London Borough of Brent

BRENT RETAIL NEED & CAPACITY STUDY

ROGER TYM & PARTNERS
Planners and Development Economists

Executive Summary
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1 INTRODUCTION

Introduction

1.1 In June 2005 the London Borough of Brent (LB Brent) commissioned Roger Tym & Partners (RTP) to carry out a borough-wide retail need and capacity study. The study provides background information for the emerging Local Development Framework and informs town centre enhancement and management strategies for Wembley, Harlesden and Willesden Green.

1.2 In addition to the above, the study will enable LB Brent to respond to the emerging West London Sub-Regional Development Framework. The draft framework of June 2005 makes a number of estimates about the retail capacity of the borough and the future role of the centres in its retail hierarchy. This study assesses those estimates.

1.3 LB Brent already has a wide range of recent and relatively retail survey data, including:

- A borough-wide Household Shopping Survey (2003) – undertaken by LB Brent;
- A Town Centre Healthcheck Report (2003) of all the main and district centres in the borough – undertaken by LB Brent;
- A Shoppers Survey (2005) of Wembley, Harlesden and Willesden Green – undertaken by Adsearch Ltd; and
- A Wembley Retail Capacity Study (2001) - undertaken by Driver Jonas;

1.4 In addition, retail assessments have been prepared in support of planning applications in and around Wembley town centre and for development at Wembley Stadium.

1.5 On this basis, we reassessed the main conclusions drawn from each survey and, where available, we supplemented the data collected by LB Brent with additional retail information. In addition, we reinterpreted the existing retail data to provide a framework to guide retail development over the next decade. In particular, the study reconsiders the capacity of Wembley town centre following retail planning approvals and suggests a re-assessment of its strategy.

The Study Aims

1.6 LB Brent's study brief comprises two aims:

i) To identify the demand and capacity in terms of quality, quantity, type, and sites for additional retail development for convenience and comparison goods within the borough generally; and

ii) To re-assess in particular, the retail capacity of, and strategy for, Wembley town centre in the light of the retail and leisure floorspace permitted within Wembley Stadium precinct, other developments in the locality, and key mixed-use opportunity sites within the town centre.

1.7 There are five main objectives of the study:

i) To undertake a qualitative analysis of the existing structure and hierarchy of town centres within Brent, with a particular focus on new Wembley – **using data from shoppers survey and healthcheck report.**

ii) To establish the current and potential catchment areas of the major and main district town centres – **using data from household survey.**

iii) To undertake a qualitative and quantitative assessment of the need for comparison and convenience retail facilities within the borough up to 2010 and 2015, taking into account the major retail and leisure proposals within LB Brent and in neighbouring boroughs – **interpreting data from household survey.**

iv) Where the retail need exists, to identify potential development sites and assess their suitability for retail / mixed use development – **using data from shoppers survey, household survey and healthcheck report.**

v) To provide a robust framework for retail development within the borough over the next 10 years, to help consolidate and enhance the position of the centres, particularly Wembley, within the retail hierarchy. The framework will enable LB Brent to prepare policies for the borough's emerging Local Development Framework – **using overall study findings.**

1.8 This executive summary seeks to draw out all the key messages and recommendations of the study.

2 POLICY CONTEXT

National Guidance

2.1 The national policy context in so far as it relates to town centres and the location of new retail and leisure developments is set, in the main, by PPS 1, PPS 6, PPG 13, the Transport White Paper, and the White Paper "A *better quality of life - a strategy for sustainable development for the United Kingdom*".

2.2 PPS6 confirms the preference for town centre locations for all types of new development which generate many trips. Edge-of-centre and out-of-centre retail and leisure developments represent, respectively, the less favoured and last resort options; such retail and leisure developments can only be justified by exceptional circumstances where they pass each of the six key national policy tests, as follows:

- the 'need' test;
- the sequential approach;
- the likely impact on the development plan's strategy;
- the likely impact on the vitality and viability of existing centres;
- accessibility by a choice of means of transport, including the by foot and bicycle modes; and
- the likely effect on travel and car use.

2.1 National guidance makes it clear that all proposals for town centre type uses should be directed towards town centres. This national policy approach will form the basis for the suggested borough-wide retail strategy.

2.2 PPS6 sets out the key indicators which local authorities should collect information on in order to measure the vitality and viability and monitor the health of their centres. These are as follows: diversity of uses; amount of floorspace in edge-of-centre and out-of-centre locations; potential capacity; retailer representation; shopping rents; proportion of vacant property; commercial yields; pedestrian flows; accessibility; customer and residents views; crime and safety; and environmental quality. LB Brent collects most of this information as part of their shoppers, healthcheck and household surveys. This study will interpret data from the household survey to identify potential capacity in the borough.

London Plan

2.3 The London Plan (February 2004) reiterates the aims and objectives of national planning guidance for town centres and retailing, particularly in terms of sustaining and enhancing the vitality and viability of town centres throughout London by making them the main focus for new retail development.

2.4 The London Plan identifies a retail hierarchy for London's town centres, and confirms that future capacity for new retail and leisure development should be identified through town centre healthchecks and through an assessment of retail needs.

2.5 Wembley and Kilburn are identified as Major Centres in the London Plan because they provide a mix of comparison and convenience goods retailing, normally in excess of 50,000 sqm, and provide leisure and entertainment functions. Brent Cross is identified as a Regional Shopping Centre, but not a town centre. The Plan identifies eleven district centres within LB Brent - Cricklewood, Colindale, Burnt Oak, Harlesden, Willesden Green, Wembley Park, Preston Road, Neasden, Ealing Road, Kingsbury and Kenton. These centres provide the main convenience goods and service provision for more local communities. In **Section 9**, we have suggested some changes to the current defined retail hierarchy in the adopted Brent UDP.

2.6 The London Plan also identifies Opportunity Areas within different parts of London, on the basis that they are capable of accommodating substantial numbers of new jobs or homes, and associated development. The Opportunity Areas relevant to this study are:

- Wembley - for leisure related development
- White City - for significant new retail provision
- Cricklewood / Brent Cross - for redevelopment as a town centre

2.7 Any major development within these opportunity areas will have an impact upon the existing protected town centres in LB Brent, and on new retail development and regeneration efforts within them. Clearly, retail developments at White City and Brent Cross should not compromise efforts to strengthen Wembley's role as a Major Centre.

Draft West London Sub-Regional Development Framework

2.8 The draft West London Sub-Regional Development Framework (SRDF) provides non-statutory guidance on the implementation of London Plan policies in the light of circumstances in West London. The various actions and questions contained in the draft SRDF are derived directly from London Plan policies.

2.9 LB Brent is within the West London sub-region, along with Hammersmith & Fulham, Ealing, Harrow, Hillingdon and Hounslow. The draft SRDF made a number of comments of relevance to this study, which are summarised below.

2.10 The draft SRDF estimated requirements for additional retail floorspace for the borough are:

- additional requirement of 18,000 to 26,000sqm gross comparison goods floorspace between 2001-2016
- additional requirement of 1,000 to 7,000sqm gross convenience goods floorspace between 2001-2016

2.11 The draft SRDF proposes a strategy for some of the LB Brent centres, which is as follows:

- Wembley - regeneration proposals should strengthen its role as an integrated town centre - need for 5,000sqm addition comparison goods floorspace
- Kilburn - comprehensive approach to regeneration required by strategic and local stakeholders in Camden, Brent, Barnet and Westminster.
- Cricklewood - healthcheck indicates that this centre may already be functioning as a Major Centre.

