



Appendix 4 – Former Stanmore and Edgware Gold Centre, Assessment of Need

Former Stanmore and Edgware Golf Centre

Assessment of Need

May 2022

This paper has been compiled by Turley Economics in regard to the assessment of need for a banqueting facility in Harrow.

Until very recently, the Appellant had a banqueting facility – ‘Premier Banqueting’ – on Canning Road, Harrow, catering for large celebratory events, predominantly for members of the Borough’s South Asian and other ethnic communities. However, Premier Banqueting has been forced to close due to the proposed construction of the Council’s new Civic Centre on the site of the adjacent public car park which was extensively used for events at Premier Banqueting. Premier Banqueting has operated in Harrow since 2008, with the business relocating in 2012 to Canning Road to meet the growing demand for events.

The proposed development subject to the planning appeal is for a banqueting facility for Premier Banqueting.

This Assessment of Need provides analysis relating to the following matters:

- Evidence on the size and shape of the Asian and ethnic wedding market in the UK
- Evidence of the Asian and ethnic wedding market in London Borough of Harrow, benchmarked to national comparators
- Evidence on the existence of a “sub-regional market area” in North West London and neighbouring authority areas, relating to the location of the proposed development at Brockley Hill
- Customer demand-based evidence of the market for Asian and multicultural weddings locally
- Supply of potential alternative venues within the defined sub-regional market area
- Consideration of the type of economic impacts (or benefits) that are likely to be associated with the proposed development

This briefing note has been supported by primary data on customers (including information provided by the Appellant as well as a survey of individuals making enquiries), events and supply chain relationships supplied by the Appellant and secondary published data in the form of the Census of Population (2011) and Annual Population Survey.

Overview of Findings

1. Asian weddings account for over one third (£5bn) of the £14.7bn national wedding industry. This industry is a significant employment generator in its own right and supports 400,000 jobs in a wide range of sectors.
2. Asian weddings are typically large-scale events, with between 350 and 500 guests (sometimes up to 1,000) requiring sufficiently scaled venues with a range of specially designed and operated facilities to meet multi-cultural and different religious needs.
3. Specific wedding venue requirements include capacity to host 300 plus guests; sufficient height and space to accommodate a stage and arch (Mandap) for Hindu ceremonies; accommodating various religious dietary requirements; and ability to offer gender segregated events.
4. Harrow has a set of unique demographic characteristics which create demand for Asian and other ethnic weddings. The borough has an above average representation of Asian and Asian British residents; residents of Hindu and Muslim faiths; and a residential population with an above average propensity for marriage.
5. Home addresses of those hosting events at Premier Banqueting indicate a Sub Regional Market Area covering the local authorities of Harrow, Hertsmeire, Watford, Brent and Barnet.
6. Customer survey responses substantially confirm that Harrow was the preferred location for hosting a wedding. Location (Harrow) was a primary attractor (following price and size of venue) for prospective customers, along with proximity to family and friends who will be guests at weddings.
7. Of those surveyed who enquired at Premier Banqueting but held their events elsewhere in Harrow, all 15 were held at VIP Lounge which is now closed.
8. There are no comparable venues in London Borough of Harrow. The recent closure of both Premier Banqueting and VIP Lounge means that there is no suitable provision for couples to host Asian and ethnic weddings in their borough. This means that at present the needs of these groups are not being met in accordance with the Equality Act 2010.
9. There are relatively few venues in the sub-regional market area which meet the specific requirements identified for Asian and ethnic wedding (7 venues).
10. Customers unable to host a wedding in Harrow have to look further afield to find a suitable venue that meets all of their requirements. While there is a Greater London dynamic in the alternative venues in which weddings were actually hosted, approximately 54% (60) of respondents held their weddings in locations outside Greater London.
11. Approximately 38% (42) of customers unable to host a wedding at Premier Banqueting held their weddings outside of London and the immediate surrounds, demonstrating a lack of suitable venues available in the local market. The majority of these took place in venues located 100 to 300km from Harrow with many venues located in Birmingham, Bolton, Leicester, Sheffield and Manchester.
12. Beyond the specific social and cultural need to provide appropriate venues to support life events of Harrow residents, Premier Banqueting creates local economic benefits particularly in relation to its supply chain (8 of its recommended suppliers are located in the borough) and through

related spend of wedding guests on accommodation and leisure for example. The average Asian wedding costs in the range of £70,000-£100,000 compared to £30,000 average cost for all UK weddings. These benefits will be foregone with Premier Banqueting no longer operating in the borough.

The size and shape of the Asian wedding Market

Key points:

- There is a large customer market associated with the wedding industry nationally and this is evident in the significant levels of annual expenditure that it sustains.
- Asian weddings account for over one third (£5bn) of the £14.7bn national wedding industry. This industry is a significant employment generator in its own right and supports 400,000 jobs in a wide range of sectors.
- Asian weddings are typically large-scale events, with between 350 and 500 guests (sometimes up to 1,000) requiring sufficiently scaled venues with a range of specially designed and operated facilities to meet multi-cultural and different religious needs.
- Asian weddings generate high levels of expenditure within the economy both in absolute and relative terms. The average Asian wedding costs in the range of £70,000-£100,000 compared to £30,000 average cost for all UK weddings. Thus, Asian weddings have a relatively larger economic impact than other types of wedding, as significant amounts of expenditure are experienced through the business supply chain.

13. The Asian Weddings Association estimates the economic value of the sector at £5 billion per annum¹. This is equivalent to 'just over a third' of the value of the UK's total wedding sector, valued at £14.7bn².
14. Asian and other ethnic weddings tend to be large scale events. Whilst the average number of guests at a UK wedding is circa 80, weddings within ethnic communities can range between 350 and 500 guests with very large weddings even reaching up to 1,000 guests³. The average cost of a UK wedding is around £30,000, whereas ethnic weddings typically cost between £70,000 to £100,000.
15. The Asian wedding market in the UK is diverse and caters to a wide range of ethnicities, religions, and cultures. Asian wedding venues provide specific cultural and religious requirements to meet the needs of the south Asian community as well as other ethnic communities including African, Afghani and Arabic communities. These needs are met both through the specific design of

¹ <https://www.awauk.org/representation>

² <https://whataboutweddings.co.uk/article/asian-wedding-businesses-left-behind-during-pandemic-call-on-government-to-recognise-the-cultural-significance-of-weddings/>

³ <https://www.hitced.co.uk/wedding-planning/organising-and-planning/what-is-classed-as-a-small-medium-and-large-wedding/#:~:text=By%20hitced.co.uk&text=For%20example%2C%20a%20Hitced%20survey,guests%20for%20a%20large%20wedding.>

buildings and spaces and also through the operation of these facilities and the in-house services that they offer.

