	13.53	2.20	n/a	23.15
Zone 8 Hillingdon Northeast	1.23	5.46	4.27	0.00	0.00	0.00	2.54	21.79	n/a	35.30
Sub-total - Zones 6 to 8	7.16	8.09	10.40	0.35	10.87	8.70	16.37	24.41	4.05	507.44
Outside study area										
LB Barnet	0.67	0.00	2.04	5.69	4.19	4.13	1.38	2.41	n/a	20.52
LB Brent	0.00	4.41	2.51	0.96	0.71	12.38	8.46	0.00	n/a	29.43
LB Ealing	0.00	4.83	0.00	0.00	0.00	2.01	9.22	0.00	n/a	16.07
LB Hillingdon	1.23	11.03	9.47	0.00	3.57	0.67	7.23	27.14	n/a	60.33
Hertsmere	0.00	0.00	0.00	0.53	0.45	0.67	2.46	0.00	n/a	4.10
Watford	5.37	1.16	6.13	8.06	5.35	3.57	0.00	1.26	n/a	30.89
Central London	10.86	3.36	6.59	8.41	12.12	22.20	4.00	11.00	n/a	78.54
Other	14.88	14.08	4.09	12.00	5.35	20.30	10.38	16.87	n/a	97.95
Eslewhere Sub-Total	33.01	38.88	30.83	35.65	31.73	65.92	43.13	58.67	n/a	337.83
TOTAL	111.91	105.09	92.86	87.60	89.14	111.54	76.87	104.77		

Source: NEMS Household Survey August 2023 - with Lichfield's analysis

Table 6: Future 2026 food and beverage patterns (£M)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Expenditure 2026	124.67	108.06	94.49	88.85	90.61	114.39	77.65	107.30		806.02
Zone 1 - Harrow Central										
Harrow town centre	34.28	22.48	3.50	17.95	12.14	13.73	4.97	11.16	0.05	120.25
Wealdstone district centre	6.98	0.00	0.00	0.00	0.00	0.00	2.17	0.00	1.05	10.21
Sub-total - Zone 1	41.27	22.48	3.50	17.95	12.14	13.73	7.14	11.16	1.10	130.46
Zone 2 - Harrow Southwest										
Raynes Lane district centre	0.37	11.56	1.89	0.00	0.00	0.00	1.86	1.82	2.05	19.56
South Harrow district centre	0.00	6.92	0.00	0.53	0.00	4.12	8.08	0.00	3.05	22.69
Other Zone 2	2.24	7.67	0.00	0.00	0.00	0.00	0.47	0.00	4.05	14.43
Sub-total - Zone 1	2.62	26.15	1.89	0.53	0.00	4.12	10.40	1.82	9.15	56.69
Zone 3 - Harrow Northwest										
Pinner district centre	9.85	4.32	32.13	0.53	2.99	2.40	0.00	8.16	2.05	62.43