2.12 This study will reassess the floorspace estimates and proposed strategy contained in the draft SRDF.

LB Brent Unitary Development Plan

2.13 The strategic policies in the adopted UDP (January 2004) reflect national and regional planning guidance. They seek to sustain and enhance the function of the town centres, promoting their vitality and viability and encouraging the provision of a wide range of goods and services that are well located and accessible.

2.14 The current retail hierarchy is broadly in accordance with the London Plan network of town centres, with the exception of Kensal Rise, Queens Park and Sudbury.

2.15 The UDP has specific policies for certain town centres. These are as follows:

- The regeneration of Wembley by:

- allowing the eastwards expansion of the existing centre towards the Stadium;
- directing large scale leisure entertainment and retail uses to the National Stadium Policy Area;
- a comprehensive programme of environmental improvements; and
- identifying development opportunity sites.

- For Kilburn town centre, the Council will develop and implement a programme to achieve economic regeneration and environmental improvement.
- Ealing Road town centre will not be allowed to expand beyond its current defined boundaries.
- The Council will work with local residents and businesses to regenerate and improve the local environment in Harlesden.
- The regeneration of Kensal Rise district centre will be promoted and action to diversify the range of uses will be supported.

2.16 As with other centres across London, the LB Brent centres will not operate in isolation, but will be influenced by neighbouring retail locations. The LB Brent centres will be affected in particular by current and future development at Brent Cross, as a regional shopping centre. Harrow and Ealing are neighbouring Metropolitan centres, which will continue to attract some of the retail expenditure of Brent's residents. White City is being developed into a major retail destination, which will attract residents from the south of the borough. Finally, the West End, as the principal shopping destination for London, will always attract Brent shoppers.

2.17 Basically all these centres will compete with Wembley for shoppers and for national retailers. Major retailers are only likely to seek to occupy larger units, within prime retail locations, where the footfall is high and other major retailers are located. There is thus an over-arching need to be realistic about what can be expected from LB Brent centres and the proportion of the borough's expenditure which these centres can actually retain.

3 EXISTING SURVEY BASE

Introduction

3.1 This section provides details of the existing LB Brent retail survey base - contained in the household, shoppers', and healthcheck surveys - and provides a factual commentary on the adequacy of the surveys for this borough-wide retail study. Where relevant, we identify the limitations of the surveys and set out how we have used existing data and added new data or assumptions.

Household Survey 2003

3.2 Our need assessment has been based partly on the LB Brent household survey 2003. In summary, the survey obtained information on the following:

- Customer views and behaviour;
- Main food, day-to-day food, and non-food shopping trips;
- Households shopping patterns;
- Mode of transport used for shopping trips;
- Spending patterns;
- Frequency of shopping trips;
- Suggested improvements to centres; and
- A demographic profile of shoppers.

3.3 A total of 584 valid survey responses were obtained. This provides an adequate base for assessing the shopping patterns in LB Brent, and will enable the capacity for additional comparison and convenience goods provision to be calculated.

3.4 However, like all market survey exercises, this survey has certain drawbacks concerning its methodology. The main drawbacks of the LB Brent household survey are as follows:

- The survey was based on postal respondents;
- The survey was restricted to the LB Brent boundary only;
- The survey was not split into survey zones;
- Questions on convenience shopping identified only out-of-centre stores;
- Questions on comparison shopping did not split the type of goods into recognized categories.

3.5 This study incorporates a series of assumptions in order to overcome these difficulties and to improve the robustness of the raw data. In summary, the key stages undertaken to manipulate the data were as follows:

- We divided the household data into zones based on postcode sectors in order to reflect the differences in expenditure of different parts of the borough.
- Where answers were unclear (due to inputting inconsistencies for example), we manually sorted to data in order to ensure as many of the responses as possible could be included within the analysis.
- We used the centres and stores as included within the survey and assigned the responses to each centre or store. For comparison goods and where a retail park was included, we used the whole retail park rather than the individual store in order to calculate an overall market share.

- Once we established market shares, we applied a system of weighting so that the market shares were reflective of households real expenditure patterns.

Shoppers Survey 2005

3.6 In 2005, LB Brent instructed Adsearch Limited to undertake a shoppers' survey of Wembley, Harlesden, and Willesden Green town centres. The purpose of the survey was to provide information on the shopping habits, shopper demographics and shopper opinions in the three centres.

3.7 The survey was based on a structured questionnaire that asked a series of unprompted questions aimed at drawing out information on visitor habits and attitudes in each specific centre. The questionnaire asked a fairly standard series of questions one would expect to find in a shoppers' survey. In summary, the survey obtained information on the following:

- Visitor demographics;
- Trip characteristics;
- Visitor spending;
- Mode of transport;
- Visitor attitudes; and
- Suggested improvements

3.8 A total of 1,132 surveys were undertaken, with 509 conducted in Wembley, 308 in Harlesden, and 315 in Willesden Green. This sample size for each centre is high, providing a comprehensive set of results and a robust evidence base for the borough's emerging LDF and town centre strategies.

Healthcheck Survey 2003 and 2005

3.9 LB Brent regularly monitors the health of all its defined town centres, as advised in PPS6. Healthcheck surveys are carried out by LB Brent every two years, where information is gathered on most of the key indicators set out in PPS6.

3.10 The last full survey was undertaken in 2003, with some information updated in 2005. The healthcheck survey includes the following:

- recording the schedule of uses within each defined centre;
- pedestrian counts; and
- an assessment of centres environmental quality.

3.11 The above survey information has been supplemented by the following data:

- retail rents from Colliers CRE;
- retail yield data from Valuation Office Agency;
- information on retailer requirements from FOCUS; and
- gross floorspace for each unit based on OS digital mapping data.

3.12 In the next three sections we identify the key findings from the shoppers' and healthcheck surveys and provide an overview of the vitality, viability and future prospects for each of the main centres in the borough. The retail need and capacity of Brent's centres, together with draft retail policies are dealt with in later sections of this summary.

4 WEMBLEY

Overview

4.1 Wembley is identified as a Major Centre in the London Plan. Alongside Kilburn, which straddles the LB Brent and LB Camden borough boundary, Wembley is one of the primary town centres in LB Brent. It is the third largest of Brent's town centres, smaller than both Kilburn and Cricklewood. The floorspace survey indicates that Wembley provides approximately 54,000sqm gross of floorspace, of which 40,300sqm (75%) is currently used for retailing[1] purposes.

4.2 These totals, however, are slightly misleading as a large proportion of Central Square is currently vacant and awaiting redevelopment. As such in the near future Wembley town centre will have approximately 10,000sqm of additional retail floorspace, taking the amount of floorspace in retail use to over 50,000sqm - above Cricklewood, but still smaller than Kilburn. Furthermore, the Quintain and London Development Agency proposals will add to the retail attractions in Wembley town centre and its immediate surroundings.

4.3 Wembley is also the administrative and civic centre of Brent, containing a number of offices associated with the Council's functions. However, Wembley lacks other town centre uses one would expect to find in a major centre e.g. library, cinema, and other commercial leisure facilities.