16. It is not uncommon for ethnic weddings to run through several events over the course of a day (a morning event and an evening event). Given the diversity in ethnicity, religion and culture amongst ethnic communities, various wedding ceremonies and events are arranged including sangeets, mehndis, baraats, nikahs, walimas and haldis to name a few. Further information on these is provided in the Glossary. These typically occur over number of days with each event planned and hosted on different days.

Residential Location of Customers

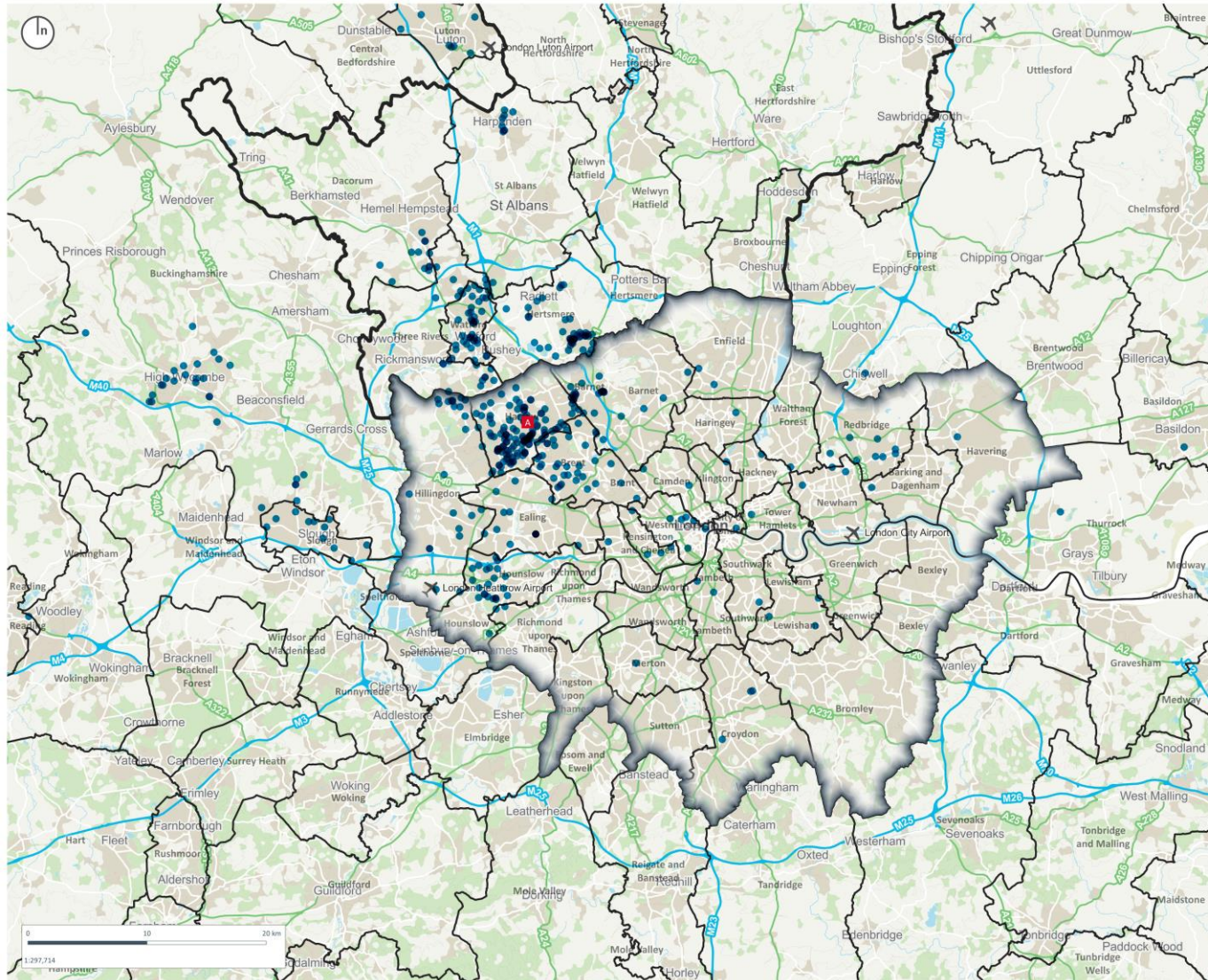
Key points:

- Approximately one third of customers hosting events at Premier Banqueting between 2017-2020 originated from the local authority of Harrow.
- Analysis of 2017 to 2020 based customer data supplied by the Appellant identifies the existence of a sub-regional market area and localised sources of demand for Asian and ethnic weddings.
- Approximately 59% of customers hosting events at Premier Banqueting between 2017 and 2020 originated from five local authorities – Harrow, Watford, Hertsmere, Barnet and Brent. This demonstrates a high level of self-containment.

17. Customer data has been supplied by the Appellant for Premier Banqueting for four years of operation from 2017 to 2020 inclusive in order to examine the nature of demand and geographical extent of the market area.
18. Based on 2017-2020 data provided by Premier Banqueting, the scale and extent of the local and sub-regional market areas can be illustrated. The 2017-2020 data analysed demonstrates that:
- 29% of functions are hosted by couples and families originating from Harrow;
 - 59% of couples and families live within Harrow, Watford, Hertsmere, Barnet and Brent. This is termed the **sub-regional market area**; and,
 - 80% of couples and families live within Greater London.
19. Map 1 below shows the locations of couples and families who held functions at the Premier Banqueting venue between 2017 and 2020. It is evident that **there is a significant degree of self-containment and localised enquiries as 59% of events originate from couples and families who reside within the sub-regional market area.**

Map 1: Location of couples/families who have enquired/planned functions at the Premier Banqueting venue between 2017 and 2020

Source: Premier Banqueting Ltd.



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- Sites - A - Existing site
- Couple Addresses (2020 - 2017)
- County & Unitary Authorities
- Local Authorities
- London Boundary

CLIENT: Sairam (Holdings) Ltd

PROJECT: Brockley Hill

DRAWING: Map of couple addresses

PROJECT NUMBER: SRHP3000

DRAWING NUMBER: GIS_102 CHECKED BY: AG

REVISION: 1.2 STATUS: Draft

DATE: March 2022 SCALE: 1:297,714 @ A3

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Understanding the sub-regional market area for Premier Banqueting

Key points:

- Spatial analysis of leading Census ethnicity and religious indicators shows evidence of a pronounced concentration of Asian communities and religions requiring specialist wedding venues of scale within London Borough of Harrow.
- Harrow is notably diverse and multicultural as evidenced by official data sources such as the Census and Annual Population Survey.
- A high concentration of people living locally in Harrow belong to Asian/British Asian ethnic groups in Harrow.
- High demand for Asian wedding venues is driven by the diverse and multicultural demographic that is evident in the sub-regional market, as well as the higher propensity for marriage in this geography and Harrow in particular.
- A high concentration of protected characteristic groups as defined by the Equality Act 2010 exist in Harrow and the sub-regional market area. The majority of users of Premier Banqueting venue identify with at least three of the nine protected characteristics (race, religion or belief, and marital status).
- The absolute scale and concentration of Asian and other ethnic communities and religious affiliations provides a local source of ongoing custom for specialist venues catering to the needs of these communities.