North Harrow district centre	1.12	0.97	0.38	0.00	0.00	2.63	0.00	0.00	3.05	8.15
Hatch End	11.72	0.00	11.62	5.86	6.89	3.55	0.00	0.43	4.05	44.12
Sub-total - Zone 3	22.69	5.29	44.13	6.40	9.88	8.58	0.00	8.58	9.15	114.70
Zone 4 - Harrow Northeast										
Stanmore district centre	0.00	0.00	2.65	12.26	8.52	3.77	0.00	0.00	4.05	31.25
Harrow Weald	10.35	3.46	0.38	5.60	3.62	0.00	0.00	0.64	5.05	29.10
Other Zone 4	1.12	1.62	0.00	6.13	3.44	0.00	0.00	0.00	6.05	18.37
Sub-total - Zone 4	11.47	5.08	3.02	23.99	15.58	3.77	0.00	0.64	15.15	78.71
Zone 5 - Harrow Southeast										
Other Zone 5	1.87	0.76	0.00	3.47	9.69	7.66	0.00	0.00	4.05	27.50
Sub-total - Zone 5	1.87	0.76	0.00	3.47	9.69	7.66	0.00	0.00	4.05	27.50
LB Harrow total	79.91	59.76	52.54	52.33	47.30	37.86	17.55	22.21		408.06
Zone 6 Brent North	5.24	0.00	3.97	0.00	10.06	8.92	0.31	0.43	n/a	28.92
Zone 7 Ealing North	1.37	2.70	2.27	0.36	1.00	0.00	13.67	2.25	n/a	23.61
Zone 8 Hillingdon Northeast	1.37	5.62	4.35	0.00	0.00	0.00	2.56	22.32	n/a	36.22
Sub-total - Zones 6 to 8	7.98	8.32	10.58	0.36	11.05	8.92	16.54	25.00	4.05	524.32
Outside study area										
LB Barnet	0.75	0.00	2.08	5.78	4.26	4.23	1.40	2.47	n/a	20.96
LB Brent	0.00	4.54	2.55	0.98	0.72	12.70	8.54	0.00	n/a	30.03
LB Ealing	0.00	4.97	0.00	0.00	0.00	2.06	9.32	0.00	n/a	16.35
LB Hillingdon	1.37	11.35	9.64	0.00	3.62	0.69	7.30	27.79	n/a	61.76
Hertsmere	0.00	0.00	0.00	0.53	0.45	0.69	2.48	0.00	n/a	4.16
Watford	5.98	1.19	6.24	8.17	5.44	3.66	0.00	1.29	n/a	31.97
Central London	12.09	3.46	6.71	8.53	12.32	22.76	4.04	11.27	n/a	81.18
Other	16.58	14.48	4.16	12.17	5.44	20.82	10.48	17.28	n/a	101.40
Eslewhere Sub-Total	36.78	39.98	31.37	36.16	32.26	67.61	43.56	60.09	n/a	347.80
TOTAL	124.67	108.06	94.49	88.85	90.61	114.39	77.65	107.30		