4.4 Management Horizons Europe compiles an index of the rank of shopping centres in the UK. The latest data is for 2003-04. The data clearly demonstrates that Wembley is a declining centre, which has been falling down the UK shopping centre index ranking, and has been for some time. In 2003-04 Wembley is ranked in 491st place in the UK shopping index, which represents a fall of more than 200 places from its position in 1995-96 (279). The strategy for Wembley is summarised in **Section 9.**

Summary of Survey Findings

4.5 The key findings from the shoppers' and healthcheck surveys of Wembley are:

- Wembley is the main shopping destination in LB Brent;
- Few visits are made to the centre for eating and drinking uses[2];
- A relatively low proportion of shoppers do their main food shopping in the centre;
- The centre is only "average" at fulfilling the needs of its visitors for most shops and services, and for entertainment and leisure facilities it scores poorly;
- A high proportion of visitors never visit Wembley for its cafes, bars, or restaurants;
- A better environment was the main improvement suggested by visitors, although the redevelopment of Central Square will deliver significant improvements to the shopping environment in the near future;
- Wembley achieves prime Zone A retail rents of £650/sqm, which is below the level for Kilburn (£1,025/sqm), and substantially lower than other Major Centres in West London;
- Commercial retail yields in Wembley have improved considerably in the last decade, from 10% in 1995 to 6.75% in 2005, which represents the largest fall in retail yields of the comparable West London centre, and demonstrates increasing investor confidence in the centre as a result of planned improvements;

[1] Retail classes A1, A2, A3, A4 and A5
[2] Eating and drinking uses comprise A3 (restaurants and cafes), A4 (drinking establishments), and A5 (hot food takeaway)

- There are 28 national multiples, listed on the FOCUS database, with space requirements in Wembley - most are comparison goods retailers;
- Wembley currently only contains 6 out of 27 key attractors defined by GOAD - Argos, Boots, Dixons, Superdrug, Wilkinsons, and Woolworths. Furthermore in recent years some have left the centre - BhS and WH Smith, and most recently M&S. This fact clearly demonstrates the decline of Wembley town centre;
- There is currently almost 6,000sqm of vacant retail floorspace in the centre, although this largely as a result of redevelopment proposals for Central Square;
- Wembley is very accessible by public transport, with nine bus routes passing through the centre, and three underground stations within close proximity of the centre;
- There is a huge perception of crime. Therefore, reducing crime, and the perception of crime, in Wembley is an issue that must be tackled if the centre is to be attractive to shoppers and national multiple retailers and to allow the centre to improve; and
- In addition to the action already taking place, it is clear that Wembley requires a comprehensive programme of environmental improvements to provide more seating and trees.

5 KILBURN, HARLESDEN & WILLESDEN GREEN

Introduction

5.1 We now provide an overview of the vitality, viability and future prospects of Kilburn, as the other Major Centre in the borough, and Harlesden and Willesden Green, as district centres where town centre strategies will be prepared. These assessments are based upon the findings from the healthcheck survey for all centres, and the shoppers' survey for Harlesden and Willesden Green.

Kilburn

Overview

5.2 Kilburn is identified as a Major Centre in the London Plan. It is the largest of Brent's town centres, although approximately half of the centre's floorspace is outside the borough boundary in LB Camden. The floorspace survey indicates that Kilburn provides approximately 84,000sqm gross of floorspace in total. Over 55,000sqm of the total floorspace is currently used for retailing purposes, which equates to 66% of the floorspace.

5.3 The centre can be divided into three distinct zones by their characteristics: the southern section for national multiple retailers; the northern section for entertainment and leisure plus restaurants, cafes and bars; the middle section for secondary and independent retailers.

5.4 Kilburn is characterised by having a strong evening economy, with a number of bars and restaurants, and also the Tricycle theatre and cinema. The centre also contains some leisure uses including a bingo hall and gym. All these uses add to the overall attraction of Kilburn.

Summary of Survey Findings

5.5 A healthcheck survey of Kilburn was undertaken as part of LB Camden's retail study in 2003/04. Where appropriate we have utilised the findings from this survey to support the healthcheck assessment carried out by LB Brent.

5.6 The key findings from the healthcheck surveys of Kilburn are:

- Kilburn achieves prime Zone A retail rents of £1025/sqm, which is higher than Wembley but still lower than other centres in the West London sub-region.
- Kilburn's retail rental levels will be lower largely because it is a less attractive centre, and is located between competing shopping destinations i.e. Brent Cross to the north west and Central London to the south east.
- Yields have improved between 1995 and 2005, from 10% to 7.5%, but not as much as those in Wembley. Redevelopment and refurbishment opportunities do exist in the centre, which should lead to major improvements in the future.
- The FOCUS database indicates that there are 23 national multiples seeking space in Kilburn, which is slightly less than Wembley. Similar to Wembley, the majority of retailers seeking space in Kilburn are comparison goods retailers. It is generally the case that national multiple retailers will seek to locate in the primary shopping area close to other major retailers - for Kilburn this is the southern section centre.
- Kilburn is characterised by the large number of bars, restaurants and cafes in the centre. In contrast to Wembley, Kilburn also contains commercial leisure uses - Tricycle theatre and cinema, Mecca Bingo, and a Living Well gym.
- 7% of the floorspace in Kilburn is vacant, which is quite high. However, analysis of healthcheck survey data indicates that vacancy rates in Kilburn have been falling

for a number of years. Furthermore, the majority of vacant units are located outside the primary shopping areas, and as such are unlikely to be attractive to multiple retailers.

- Kilburn, like other Brent centres is very accessible by public transport - numerous bus routes pass through the centre, and four rail stations are located within it.
- Crime prevention schemes have been implemented in Kilburn, and there is CCTV cameras in operation. However, surveys clearly indicate that there are still concerns about safety in Kilburn, in particular in the evening. Tackling these outstanding issues will be necessary if the centre is to attract more visitors throughout the day.
- There have been some environmental and streetscape improvement schemes in Kilburn. However, overall the centre remains an unattractive shopping environment, and would benefit from more comprehensive improvements to provide more trees and street furniture.

Harlesden

Overview

5.7 Harlesden is defined as a District centre in the London Plan and a Main District centre in the adopted UDP. In terms of the amount of floorspace, Harlesden is one of the larger centres in LB Brent. The floorspace survey indicates that Harlesden contains over 50,000sqm of floorspace, of which almost 38,000sqm (76%) is in retail use.

5.8 Harlesden town centre is characterised by the high proportion of local convenience (butchers and greengrocers) and service uses (hairdressers), some of which serve the local Afro-Caribbean community. In general, the centre lacks national multiple retailers.

5.9 A key issue for Harlesden is the need to improve the shopping and built environment. The centre is located within a Conservation Area, and contains some attractive buildings. However, these qualities are overshadowed by poorly designed shopfronts and signage and a general lack of regard to good urban design. The setting of Harlesden's attractive and visually prominent buildings should be enhanced.