20. Census 2011 data has been used to profile the characteristics of the local area, the wider sub-regional market area and regional and national comparator areas. The following area definitions are used in the proceeding sections of the paper:

- Local area – relating to the administrative area of Harrow Council
- Sub-regional market area – relating to the administrative areas of Harrow, Hertsmere, Watford, Brent and Barnet councils.
- Regional – London; and
- National – England (or England and Wales, dependent on data availability)

Analysis of evidence supporting the existence of a sub-regional market area

21. Under the Equality Act 2010⁴, public organisations and those delivering public functions are subject to a Public Sector Equality Duty (PSED) and are required to show due regard for the need to:
 - Advance equality of opportunity between people who share a protected characteristic and those who do not; and
 - Take steps to meet the needs of people with certain protected characteristics where these are different from the needs of other people.
22. Weddings are more than just parties and for many in the Asian community the societal and cultural element is considered a rite of passage with significant religious importance.
23. Race is defined within the Equality Act 2010 as encompassing colour, nationality, and ethnic group. Based on Census data⁵, 85.4% of the population in England identifies as White with the next largest ethnicity being Asian/Asian British at 7.8% of the national population.
24. As can be seen in Table 1, Figures 1 and 2, and Maps 2 and 3 below, **Harrow and the sub-regional market area include a greater proportion of ethnic minority residents than the London average, and significantly more than the England average.** Harrow is a diverse multicultural borough, with 57.8%⁶ of the population belonging to Black and Minority Ethnic (BME) communities. The sub-regional market area is also more diverse compared to the national geography with 46% of the population in the sub-regional market area belonging to BME communities.
25. Harrow particularly has a high proportion of people belonging to Asian/British Asian ethnic groups. More than one in three or 42.6% of people living in Harrow identify as Asian/British Asian. This trend is also evident in the sub-regional market area as 27.1% of the population belongs to Asian/British Asian ethnic groups in comparison to 18.5% in London and 7.8% in England.

⁴ The Equality Act 2010 sets out duties relating to race, disability, sex, age, sexual orientation, gender reassignment, pregnancy and maternity, marriage and civil partnership, and religion or belief. These are the grounds upon which discrimination is unlawful and are referred to as protected characteristics.

⁵ Secondary survey data such from the Office for National Statistics' (ONS) 2011 Census has methodological limitations related to data collection and surveys only represent the socio-economic context at a specific point in time. The updated Census 2021 results will be published for England and Wales in early summer 2022.

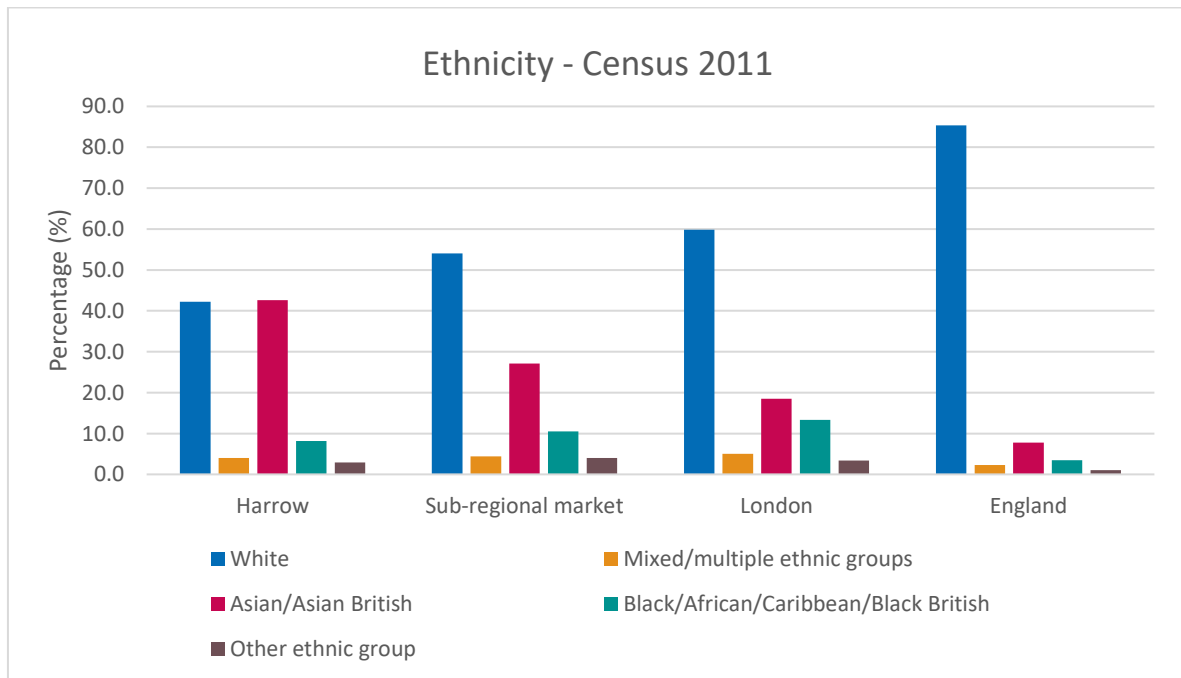
⁶ ONS via Nomis (2011). Census 2011. Census 2011 categories are White or White British people (English, Welsh, Scottish, Irish, Northern Irish, Gypsy or Irish Traveller, Other White); Asian or Asian British people (Indian, Pakistani, Bangladeshi, Chinese, Other Asian); Black or Black British (African, Caribbean); Mixed Race (White and Black Caribbean, White and Black African, White and Asian, White Other); and Other Ethnic Groups (Arab or Other groups).