Source: NEMS Household Survey August 2023 - with Lichfield's analysis

Table 7: Future 2031 food and beverage patterns (£M)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Expenditure 2031	154.53	112.59	96.71	92.87	92.53	121.81	81.10	113.23		865.38
Zone 1 - Harrow Central										
Harrow town centre	42.50	23.42	3.58	18.76	12.40	14.62	5.19	11.78	0.05	132.29
Wealdstone district centre	8.65	0.00	0.00	0.00	0.00	0.00	2.27	0.00	1.05	11.97
Sub-total - Zone 1	51.15	23.42	3.58	18.76	12.40	14.62	7.46	11.78	1.10	144.26
Zone 2 - Harrow Southwest										
Raynes Lane district centre	0.46	12.05	1.93	0.00	0.00	0.00	1.95	1.92	2.05	20.37
South Harrow district centre	0.00	7.21	0.00	0.56	0.00	4.39	8.43	0.00	3.05	23.63
Other Zone 2	2.78	7.99	0.00	0.00	0.00	0.00	0.49	0.00	4.05	15.31
Sub-total - Zone 1	3.25	27.25	1.93	0.56	0.00	4.39	10.87	1.92	9.15	59.31
Zone 3 - Harrow Northwest										
Pinner district centre	12.21	4.50	32.88	0.56	3.05	2.56	0.00	8.61	2.05	66.42
North Harrow district centre	1.39	1.01	0.39	0.00	0.00	2.80	0.00	0.00	3.05	8.64
Hatch End	14.53	0.00	11.90	6.13	7.03	3.78	0.00	0.45	4.05	47.86
Sub-total - Zone 3	28.12	5.52	45.17	6.69	10.09	9.14	0.00	9.06	9.15	122.92
Zone 4 - Harrow Northeast										
Stanmore district centre	0.00	0.00	2.71	12.82	8.70	4.02	0.00	0.00	4.05	32.29
Harrow Weald	12.83	3.60	0.39	5.85	3.70	0.00	0.00	0.68	5.05	32.10
Other Zone 4	1.39	1.69	0.00	6.41	3.52	0.00	0.00	0.00	6.05	19.05
Sub-total - Zone 4	14.22	5.29	3.09	25.08	15.91	4.02	0.00	0.68	15.15	83.44
Zone 5 - Harrow Southeast										
Other Zone 5	2.32	0.79	0.00	3.62	9.90	8.16	0.00	0.00	4.05	28.84
Sub-total - Zone 5	2.32	0.79	0.00	3.62	9.90	8.16	0.00	0.00	4.05	28.84
LB Harrow total	99.05	62.26	53.77	54.70	48.30	40.32	18.33	23.44		438.78
Zone 6 Brent North	6.49	0.00	4.06	0.00	10.27	9.50	0.32	0.45	n/a	31.10
Zone 7 Ealing North	1.70	2.81	2.32	0.37	1.02	0.00	14.27	2.38	n/a	24.88
Zone 8 Hillingdon Northeast	1.70	5.85	4.45	0.00	0.00	0.00	2.68	23.55	n/a	38.23
Sub-total - Zones 6 to 8	9.89	8.67	10.83	0.37	11.29	9.50	17.27	26.38	4.05	561.83
Outside study area										
LB Barnet	0.93	0.00	2.13	6.04	4.35	4.51	1.46	2.60	n/a	22.01
LB Brent	0.00	4.73	2.61	1.02	0.74	13.52	8.92	0.00	n/a	31.54
LB Ealing	0.00	5.18	0.00	0.00	0.00	2.19	9.73	0.00	n/a	17.10
LB Hillingdon	1.70	11.82	9.86	0.00	3.70	0.73	7.62	29.33	n/a	64.77
Hertsmere	0.00	0.00	0.00	0.56	0.46	0.73	2.60	0.00	n/a	4.35
Watford	7.42	1.24	6.38	8.54	5.55	3.90	0.00	1.36	n/a	34.39
Central London	14.99	3.60	6.87	8.92	12.58	24.24	4.22	11.89	n/a	87.31
Other	20.55	15.09	4.26	12.72	5.55	22.17	10.95	18.23	n/a	109.52
Eslewhere Sub-Total	45.59	41.66	32.11	37.80	32.94	71.99	45.50	63.41	n/a	370.99
TOTAL	154.53	112.59	96.71	92.87	92.53	121.81	81.10	113.23		