Summary of Survey Findings

5.10 The key findings from the shoppers' and healthcheck surveys of Harlesden are:

- A high proportion of shoppers tend to visit Harlesden for main food shopping, and shoppers' consider that the centre is "good" at fulfilling their needs for grocery shopping. This indicates that Budgens and the small local convenience stores in Harlesden meet the needs of its visitors.
- Harlesden does not contain a large supermarket, and the main foodstore for Harlesden shoppers' is Asda at Park Royal, which is located outside the borough.
- A lower proportion of Harlesden's visitors do their main non-food shopping in the centre, which demonstrates that Harlesden lacks comparison goods retailers. 17% of Harlesden visitors use Asda as the main destination to purchase non-food goods, which indicates the strength of the attractions on offer at the store.
- Entertainment and leisure facilities in Harlesden tend to be "poor" at meeting the needs of its visitors. Therefore, an opportunity exists to improve both the amount and quality of these facilities in Harlesden, to meet both the needs of existing visitors and also attract others to the centre.
- Colliers CRE do not publish retail rental data for Harlesden, which means that it is outside the top 610 centres in the UK, and will achieve a lower rental level than the other centres surveyed.

- The Valuation Office Agency's 2005 yield data indicates that yields in Harlesden have remained above 10% during the last decade. Harlesden is a lower order unattractive centre, with no prospects for improvement unless there is direct intervention by public agencies to initiate change.
- The FOCUS database of retailer requirements indicates that there are only 7 national multiple retailers seeking space in the centre. It is usually the case that national retailers will seek space in the larger and busier centres.
- The centre is characterised by the large proportion of local convenience retailers (butchers and greengrocers) and local service retailers (beauty salons and hairdressers).
- Almost 20% of the total floorspace in the centre is in use by A1 convenience retailers. This is very high considering Harlesden does not contain a major food supermarket.
- 10% of the total floorspace in Harlesden is currently vacant, which represents an increase on previous surveys. The re-use of these vacant units should be a priority.
- Harlesden is recognised as a declining centre with vacant units, which in general creates a perception of an unsafe centre. It is the centre with the poorest perceived level of safety in the borough.
- The environmental quality of Harlesden is currently quite poor. This is confirmed by the high proportion of respondents to the shoppers' survey who suggested that environmental improvements were required to the centre.
- Part of Harlesden town centre is within a defined conservation area, and it contains some architecturally attractive buildings made of brick and stone. However, the quality of the buildings above ground floor level is overshadowed by the poor quality shopfronts and signage.
- An urban design strategy for Harlesden could assess the built environment qualities of the centre, and devise a strategy to improve and enhance these qualities.

Willesden Green

Overview

5.11 Willesden Green is identified as a district centre in London Plan and as a Main District centre in the UDP. It is one of the larger district centres in the borough, with a total of 42,400sqm floorspace. The floorspace survey indicates that Willesden Green contains over 26,400sqm of retail floorspace, which equates to 62% of the total floorspace in the centre.

5.12 Willesden Green appears to be a fairly healthy and pleasant centre. The centre is part within a conservation area, and it mostly contains attractive and well-maintained shopfronts. The Sainsbury foodstore and Sainbury's *Local* stores both provide for visitors main and top-up convenience shopping needs, alongside other independent convenience retailers. The centre also contains a cinema and library which provide further attractions to visitors. There are a wide range of eating and drinking uses, which add to the diversity of uses and the attraction of the centre. However, Willesden Green does lack national multiple retailers.

Summary of Survey Findings

5.13 The key findings from the shoppers' and healthcheck surveys of Willesden Green are:

- Lower proportions of visitors cite shopping as the main reason for their visit to Willesden Green, compared to Wembley or Harlesden. This suggests that shopping is less important for Willesden Green's visitors.

- Over half of Willesden Green's visitors use the centre for their main food shopping, which is not surprising since both a Sainsbury superstore and *Local* store are located within the centre.
- The centre is poorly served by non-food comparison retailers, and almost certainly explains why higher proportions of Willesden Green's visitors shop at Brent Cross and Central London, and Kilburn which is in close proximity
- Willesden Green is not particularly good at fulfilling the needs of its visitors, and scores "average" for most shops and services. It scores slightly better than the other centres for entertainment and leisure, which is largely a result of the cinema being located in the centre.
- Willesden Green is particularly weak for fashion and clothes shops - scoring "poor", which is reflected in the lack of national multiple retailers in the centre.
- The lack of national multiple retailers in Willesden Green is clearly demonstrated by the proportion of visitors who wanted to see improvements made to the shops, and fashion and clothes shops in particular.
- Willesden Green achieves prime Zone A rents of £484/sqm, which represents the lowest rental level of all the LB Brent centres for which data is collected, and indeed lower than all other centres in the West London sub-region.
- Yields in Willesden Green have remained above 10% during the last decade. This pattern is similar to that displayed in Harlesden and Cricklewood, and indicates limited investor confidence.
- There are 9 national multiple retailers seeking space in the centre according to the FOCUS database, which is only marginally higher than for Harlesden. Willesden Green is a lower order centre, and the majority of national multiple retailers would prefer to locate in the larger primary centres in the borough.
- The library and the cinema make an important contribution to the diversity of uses within the centre, and will attract visitors to the centre.
- Willesden Green has a low proportion of vacant units.
- In comparison to the other larger centres in the borough, the road which passes through Willesden Green is not a main vehicle route from Central London. Willesden High Road and Walm Lane are still busy roads, but the levels of traffic on them are noticeably lower than those in Wembley, Harlesden, Kilburn and Cricklewood.
- Willesden Green is generally perceived to be one of the safest centres in the borough. This is a positive aspect of the centre, making it more appealing as a place to visit.
- The majority of Willesden Green centre is within a conservation area. The shopfronts and built environment in general are of a higher quality and are better maintained. As a result Willesden Green has the appearance of a more visually attractive centre, containing some interesting buildings.

6 OTHER DISTRICT CENTRES

Introduction

6.1 In this section we provide a summary of the vitality, viability and future prospects of the remaining Main District centres, and the Other District centres. Our assessment is based upon the findings from LB Brent's healthcheck survey and our observations.

Burnt Oak

6.2 The key findings of the healthcheck survey of Burnt Oak are:

- Burnt Oak is defined as a Main District centre in UDP. However, only a small proportion of the floorspace is actually within LB Brent, with the remainder split between LB's Barnet and Harrow.
- Burnt Oak is one of the larger district centres serving the borough's residents.
- Yields in Burnt Oak have remained above 10% during the last decade, which indicates limited investor confidence in the centre.
- The centre contains a high proportion of comparison goods retailers.
- The centre has a good mix of national multiple retailers, such as Tesco, Boots, Woolworths and Peacocks, plus smaller convenience retailers including grocers and butchers in particular.
- There are very few leisure and entertainment uses in the centre, which means that local residents need to travel to other centres for these facilities.
- There are very few vacant units in the centre.
- Burnt Oak is not a particularly attractive centre and the environmental quality could be improved. This assessment applies to the centre as a whole, and improvements will require programmes to be developed in conjunction with neighbouring boroughs.

Cricklewood

6.3 The key findings of the healthcheck survey of Cricklewood are:

- Cricklewood is a defined Main District centre, and is split between Brent and LB Barnet. The floorspace survey indicates that within the centre as a whole there is in total almost 67,000sqm of floorspace, making Cricklewood the second largest centre in the borough behind Kilburn.
- It lacks national multiple retailers and mostly contains local convenience retailers. Those multiple retailers that do exist are mostly grocery retail operators.
- Cricklewood mostly draws its trade from the local area, and does not possess the mix of retail attractions to appeal to visitors from a borough-wide catchment area, in the same way that Wembley and Kilburn do.
- Brent Cross is located a short distance from the centre, and it will continue to operate as the main destination for comparison goods shopping for Cricklewood residents.
- Yield data indicates that yields in Cricklewood have remained above 10% during the last decade. This pattern is similar to other comparable Main District centres in the borough, and indicates that there is limited investor confidence in Cricklewood.
- There is one vacant site within Cricklewood suitable for development, but this is on the LB Barnet side of the centre.