Table 1: Ethnicity based on Census 2011 data

Ethnicity	Harrow		Sub-regional Market		London		England	
	Number	%	Number	%	Number	%	Number	%
White	100,991	42.2	1,096,989	54.0	4,887,435	59.8	45,281,142	85.4
Mixed/multiple ethnic groups	9,499	4.0	48,166	4.4	405,279	5.0	1,192,879	2.3
Asian/Asian British	101,808	42.6	297,275	27.1	1,511,546	18.5	4,143,403	7.8
Black/African/Caribbean/Black British	19,708	8.2	114,927	10.5	1,088,640	13.3	1,846,614	3.5
Other Ethnic Group	7,050	2.9	44,188	3.5	281,041	3.4	548,418	1.0

Source: Census 2011

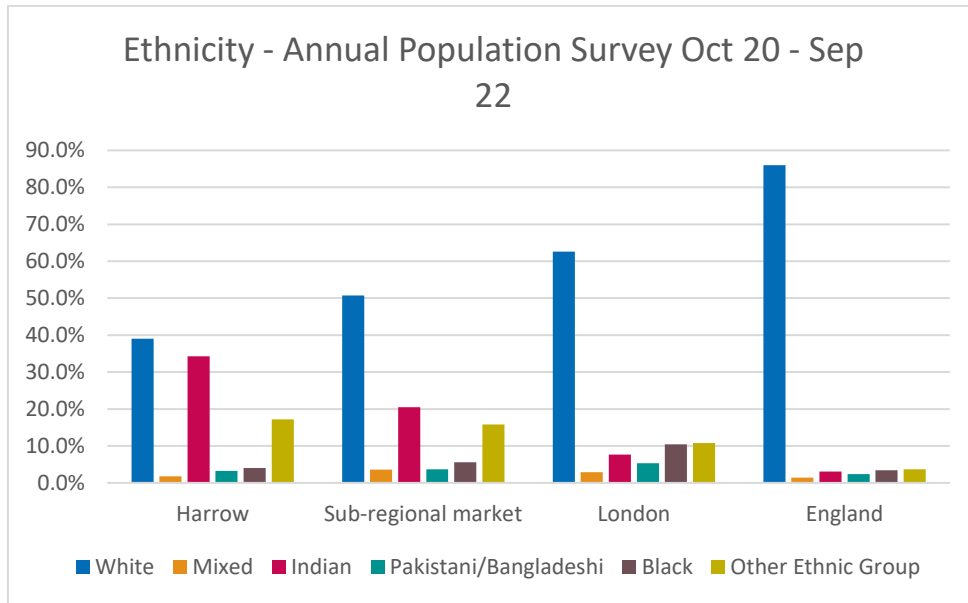
Figure 1: Ethnicity based on Census 2011 data



Source: Census 2011

26. Analysis of ethnicity data obtained from the most recent Annual Population Survey shows a similar demographic split to that shown by the Census. A high proportion of the population in Harrow identify as Indian (34.3%) in comparison to the sub-regional market area (20.5%), London (7.7%) and England (3.1%). Figure 2 shows ethnicity across the comparative geographies.

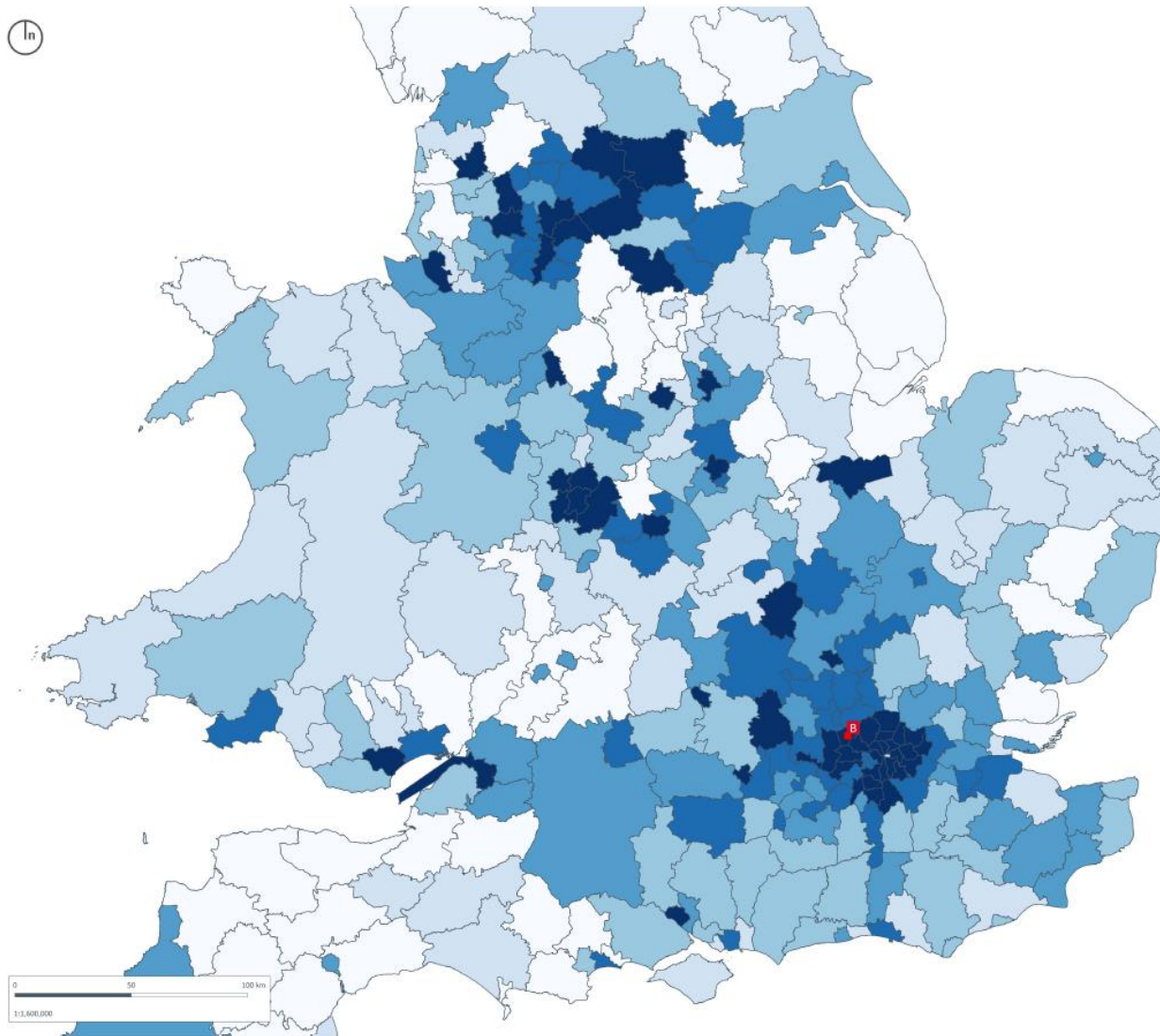
Figure 2: Ethnicity based on Annual Population Survey (2021) data