Source: NEMS Household Survey August 2023 - with Lichfield's analysis

Table 8: Future 2036 food and beverage patterns (£M)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Expenditure 2036	167.11	118.60	101.80	98.08	97.49	129.64	84.91	118.71		916.33
Zone 1 - Harrow Central										
Harrow town centre	45.96	24.67	3.77	19.81	13.06	15.56	5.43	12.35	0.05	140.65
Wealdstone district centre	9.36	0.00	0.00	0.00	0.00	0.00	2.38	0.00	1.05	12.79
Sub-total - Zone 1	55.31	24.67	3.77	19.81	13.06	15.56	7.81	12.35	1.10	153.44
Zone 2 - Harrow Southwest										
Raynes Lane district centre	0.50	12.69	2.04	0.00	0.00	0.00	2.04	2.02	2.05	21.33
South Harrow district centre	0.00	7.59	0.00	0.59	0.00	4.67	8.83	0.00	3.05	24.73
Other Zone 2	3.01	8.42	0.00	0.00	0.00	0.00	0.51	0.00	4.05	15.99
Sub-total - Zone 1	3.51	28.70	2.04	0.59	0.00	4.67	11.38	2.02	9.15	62.05
Zone 3 - Harrow Northwest										
Pinner district centre	13.20	4.74	34.61	0.59	3.22	2.72	0.00	9.02	2.05	70.16
North Harrow district centre	1.50	1.07	0.41	0.00	0.00	2.98	0.00	0.00	3.05	9.01
Hatch End	15.71	0.00	12.52	6.47	7.41	4.02	0.00	0.47	4.05	50.66
Sub-total - Zone 3	30.41	5.81	47.54	7.06	10.63	9.72	0.00	9.50	9.15	129.82
Zone 4 - Harrow Northeast										
Stanmore district centre	0.00	0.00	2.85	13.53	9.16	4.28	0.00	0.00	4.05	33.88
Harrow Weald	13.87	3.80	0.41	6.18	3.90	0.00	0.00	0.71	5.05	33.91
Other Zone 4	1.50	1.78	0.00	6.77	3.70	0.00	0.00	0.00	6.05	19.80
Sub-total - Zone 4	15.37	5.57	3.26	26.48	16.77	4.28	0.00	0.71	15.15	87.60
Zone 5 - Harrow Southeast										
Other Zone 5	2.51	0.83	0.00	3.83	10.43	8.69	0.00	0.00	4.05	30.33
Sub-total - Zone 5	2.51	0.83	0.00	3.83	10.43	8.69	0.00	0.00	4.05	30.33
LB Harrow total	107.12	65.59	56.60	57.77	50.89	42.91	19.19	24.57		463.24
Zone 6 Brent North	7.02	0.00	4.28	0.00	10.82	10.11	0.34	0.47	n/a	33.04
Zone 7 Ealing North	1.84	2.97	2.44	0.39	1.07	0.00	14.94	2.49	n/a	26.15
Zone 8 Hillingdon Northeast	1.84	6.17	4.68	0.00	0.00	0.00	2.80	24.69	n/a	40.18
Sub-total - Zones 6 to 8	10.70	9.13	11.40	0.39	11.89	10.11	18.09	27.66	4.05	592.94
Outside study area										
LB Barnet	1.00	0.00	2.24	6.38	4.58	4.80	1.53	2.73	n/a	23.25
LB Brent	0.00	4.98	2.75	1.08	0.78	14.39	9.34	0.00	n/a	33.32
LB Ealing	0.00	5.46	0.00	0.00	0.00	2.33	10.19	0.00	n/a	17.98
LB Hillingdon	1.84	12.45	10.38	0.00	3.90	0.78	7.98	30.74	n/a	68.08
Hertsmere	0.00	0.00	0.00	0.59	0.49	0.78	2.72	0.00	n/a	4.57
Watford	8.02	1.30	6.72	9.02	5.85	4.15	0.00	1.42	n/a	36.49
Central London	16.21	3.80	7.23	9.42	13.26	25.80	4.42	12.46	n/a	92.58
Other	22.23	15.89	4.48	13.44	5.85	23.59	11.46	19.11	n/a	116.05
Eslewhere Sub-Total	49.30	43.88	33.80	39.92	34.71	76.61	47.63	66.47	n/a	392.33
TOTAL	167.11	118.60	101.80	98.08	97.49	129.64	84.91	118.71		