- Cricklewood performs quite poorly as a town centre, which is not surprising since it has been in decline since Brent Cross shopping centre opened in the 1970's.
- Cricklewood would certainly benefit from improvements to its environmental quality through the introduction of programmes to tackle street cleanliness and graffiti. In addition, the pavements can often become congested around bus stops, making easy and uninterrupted pedestrian movement through the centre more difficult.

Ealing Road

6.4 The key findings of the healthcheck survey of Ealing Road are:

- Ealing Road is a defined Main District centre, but is small in comparison to other centres with a similar role in the retail hierarchy.
- Ealing Road is characterised by shops and facilities serving the local Asian community - mostly comprising grocers, jewellers, clothes shops, and restaurants serving Asian food. These characteristics make it a unique and vibrant centre. The grocery stores in particular have stalls and canopies which extend onto the pavement, give the centre a busy and active street scene.
- There are no national multiple retailers in Ealing Road centre.
- The key issue for Ealing Road is the general untidiness associated with the grocery stalls. However, these issues could be resolved through the introduction of a better town centre management regime.

Kenton

6.5 The key findings of the healthcheck survey of Kenton are:

- In the London Plan Kenton is defined as a District Centre, and the LB Harrow UDP defines it as a Local Centre. This current policy approach is clearly inconsistent and needs to be resolved.
- Kenton contains a high proportion of convenience goods retail floorspace, which indicates that the centre is well provided for in terms of convenience retail.
- Kenton has a high proportion of A2 (financial and professional) uses, including accountants, solicitors and estate agents. The centre also contains a couple of medical and health related uses which would also draw visitors to the centre.
- Kenton possesses a limited range of comparison goods retailers. This situation is not surprising as Harrow, a metropolitan centre, is less than a mile away.
- Kenton is an attractive and fairly healthy centre, and cannot be expected to provide the full range of retail facilities because of the close proximity of Harrow town centre.

Kingsbury

6.6 The key findings of the healthcheck survey of Kenton are:

- Kingsbury is defined as a Main District centre in the adopted UDP. A small section of the centre is within LB Harrow.
- The centre is particularly well-served by grocers and bakers, and also contains an Aldi foodstore. However, the comparison goods retailers are mostly small local independents, and there are very few national multiple retailers.
- Kingsbury contains a high proportion of A2 (financial and professional) uses. In Kingsbury's case, these uses mostly comprise estate agents and banks / building societies. Such uses add to the overall attraction of the centre and will encourage visitors to the centre for these basic, often day-to-day, services.

- There is a Fitness First gym located above the Aldi store, which provides leisure and recreation facilities for visitors, and encourages visits to the centre outside normal shopping hours. Kingsbury is one of the few centres in the borough which possesses this type of facility.
- Kingsbury is an attractive centre, which appears to be fairly successful and vibrant. The centre benefits from Kingsbury underground station being within the centre, and the presence of a good and convenient supply of on-street and off-street parking.

Wembley Park

6.7 The key findings from the healthcheck survey of Wembley Park are:

- Wembley Park is currently defined as an Other District centre, and does not include the Asda superstore to the north of the centre, or Stadium Retail Park in the middle of the centre, and nor does it include the office, educational, and hotel buildings in the centre.
- We suggest that all these uses, except Asda, are brought within the defined town centre. Wembley Park will then contain the mix of uses normally found within a District Centre, as defined in PPS6.
- The presence of Asda, Lidl and other smaller grocery stores means that Wembley Park is dominated by convenience goods retail.
- The proportion of comparison goods floorspace is small, and even this is boosted by the presence of Curry's and JD Sport at Stadium Retail Park.
- The centre contains a high proportion of food and drink uses, mostly restaurants, cafes and takeaways. The adopted UDP contains a policy which encourages these types of uses in the southern part of Wembley Park centre - to serve visitors to events at Wembley Stadium.
- Further retail development or expansion of Wembley Park would be undesirable, because it would undermine efforts to redevelop Wembley.

6.8 Below we set out a summary of the healthcheck assessments for the smaller, and lower order district centres in the retail hierarchy.

Colindale

6.9 The key findings of the healthcheck survey of Colindale are:

- It is defined as an Other town centre in the UDP, and is split between Brent and LB Barnet. The emerging Barnet UDP defines the centre as a Local Centre. A consistent definition should be used.
- Colindale largely serves a small local catchment area, and contains small and predominantly local convenience stores, and cafes, takeaways and bars. Asda is the main foodstore serving the local area, but this is located outside the centre, between Colindale and Burnt Oak.
- Oriental City, MFI, Carpet Right and McDonalds are all located beyond the town centre, and effectively diminish the role and function of Colindale as a retail centre.
- Colindale is a fairly quiet but attractive centre.
- There are parking bays outside the shops, which means that the centre benefits from passing trade along the busy A5 road.

Kensal Rise

6.10 The key findings from the healthcheck survey of Kensal Rise are:

- Kensal Rise is one of the smaller defined Other District centres, and is not included as a District Centre within the London Plan.
- Kensal Rise is a fairly busy and quite attractive centre, which mostly contains local independent shops. There are no national multiple retailers in the centre.
- Kensal Rise is characterised by small grocers, butchers, estate agents, cafes and takeaways, and doctors and dentists. All of which serve the immediately surrounding population.
- Kensal Rise contains a high proportion of vacant units, although the vast majority of these occur in very small units - i.e. below 70sqm. The large proportion of vacant units may be a result of the perception of the centre as one which is unsafe.
- The main priority for the centre will be to ensure that the vacant units are re-occupied.

Neasden

6.11 The key findings of the healthcheck survey of Neasden are:

- Neasden is one of the larger Other District Centres.
- Neasden contains a poor range of comparison goods retailers and convenience provision is mostly small local and independent shops.
- Neasden as a centre has suffered because of the close proximity of Tesco at Brent Park (which opened in the 1980’s) and Brent Cross (opened in the 1970’s). It has shown a gradual decline ever since.
- At a result of the general decline in convenience and comparison retail in the centre over the years, one of the dominant uses now found in Neasden is A4 (drinking establishments). While these uses, along with cafes and takeaways, provide attractions for the evening economy, they can also undermine the overall vitality and attractiveness of the centre.
- The centre can appear very quiet at certain times, where very little activity occurs.
- In addition to the competition from other nearby retail stores and centres, Neasden also suffers from having a poor relationship with its surrounding areas.

Preston Road

6.12 The key findings from the healthcheck survey of Preston Road are:

- It is a fairly busy and healthy centre, which mostly meets the needs of its surrounding local population.
- The centre contains a good mix of convenience stores including a Somerfield supermarket, butchers, bakers, newsagents and small greengrocers. All of which will meet the day-to-day shopping needs of local residents.
- There are a limited range of comparison goods retailers, most of which are small local independent operators.
- Preston Road has a large proportion of A2 (financial and professional) uses, mostly estate agents. Theses uses will benefit from window-shopping by passing trade.