Source: Annual Population Survey (2022) Ethnicity by age

Map 2: Distribution of Asian/Asian British ethnic groups by local authority

Source: Census 2011

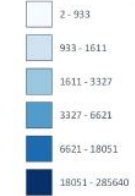


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■ Sites - A - Existing site, B - Proposed Site

□ Local Authorities

Ethnic Group Ethnic group (Asian/Asian British: Indian, Asian/Asian British: Pakistani, Asian/Asian British: Bangladeshi, Asian/Asian British: Chinese, Asian/Asian British: Other Asian) by Local Authority (2017)



CLIENT:
 Saram (Holdings) Ltd

PROJECT:
 Brockley Hill

DRAWING:
 Map of showing Ethnic Group by Local Authority

PROJECT NUMBER:
 SRHP3000

DRAWING NUMBER: GIS_ID6 CHECKED BY: AG

REVISION: I.O STATUS: Draft

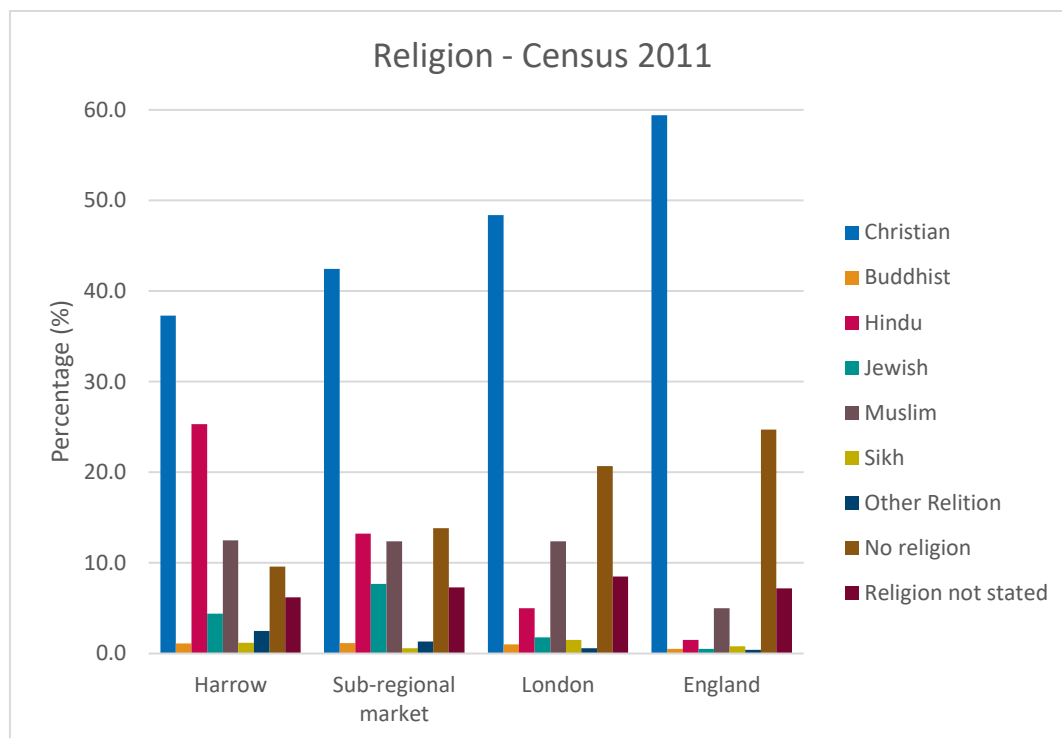
DATE: March 2022 SCALE: 1:1,600,000 @ A3

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27. Religion or belief is one of the nine characteristics that are protected by the Equality Act 2010 and refers to any religion, including lack of religion or philosophical belief. Generally a belief affects life choices and the way in which individuals live. Whilst the majority of the population across all comparative geographies identifies as Christian, **there is a clear concentration of people who identify as Hindu and Muslim in Harrow and the sub-regional market area.**
28. Figure 3 and Maps 4 and 5 below show the distribution of religious beliefs across different locations. **One in four (25.3%) of residents in Harrow identify as Hindu which is comparatively higher** than witnessed in the sub-regional market are (13.2%), significantly higher than London (5.0%) and England (1.5%). **More than one in ten residents in Harrow and the sub-regional market area (12.5% and 12.4% respectively) identify as Muslim.**

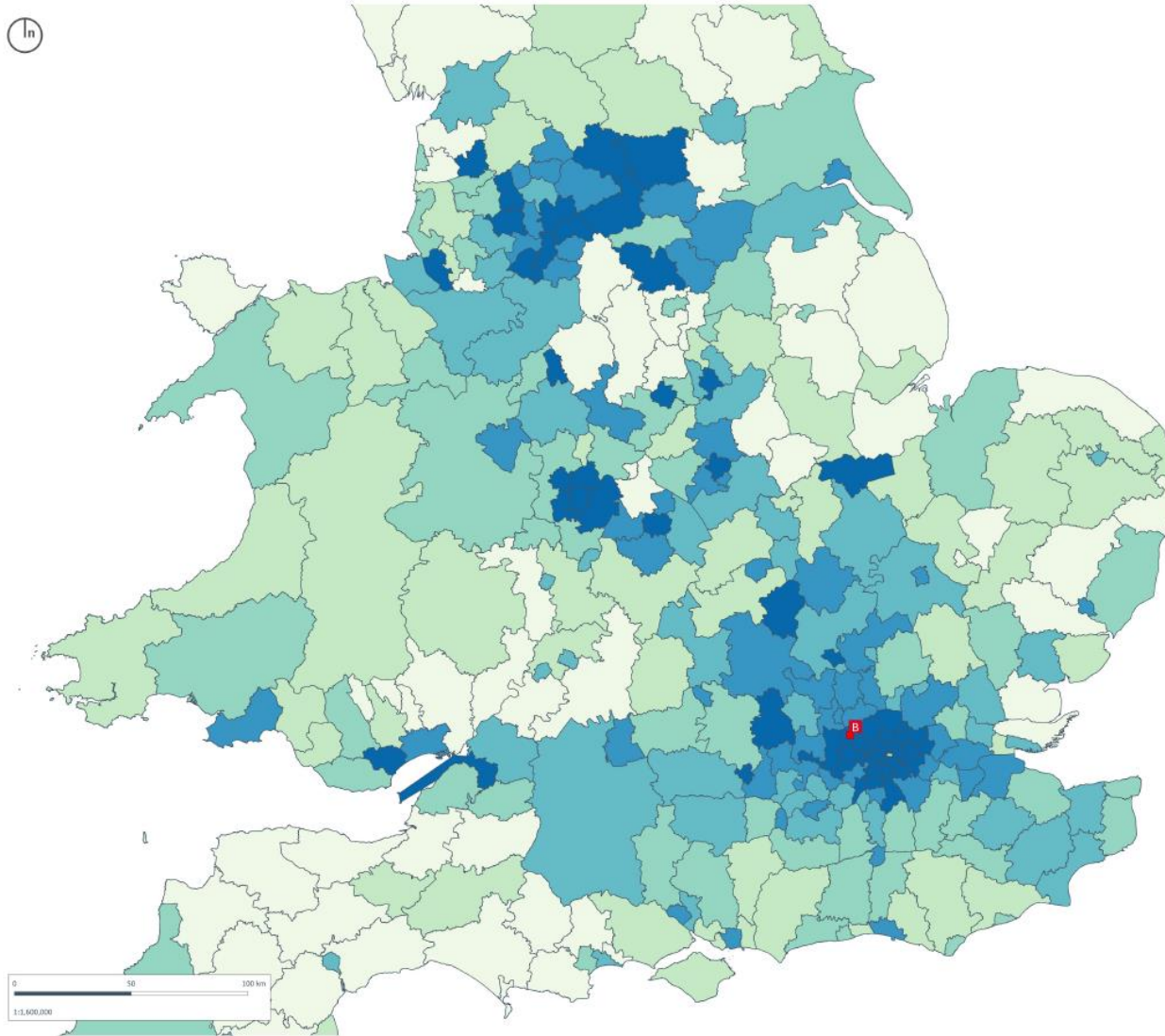
Figure 3: Religion based on Census 2011 data