Source: NEMS Household Survey August 2023 - with Lichfield's analysis

Table 9: Future 2041 food and beverage patterns (£M)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Expenditure 2041	178.14	126.78	108.70	104.38	104.25	137.58	89.26	124.34		973.43
Zone 1 - Harrow Central										
Harrow town centre	48.99	26.37	4.02	21.08	13.97	16.51	5.71	12.93	0.05	149.64
Wealdstone district centre	9.98	0.00	0.00	0.00	0.00	0.00	2.50	0.00	1.05	13.53
Sub-total - Zone 1	58.96	26.37	4.02	21.08	13.97	16.51	8.21	12.93	1.10	163.16
Zone 2 - Harrow Southwest										
Raynes Lane district centre	0.53	13.57	2.17	0.00	0.00	0.00	2.14	2.11	2.05	22.58
South Harrow district centre	0.00	8.11	0.00	0.63	0.00	4.95	9.28	0.00	3.05	26.03
Other Zone 2	3.21	9.00	0.00	0.00	0.00	0.00	0.54	0.00	4.05	16.79
Sub-total - Zone 1	3.74	30.68	2.17	0.63	0.00	4.95	11.96	2.11	9.15	65.40
Zone 3 - Harrow Northwest										
Pinner district centre	14.07	5.07	36.96	0.63	3.44	2.89	0.00	9.45	2.05	74.56
North Harrow district centre	1.60	1.14	0.43	0.00	0.00	3.16	0.00	0.00	3.05	9.39
Hatch End	16.75	0.00	13.37	6.89	7.92	4.26	0.00	0.50	4.05	53.74
Sub-total - Zone 3	32.42	6.21	50.76	7.52	11.36	10.32	0.00	9.95	9.15	137.69
Zone 4 - Harrow Northeast										
Stanmore district centre	0.00	0.00	3.04	14.40	9.80	4.54	0.00	0.00	4.05	35.84
Harrow Weald	14.79	4.06	0.43	6.58	4.17	0.00	0.00	0.75	5.05	35.82
Other Zone 4	1.60	1.90	0.00	7.20	3.96	0.00	0.00	0.00	6.05	20.72
Sub-total - Zone 4	16.39	5.96	3.48	28.18	17.93	4.54	0.00	0.75	15.15	92.37
Zone 5 - Harrow Southeast										
Other Zone 5	2.67	0.89	0.00	4.07	11.15	9.22	0.00	0.00	4.05	32.05
Sub-total - Zone 5	2.67	0.89	0.00	4.07	11.15	9.22	0.00	0.00	4.05	32.05
LB Harrow total	114.19	70.11	60.43	61.48	54.42	45.54	20.17	25.74		490.68
Zone 6 Brent North	7.48	0.00	4.57	0.00	11.57	10.73	0.36	0.50	n/a	35.20
Zone 7 Ealing North	1.96	3.17	2.61	0.42	1.15	0.00	15.71	2.61	n/a	27.62
Zone 8 Hillingdon Northeast	1.96	6.59	5.00	0.00	0.00	0.00	2.95	25.86	n/a	42.36
Sub-total - Zones 6 to 8	11.40	9.76	12.17	0.42	12.72	10.73	19.01	28.97	4.05	627.92
Outside study area										
LB Barnet	1.07	0.00	2.39	6.78	4.90	5.09	1.61	2.86	n/a	24.70
LB Brent	0.00	5.32	2.93	1.15	0.83	15.27	9.82	0.00	n/a	35.33
LB Ealing	0.00	5.83	0.00	0.00	0.00	2.48	10.71	0.00	n/a	19.02
LB Hillingdon	1.96	13.31	11.09	0.00	4.17	0.83	8.39	32.20	n/a	71.95
Hertsmere	0.00	0.00	0.00	0.63	0.52	0.83	2.86	0.00	n/a	4.83
Watford	8.55	1.39	7.17	9.60	6.25	4.40	0.00	1.49	n/a	38.87
Central London	17.28	4.06	7.72	10.02	14.18	27.38	4.64	13.06	n/a	98.33
Other	23.69	16.99	4.78	14.30	6.25	25.04	12.05	20.02	n/a	123.13
Eslewhere Sub-Total	52.55	46.91	36.09	42.48	37.11	81.31	50.08	69.63	n/a	416.16
TOTAL	178.14	126.78	108.70	104.38	104.25	137.58	89.26	124.34		