Queens Park

6.13 The key findings from the healthcheck survey of Queens Park are:

- Queens Park is the smallest of Brent’s defined Other District centres, but is healthy and appears to be successful at meeting the day-to-day shopping and service needs of its local surrounding population.

- It is an attractive centre containing a good mix of small local shops which mostly serves the surrounding residential population.
- There are also some niche independent shops e.g. selling clothes, books, flowers, antiques and furniture, which meet a more specialist and upmarket local need.
- The bars and restaurants also reflect the upmarket nature of the surrounding residential areas, including a Starbucks, and Pizza Place.
- There is only one vacant unit in the centre.
- Other larger neighbouring centres will be able to provide residents main comparison and convenience shopping needs.

Sudbury

6.14 The key findings of the healthcheck survey of Sudbury are:

- It is only slightly larger than Queens Park in terms of floorspace.
- Sudbury does not possess a supermarket, but does have a number of small grocery stores, which will meet the top-up needs of the surrounding population and passing trade.
- There is a limited range of comparison goods retailers, and unsurprisingly no national multiple retailers.
- The centre does provide a range of other facilities and services which serve the local population, including accountants, solicitors, and estate agents.
- There are three car showrooms in the centre. If the owners of these sites decided to redevelop them, we consider that at least one of them could be used for a small foodstore to add to the retail attraction in the centre.

7 QUANTITATIVE RETAIL NEED ANALYSIS

Introduction & Assumptions

7.1 We have drawn on a combination of surveys and existing/published data to develop a means of assessing the need for additional retail capacity within LB Brent. In accordance with the brief, we consider the capacity for both convenience and comparison floorspace to 2010 and 2015.

7.2 In order to undertake the analysis, we have developed a comprehensive model of current comparison and convenience shopping patterns, based on the results of a household survey undertake by LB Brent in 2003.

7.3 We have not sought to establish the individual capacities for each of the various centres in the borough. Rather we have taken a macro approach - as is common in capacity studies - which assesses the residual expenditure likely to be generated by residents of the whole of the borough, prior to making recommendations as to where retail development to meet the residual expenditure (if any) should be met, taking full account of the hierarchy of existing centres and of planning policy objectives.

7.4 All the monetary values that have been used are in 2001 prices. The analysis provides forecasts using goods based (not business based) expenditure data, in line with guidance in PPS6. We now outline the key data inputs, assumptions and conclusions arising from the needs assessment. The key assumptions are sensitive to the final outputs of the study, and thus we highlighted these with bullet points. A full technical note is provided at **Appendix 2** of the **Full Report.** This provides a step-by-step explanation of each stage in the retail needs assessment. All the economic tables are also included within **Appendices 3 to 5** of the **Full Report**.

Methodology & Capacity Summary

7.5 The steps undertaken to derive the retail capacity of the borough's main centres are as follows:

i) Use the household survey data to establish shopping patterns in 2003;

ii) Forecast the growth of expenditure to 2010 and 2015 allowing for population growth and expenditure growth;

iii) Estimate the proportion of expenditure flowing into LB Brent;

iv) Calculate the turnover performance of the existing floorspace within the LB Brent

v) Calculate the residual expenditure to support new floorspace in the forecast years;

vi) Deduct allowances for growth of floorspace efficiencies, and claims from the turnover of existing committed retail floorspace;

vii) Convert the resulting residual expenditure to a potential sales floorspace capacity for each of the forecast years.

Spending Pattern in 2003

7.6 The LB Brent household survey 2003 provides detailed information on the current shopping patterns of LB Brent residents. The survey identifies shopping habits of households for comparison goods and includes three questions on specific comparison goods types. It also collects data on 'main' and 'top up' convenience goods expenditure.

Population of LB Brent

7.7 We used the GLA population projections provide the most up-to-date and robust forecast of population growth in LB Brent.

7.8 Overall, the population for LB Brent study area (Zones 1-4) is estimated in 2003 (the base date of the study) to be 271,371. In order to consider the mid and longer term forecasts, we have used projections for 2005, 2010 and 2015 to provide a series of forecasting intervals. Based on the forecasts used, the study area population is set to increase to 275,979 by 2005, to 290,856 by 2010 and 303,132 by 2015. Thus it is forecast that the population in LB Brent will increase by circa 32,000 between 2003 and 2015.

Expenditure of LB Brent Residents

7.9 Expenditure estimates have been derived from the MapInfo database, a standard source for expenditure and other datasets. Bespoke expenditure projections on retail goods were commissioned for each of the four expenditure zones in the borough. This is to ensure differences between the current spending within different parts of the study area are reflected in the analysis. The expenditure data provided is in 2001 prices.

7.10 We have made a deduction for special forms of trading[3] for each goods base, and this is a key assumption when forecasting expenditure growth.

7.11 The annual consumer retail expenditure per person within LB Brent is currently £3,582 for comparison goods and £1,865 for convenience goods. This expenditure data is for the base year of 2003, expressed in 2001 the price base.

7.12 We have then generated available spend per capita for 2003, 2005, 2010 and 2015, assuming growth in available expenditure at 4.3 % per annum for comparison goods and 0.9 % per annum for convenience goods.

Retail Capacity

7.13 In order to establish the capacity for comparison and convenience goods within LB Brent, there are a series of steps which must be followed. The detailed explanation of the process adopted is included within our analysis at **Appendix 2** of the **Full Report.** However we have drawn out the main steps in the process are summarised below.

i) Calculate 'LB Brent expenditure' i.e. the pot of money generated by LB Brent residents, but minus an allowance for Special Forms of Trading (SFT), as explained above.

ii) Apply expenditure to the market shares for the different centres and stores within the borough - derived from the LB Brent household survey. This provides us with a pattern of expenditure in 2003, which we use to inform our capacity assessment.

iii) Calculate the 'retained expenditure' i.e. the expenditure of LB Brent residents which is spent within the centres and stores within LB Brent.

iv) Calculate the 'leakage' i.e. the expenditure of LB Brent residents which leaves the borough to be spent in centres and stores outside the borough boundary.

v) Estimate the proportion of 'inflow' into the borough i.e. the expenditure spent in centres and stores in LB Brent by residents living outside the borough.

vi) Add 'inflow' to 'retained expenditure' to calculate the 'aggregate turnover' of LB Brent.

[3] In order to ensure that the forecasts are based on conservative assumptions, deductions for special forms of trading-related expenditure are made in the capacity assessment process. Full details are provided in **Appendix 2**.

vii) Calculate the spending pattern within LB Brent for both comparison and convenience goods base.

viii) Project the spending patterns for each of the forecast years by using population and expenditure projections.

ix) Establish the 'turnover performance' of the centres and stores within LB Brent.

x) Deduct 'turnover performance' from the 'aggregate turnover' to calculate the 'residual expenditure' within LB Brent i.e. the spare capacity which can support new floorspace. This establishes the baseline position in 2003.

xi) Make a series of deductions in order to calculate the residual expenditure in the borough which will be available in 2010 and 2015 to support additional retail development.

xii) Deduct retail commitments from the 'aggregate turnover' i.e. Quintain, LDA scheme, Central Square and Ikea extension - we have assumed these commitments will all be open and trading by 2010.

xiii) Make allowances for development commitments (planning permissions) which are located outside the borough boundary, but will draw some trade for LB Brent residents i.e. White City and Brent Cross extension

xiv) Deduct increases in the floorspace efficiencies of the existing centres and stores in LB Brent i.e. for comparison goods we have thus used 2.25 % per annum and for convenience goods we have used 0.75 % per annum.