Source: Census 2011

Map 4: Distribution of people with religious beliefs (identified as Hindu, Muslim or Sikh) by Local Authority

Source: Census 2011



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■ Sites - A - Existing site, - B - Proposed Site

□ Local Authorities

Religion (Hindu, Muslim, Sikh) by Local Authority (2011)

- 4 - 565
- 565 - 926
- 926 - 2134
- 2134 - 4752
- 4752 - 16227
- 16227 - 289149

CLIENT: Sarvam (Holdings) Ltd

PROJECT: Brockley Hill

DRAWING: Map of showing Religion by Local Authority (Hindu, Muslim, Sikh)

PROJECT NUMBER: SRHP3000

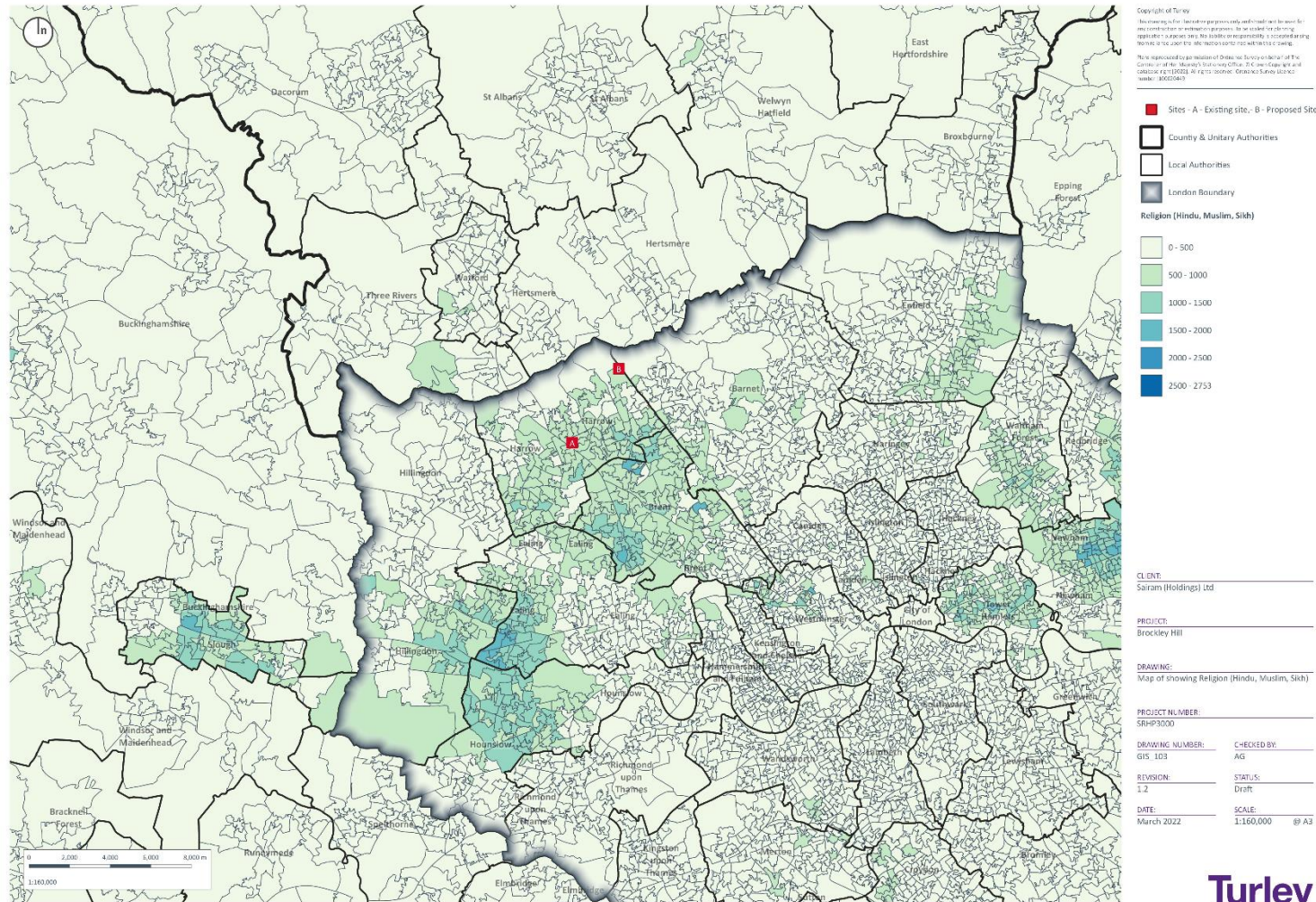
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REVISION: L.O STATUS: Draft

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Map 5: Distribution of people with religious beliefs identified as Hindu, Muslim or Sikh (Census 2011 LSOAs in North West London)
 Source: Census 2011



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29. In summary, published data from the Census and Annual Population Survey show that there are pronounced ethnic, cultural and religious clusters within Harrow and the wider Sub Regional Market Area.
30. People who are married or in a civil partnership are also considered to share protected characteristics as identified in the Equality Act 2010. Harrow is notable within this geography for having an above average presentation of married individuals. Over half of the adult population (54%) are married compared to 48% across the sub-region and 40% for London as a whole. See Table 2.