Source: NEMS Household Survey August 2023 - with Lichfield's analysis

Table 10: Food and beverage floorspace

Zone	Gross floorspace (sq.m)
1 - Harrow Central	
Harrow MC	11,981
Wealdstone DC	2,228
Other Zone 1 - out of centre	2,269
	16,478
2 - Harrow Southwest	
Rayners Lane DC	2,792
South Harrow DC	1,593
Sudbury Hill LC	699
Other Zone 2 - out of centre	5,100
	10,184
3 - Harrow Northwest	
Hatch End LC	3,888
North Harrow DC	2,732
Pinner DC	4,007
Other Zone 3 - out of centre	1,469
	12,096
4 - Harrow Northeast	
Belmont LC	1,441
Harrow Weald LC	1,405
Stanmore DC	1,994
Other Zone 4 - out of centre	1,537
	6,377
5 - Harrow Southeast	
Burnt Oak DC	993
Edgware DC	1,857
Kenton DC	1,052
Kingsbury DC	511
Queensbury LC	1,324
Other Zone 5 - out of centre	4,314
	10,051
	55,186

Source: LB Harrow land use survey July 2023

Table 11: Summary of food and beverage expenditure 2023 to 2041 (£M)

	2023	2026	2031	2036	2041
Available expenditure in LB Harrow					
Zone 1 Harrow Central	124.43	130.46	144.26	153.44	163.16
Zone 2 Harrow Southwest	55.41	56.69	59.31	62.05	65.40
Zone 3 Harrow Northwest	110.80	114.70	122.92	129.82	137.69
Zone 4 Harrow Northeast	76.65	78.71	83.44	87.60	92.37
Zone 5 Harrow Southeast	26.89	27.50	28.84	30.33	32.05
Total	394.18	408.06	438.78	463.24	490.68
Benchmark turnover of existing facilities					
Zone 1 Harrow Central	124.43	124.55	126.55	127.82	129.11
Zone 2 Harrow Southwest	55.41	55.46	56.36	56.92	57.49
Zone 3 Harrow Northwest	110.80	110.91	112.69	113.82	114.97
Zone 4 Harrow Northeast	76.65	76.72	77.96	78.74	79.53
Zone 5 Harrow Southeast	26.89	26.92	27.35	27.62	27.90
Total	394.18	394.56	400.91	404.94	409.00
Surplus/Deficit Expenditure (£m)					
Zone 1 Harrow Central	0.00	5.91	17.71	25.61	34.06
Zone 2 Harrow Southwest	0.00	1.22	2.95	5.13	7.91
Zone 3 Harrow Northwest	0.00	3.79	10.23	16.00	22.72
Zone 4 Harrow Northeast	0.00	1.99	5.48	8.85	12.84
Zone 5 Harrow Southeast	0.00	0.58	1.49	2.70	4.15
Total	0.00	13.50	37.86	58.30	81.68

Source: Tables 5 to 10

Table 12: Food and beverage floorspace capacity 2023 to 2041

	2023	2026	2031	2036	2041
Turnover density new floorspace (£ per sq.m)	£6,000	6,006	6,102	6,164	6,226
Floorspace capacity (sq.m gross)					
Zone 1 Harrow Central	0	984	2,902	4,156	5,470
Zone 2 Harrow Southwest	0	204	484	832	1,270
Zone 3 Harrow Northwest	0	631	1,676	2,596	3,650
Zone 4 Harrow Northeast	0	332	899	1,437	2,063
Zone 5 Harrow Southeast	0	97	244	439	667
Total	0	2,248	6,205	9,458	13,119

Birmingham

0121 713 1530

birmingham@lichfields.uk

Edinburgh

0131 285 0670

edinburgh@lichfields.uk

Manchester

0161 837 6130

manchester@lichfields.uk

Bristol

0117 403 1980

bristol@lichfields.uk

Leeds

0113 397 1397

leeds@lichfields.uk

Newcastle

0191 261 5685

newcastle@lichfields.uk

Cardiff

029 2043 5880

cardiff@lichfields.uk

London

020 7837 4477

london@lichfields.uk

Thames Valley

0118 334 1920

thamesvalley@lichfields.uk



@LichfieldsUK

lichfields.uk