7.14 We combine all the calculations to provide two scenarios of capacity in respect of comparison goods, and one scenario for the convenience sector.

7.15 In summary, the retail capacity position at 2015 for LB Brent's centres and for the entirety of all cross-boundary centres is as follows:

- Comparison goods, scenario 1 i.e. excluding Brent Cross: £289.3m
- Comparison goods, scenario 2 i.e. including Brent Cross: £237.3m
- Convenience goods: £108m

Floorspace Requirements

7.16 The spare capacity identified above is the available money to support new floorspace. **Table 7.1** draws together the findings and converts the outputs from each of the comparison and convenience expenditure scenarios - the residual expenditure totals - into theoretical net sales floorspace requirements.

Table 7.1 Conversion of residual expenditure to floorspace requirements

	2010	2015
COMPARISON - SCENARIO 1 (without Brent Cross)		
Spare capacity (£m)	133.2	289.3
Net floorspace requirement (m^2)	21,508	41,791
Gross floorspace requirement (m^2)	29,036	56,418
COMPARISON - SCENARIO 2 (with Brent Cross)		
Spare capacity (£m)	86.7	237.3
Net floorspace requirement (m^2)	14,004	34,287
Gross floorspace requirement (m^2)	18,905	46,288
CONVENIENCE		
Spare capacity (£m)	78.2	108.0
Net floorspace requirement (m^2)	7,654	10,939
Gross floorspace requirement (m^2)	10,333	14,767

Key Recommendations

7.17 In respect of the location of the comparison goods floorspace, we consider this should be directed to the two Major Centres and then the main district centres in accordance with the hierarchy of centre in LB Brent, and the sequential approach as set out in PPS6.

7.18 On this basis the recommended floorspace requirements at 2015 are as follows:

- Wembley comparison goods floorspace: between 14,000 - 16,000 m^2 net
- Kilburn comparison goods floorspace: between 9,000 - 11,000 m^2 net
- Larger District centres: circa 8,000 m^2 net (divided between the centres)
- Borough-wide convenience floorspace: between 10,000 - 11,000 m^2 net

7.19 Having established the retail need and floorspace requirements for the borough, in **Section 8** we identify potential development opportunity sites to accommodate that need.

8 CAPACITY & OPPORTUNITY SITES

Introduction

8.1 In **Section 7** we identified significant requirements for new floorspace in the borough, and comparison goods in particular. In this section we will identify development opportunity sites to accommodate that need.

8.2 The general approach to meeting the identified retail need has three strands:

i) To ensure that the existing retail commitments i.e. Quintain, London Development Agency, and Wembley Central Square are completed as a priority. As such, other retail development should not be brought forward in the short term which may possibly affect the implementation of these schemes.

ii) To allocate development opportunity sites to meet the identified retail need - as set out below.

iii) To identify other suitable sites to be brought forward towards the end of the study period, based upon the retail hierarchy and the adoption of the sequential approach to site selection. As such the priority should be:

- o Wembley and Kilburn - as the Major Centres
- o Cricklewood, Burnt Oak, Harlesden, Willesden Green, Wembley Park, and Kingsbury - as the larger District Centres.
- o Neasden - as a Local Centre in need of regeneration

8.3 Local Centres, except for the identified sites in Neasden, are not really appropriate for new large scale retail development.

Development Opportunity Sites

8.4 To meet the retail need we have identified ten development opportunity sites, half of which are in Wembley. Those sites in Wembley town centre are more likely to proceed when the major retail / leisure commitments have been completed i.e. Central Square, Quintain, and London Development Agency schemes.

8.5 The identified development opportunity sites are:

- Wembley: Curtis Lane Car Park
- Wembley: Wembley Market Site
- Wembley: High Rd / St John's Rd / Ecclestone Mews
- Wembley: Marks & Spencers Site, High Rd / St John's Rd /Elm Rd
- Wembley: Ecclestone Place / High Rd, Wembley - for leisure development
- Kilburn: Kilburn Square Market
- Willesden: Willesden Lane / Walm Lane Triangle Site
- Harlesden: Harlesden Plaza
- Queens Park: Queens Park Station Site
- Neasden Town Centre Sites:
    - o Western end of Neasden Lane / North Circular Road - for a community building
    - o Birse Crescent / Neasden Lane Western Site - for a hotel
    - o Birse Crescent / Neasden Lane Eastern Site - for a small foodstore
    - o Neasden Parade - redevelopment for A1/A3 retail

8.6 The majority of the sites, except where specified, are suitable for retail / mixed use development. The exact site boundary of each opportunity site will need to be determined in conjunction with the landowner.

9 RETAIL STRATEGY & POLICY OPTIONS

Introduction

9.1 Drawing the various strands of this study together, we now explore a range of planning policy options. The Council may wish to consider these as a means of progressing from the background information to mapping out the preferred future development of the borough's main centres. These policy options are based on, and supported by, the survey and analytical work described in earlier parts of this summary.

Suggested Basis for Revised Borough Wide Retail Policies

SP1: The Retail Hierarchy

9.2 There are differences between the adopted Brent UDP, the London Plan, the adopted Harrow UDP, and the emerging Barnet UDP regarding the status of some centres in the borough's retail hierarchy. We suggest that LB Brent adopts the London Plan terminology for town centres, and for consistency, the centres which share boundaries with neighbouring boroughs should be defined at an identical level in the retail hierarchy.

9.3 We do not recommend that Cricklewood becomes a Major Centre, as suggested in the draft West London SRDF. The main reasons for suggesting this approach are because Wembley is, and should remain, the primary centre in the borough, whereas Cricklewood mostly serves its local area only. Cricklewood also lacks a range of comparison goods retailers, and national multiple retailers in particular.

9.4 In terms of Wembley Park, we have recommended that Stadium Retail Park is included within the town boundary because it is immediately adjacent to the middle section of the centre and is well-related to the other retail units. Furthermore, the retail park contains national multiple retailers that are normally found in a larger town centre. As such, we recommend that Wembley Park is redefined as a district centre.

9.5 However, we do not recommend that the Asda and Sainsbury's foodstores are included within Wembley Park and Kenton town centres respectively, primarily because we suspect that shoppers who visit these stores do not undertake linked trips to other shops and facilities in these centres. We recommend that LB Brent undertake a linked trip survey to establish the level of such trips associated with these stores. The results of this survey will assist LB Brent to decide whether improvements should be made to the relationship of these stores and the rest of the respective centres, and whether amendments to town centre boundaries will assist this issue. Therefore, we have recommended that at this stage Kenton remains a local centre - which is consistent with the definition in Harrow's UDP.

9.6 On the basis of the above, we suggest the following retail hierarchy is adopted:

- Major Town Centres - Wembley and Kilburn.
- District Centres - Burnt Oak, Cricklewood, Ealing Road, Harlesden, Wembley Park and Willesden Green.
- Local Centres - Colindale, Kenton, Kensal Rise, Neasden, Preston Road, Queens Park and Sudbury.
- Neighbourhood Centres - the 36 currently defined local centres.