Table 2: Propensity for Marriage

	number	%
Harrow	102,502	54
Sub-region	414,961	48
London	2,608,345	40
England	20,029,369	47

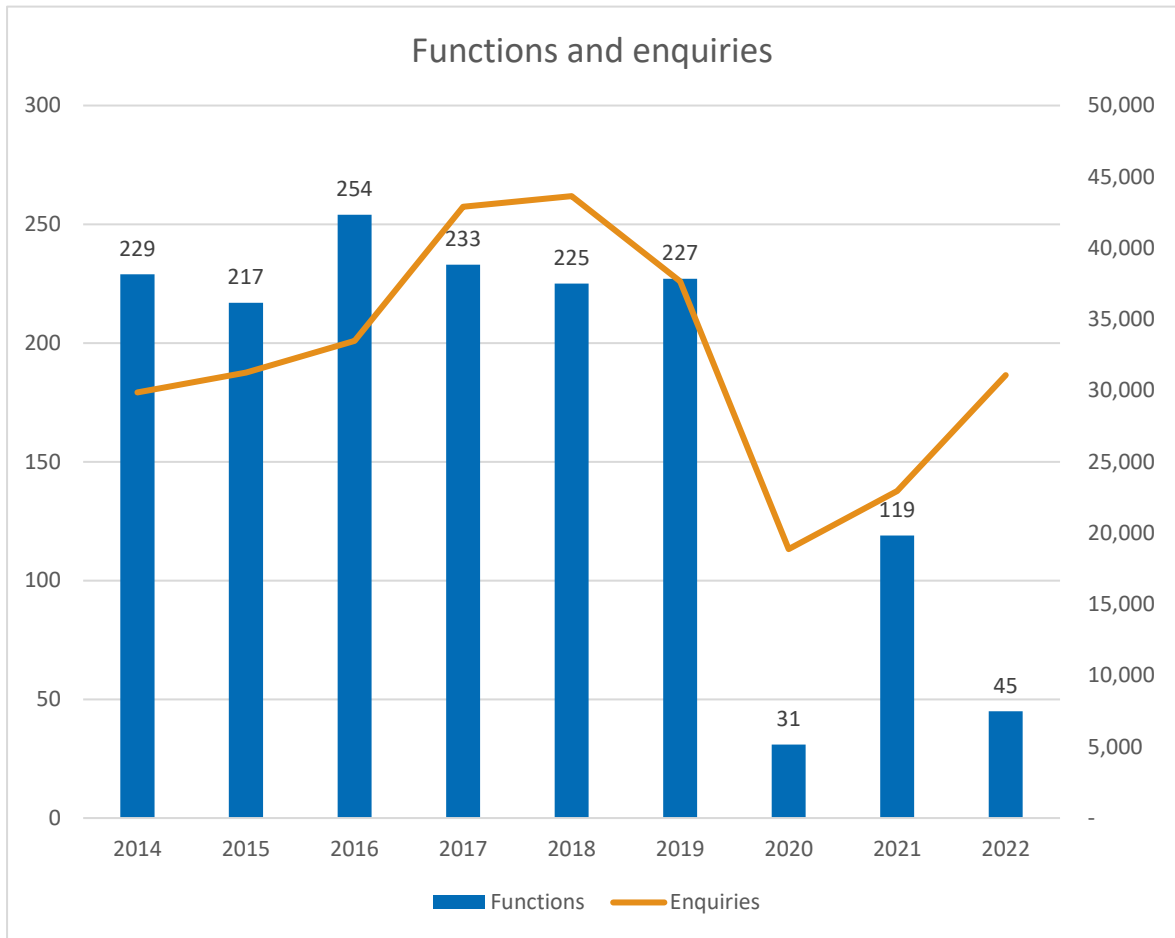
Source: Census, 2011

Customer Demand-Based Evidence of the Market

31. Discussions with the Appellant have established that aside from the COVID-19 lockdown induced closure, Premier Banqueting was open for business every day of the year prior to its closure in April 2022. Between 2014 and April 2022, a total of over 1,500 functions (1,387 of which occurred pre-pandemic) were held at the Premier Banqueting venue⁷ as shown in Figure 4 below. The pre-pandemic average number of functions was 231 per annum (2014-2019 data). This highlights the strength of the customer market and illustrates that Premier Banqueting is a well-used and highly utilised venue.
32. The Appellant has also shared the headline level of enquiries received on an annual basis which provides further evidence of the scale of potential or latent demand. The number of enquiries Premier Banqueting receive annually far surpasses the number of functions the venue can accommodate demonstrating latent unmet demand. However, some caution should be exercised in the use and interpretation of this data as many of the enquiries are not suitable for Premier Banqueting (either being too small or in relation to days / times that are not available).

⁷ Information provided by Premier Banqueting Ltd.