SP2: Town Centre Boundary & Shopping Frontages

9.7 The adopted UDP currently defines primary and secondary shopping frontages for the majority of centres, but town centre boundaries are not defined. We suggest that a town centre boundary should be defined around all major, district and local centres. In most cases the proposed boundary would be tightly drawn and comprise the areas currently identified as primary and secondary frontage.

SP3: Diversity of Uses

9.8 The protection of retail uses in a defined shopping centre is a legitimate objective for planning policy. LB Brent, in common with many other local planning authorities, attempts to retain the amount of retail uses (A1) in a centre by specifying a minimum length of frontage which should be used for such activity. In our opinion, such percentage-based policies can be difficult to defend at a planning appeal, principally because of the frequently arbitrary nature of the percentage definition. In addition, each shopping centre in the hierarchy is different and requires, ideally, an individual response.

9.9 It is clear that for some centres, and the frontages within them, the current percentage of non-retail uses falls below the defined limit. Also, the healthcheck and shoppers' surveys indicate that some centres would benefit from a greater diversity of uses. For example, Wembley would benefit from the addition of restaurants, public houses, leisure uses, and a library - all of which would add to the attraction of Wembley, in particular outside normal shopping hours.

9.10 We are not advocating a complete withdrawal of control of non-retail uses in town centres, but instead LB Brent should introduce more flexibility, where appropriate. In our view, and provided that each centre in the retail hierarchy retains its role, function, and character in accordance with the typologies set out in PPS6, minor changes to the proportion of retail frontage should not materially affect the main shopping function of the centre.

9.11 On the basis of the above, we suggest that LB Brent adopts an alternative approach to non-retail uses in its defined centres. We suggest that primary and secondary frontages are defined for the defined major and district centres, with a general presumption against the loss of retail uses from the primary frontage, except in exceptional circumstances. Greater flexibility towards non-retail uses will be shown in secondary frontages.

9.12 We suggest that in general non-retail uses should only be allowed in circumstances where the proposed use

- Compliments the retail function;
- Retains an active shopfront;
- Does not lead to the loss of a key retail use; and
- Does not lead to the loss of a large retail unit.

9.13 LB Brent should continue with the current caveats concerning the re-use of vacant units, the loss of retail premises with servicing, and A5 hot food takeaway uses, amusement arcades, and mini-cab offices.

9.14 The development of town centre strategies and Area Action Plans will allow LB Brent to develop more detailed policies applicable to each town centre, to ensure that its specific needs and the type of uses required are met. Our suggestions for each centre our set out in more detail below.

SP4: Town Centre Management Schemes and BIDS

9.15 This study highlights various issues and opportunities for the key centres in Brent which town centre management schemes could help tackle. We recommend that emerging area-based Local Development Documents should include details of town centre management initiatives based on the specific merits and analysis of the centre concerned. This approach will help link retail need and capacity with the wider town centre management function, and help target resources to deliver improvements.

Suggested Centre Specific Retail Policies

9.16 Having suggested a partially revised basis for some borough-wide retail policies, we now set out guidelines to assist with a specific policy approach for each centre. In each case, these are based upon a suggested retail strategy and alterations to the centres boundaries. Where appropriate we suggest retail / mixed use allocations in the centre.

Wembley

9.17 Wembley should continue to be promoted as the primary town centre in the borough, with key attractors, other national multiples, and comparison goods retailers directed to the centre. Wembley's place at the top of the town centre hierarchy should be protected from competing development both within the borough and outside i.e. Brent Cross, White City, and other town centres in the sub-region.

9.18 We thus suggest that the overall strategy for Wembley town centre should be:

- To continue reversing decline;
- To improve its position in the UK shopping index; and
- To seek the growth of Wembley.

9.19 This suggested strategy has seven main strands:

i) To identify the need for additional floorspace in Wembley;

ii) To identify development opportunity sites in Wembley to meet the retail need;

iii) To direct the majority of additional comparison goods floorspace to Wembley - as the main centre in the borough;

iv) To seek to retain market share at - recognising that Brent Cross and other competing centres will continue to attract LB Brent residents;

v) To ensure that the development opportunity sites provide modern units which are of sufficient size and are suitable for national multiple retailers;

vi) To increase the number of key attractors in Wembley; and

vii) To undertake a programme of environmental improvements.

9.20 Development briefs for the opportunity sites should, if possible, be prepared for the opportunity sites in conjunction with interested key attractors and developers.

9.21 In terms of Wembley's town centre boundary, we suggest that it extends eastwards to include the retail commitments associated with the redevelopment of Wembley Stadium. This approach will promote a clear message that Wembley is one centre.

Other Centres

9.22 The suggested strategy for the borough's other centres can be summarised as follows:

- **Kilburn** - to concentrate town centre uses within existing centre;
- **Harlesden** - to improve the range of town centre uses, allocate a site within the centre for a food superstore, and undertake an urban design / streetscape;
- **Willesden Green** - to attract more national multiple retailers;
- **Burnt Oak** - to protect the range of convenience and comparison uses in the centre, and improve the overall shopping environment;
- **Cricklewood** - to remain as a district centre in the retail hierarchy, and to undertake any improvements required and identify development opportunities in conjunction with LB Barnet;
- **Ealing Road** - to retain and strengthen the unique character of the centre, and restrict the expansion of Ealing Road;

- **Kenton** - to remain a local centre in the retail hierarchy, not include Sainsbury's in the town centre boundary, and undertake a linked trip survey to establish the level of such trips;
- **Kingsbury** - to protect the health and good mix of local shops, and amend the centre boundary and retail frontage to include the former Prince of Wales PH when redevelopment is complete;
- **Wembley Park** - to be redefined as a district centre by bringing Stadium Retail Park within the town centre boundary but not include the Asda store, and undertake a linked trip survey to establish the level of such trips;
- **Colindale** - to protect its role as mostly meeting the local convenience needs of its surrounding population.
- **Kensal Rise** - to retain the centre's pleasant shopping environment;
- **Neasden** - to enhance the bar and evening economy character of the centre (subject to public realm management and enforcement controls), and allocate sites for a small foodstore and other town centre uses to regenerate the centre;
- **Preston Road** - to retain the good mix of local convenience, comparison, and service retail uses which meet the top-up needs of the surrounding population;
- **Queens Park** - to protect the attractive, independent, and upmarket character;
- **Sudbury** - to protect the local role of the centre; and allocate one of the motor vehicle sales centre sites for a new retail attraction in the centre.

Need for Updated Household Survey

9.23 Our need assessment has been based on the LB Brent household survey 2003, which has been adequate in order to assess the shopping patterns in the LB Brent and to calculate the capacity for comparison and convenience goods. However, we recommend a further survey is undertaken in say two to three years time which can update the findings of this study. We consider this survey should be a telephone survey undertaken by a recognized household survey company which includes the following:

- A catchment area which goes beyond the borough boundary - if only marginally in some locations.
- The division of this catchment area into broad zones which reflects the main centres within this catchment area.
- The household survey questions should identify every major food store in the borough and all major food stores within five kilometers from the edge of the borough boundary. This list should be included.
- The household survey questions should ask five separate questions on comparison goods which fit with the recognized MapInfo definitions of the types of comparison goods expenditure.
- Ensure a response rate of at least 0.4 % of the population in each survey zone, as recommended by household survey companies. For LB Brent this equates to a survey with approximately 1,000 responses in total.