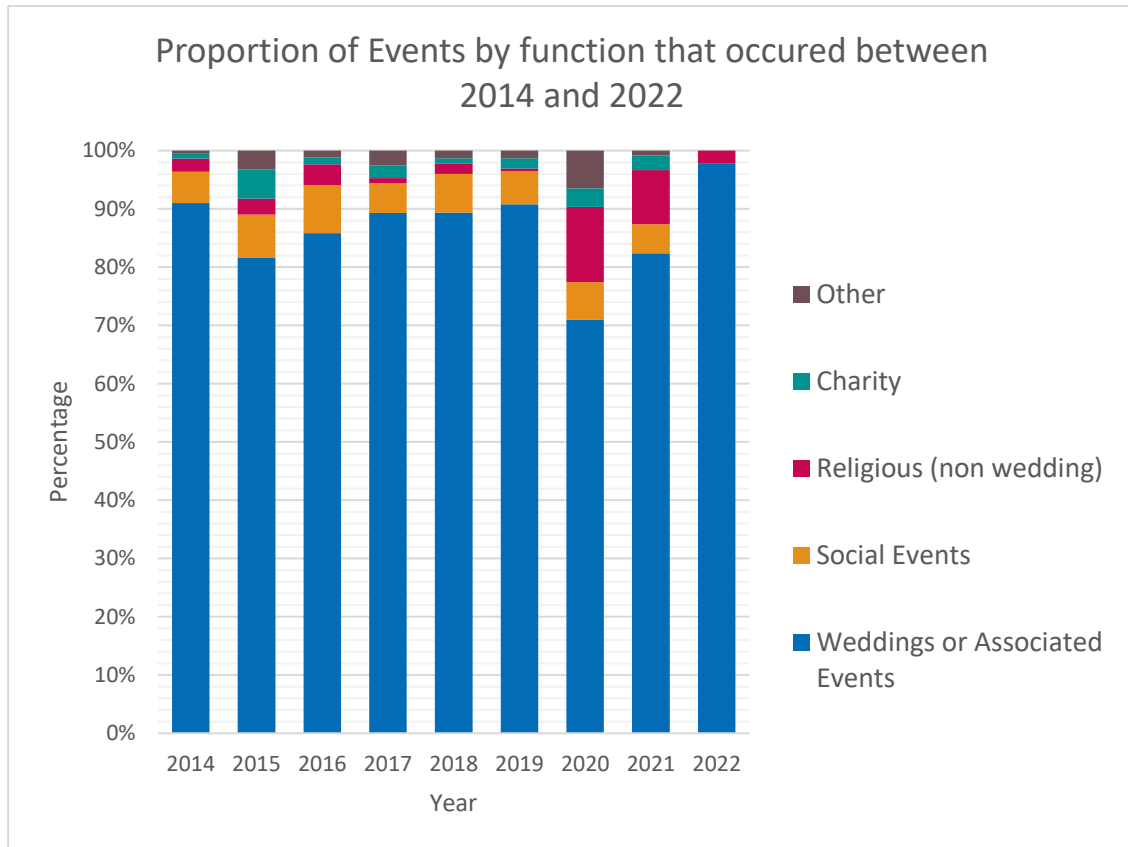
Figure 4: Number of functions that occurred at Premier Banqueting and number of enquiries between 2014 and 2022



Source: Premier Banqueting Ltd.

33. The majority of events held at the Premier Banqueting venue are for wedding or associated events. Figure 5 below illustrates the proportion of events by function type that occurred at the Premier Banqueting venue between 2014 and 2022. Local schools, businesses and charities occasionally utilise the venue for various functions. Whilst the venue is mainly used for wedding functions, it is also used for other functions including Christmas, New Year and other social events, as well as for other religious, charity and other uses.

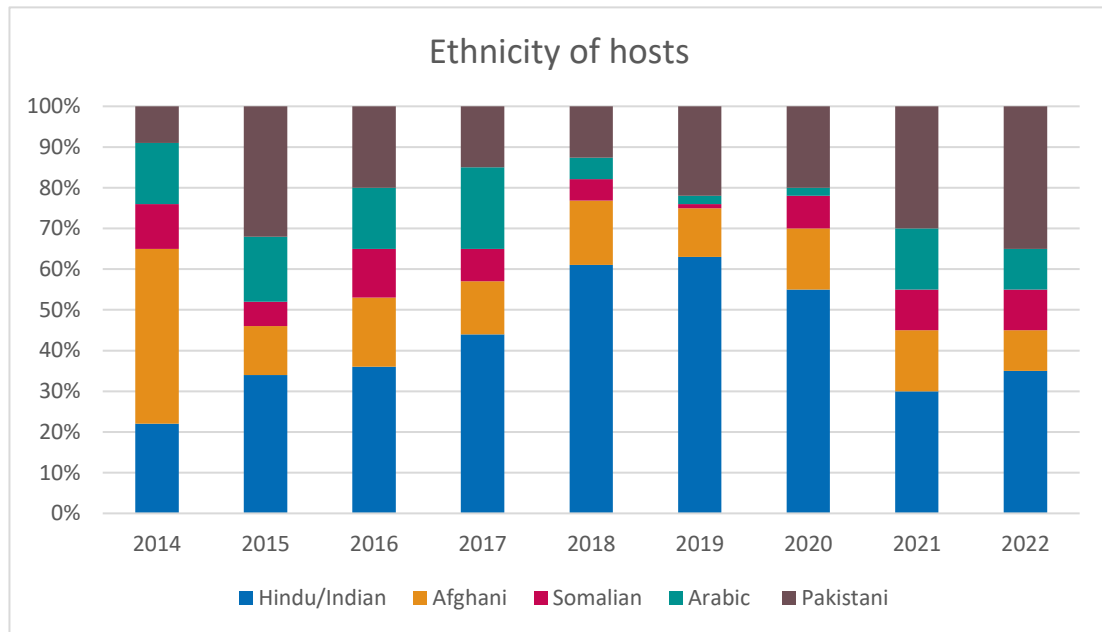
Figure 5: Proportion of Events by function type that occurred at Premier Banqueting between 2014 and 2022



Source: Premier Banqueting Ltd.

34. Discussions with the Appellant have highlighted that Premier Banqueting has many years of experience in accommodating multicultural functions for a diverse range of ethnic and religious groups which are also referred to by the Equality Act 2010 as protected characteristic groups. Over the years, the Premier Banqueting venue has been considered a preferable wedding venue by function hosts from Indian, Afghani, Somalian, Arabic and Pakistani backgrounds.
35. Figure 6 below shows data obtained by Premier Banqueting on the ethnicities of the hosts that chose the venue for a diverse range of functions. A key part of Premier Banqueting’s unique proposition in the market is their knowledge and understanding of the different cultural and religious requirements of ethnic communities. These include specific dietary requirements and cultural requirements such as the need for segregation between male and female guests for specific religious events. Their facilities and the services that they offer are specifically designed to meet these diverse requirements and this is considered to be a unique proposition or selling point in attracting customers at an affordable price.

Figure 6: Ethnicity of hosts of Functions at Premier Banqueting between 2014 and 2022



Source: Premier Banqueting Ltd.

Availability of Alternative Venues in Sub-regional Market Area

Key points:

- A long list of 30 potential venues has been identified in the sub-regional market area, incorporating the previous supply side work undertaken by HGH and extending this to reflect the market area.
- An initial sifting exercise using a minimum capacity threshold of 300 guests (a typical Asian wedding has 350 guests), removes 10 of the identified venues on this measure alone.
- Turley Economics has reviewed the shortlisted 20 venues against specific criteria for ethnic weddings and has identified that there are no comparable alternative venues in London Borough of Harrow, leaving a significant gap in the market since the closure of Premier Banqueting.
- Across the Sub Regional Market Area:
 - 7 venues positively meet these requirements (i.e. they are geared towards catering for Asian and ethnic weddings).
 - 9 venues largely meet these requirements (i.e. they are able to cater for some Asian and ethnic weddings but stricter cultural or religious requirements may not be fully met).
 - 2 do not appear to meet these requirements (i.e. they would not be able to adequately cater for Asian and ethnic weddings).

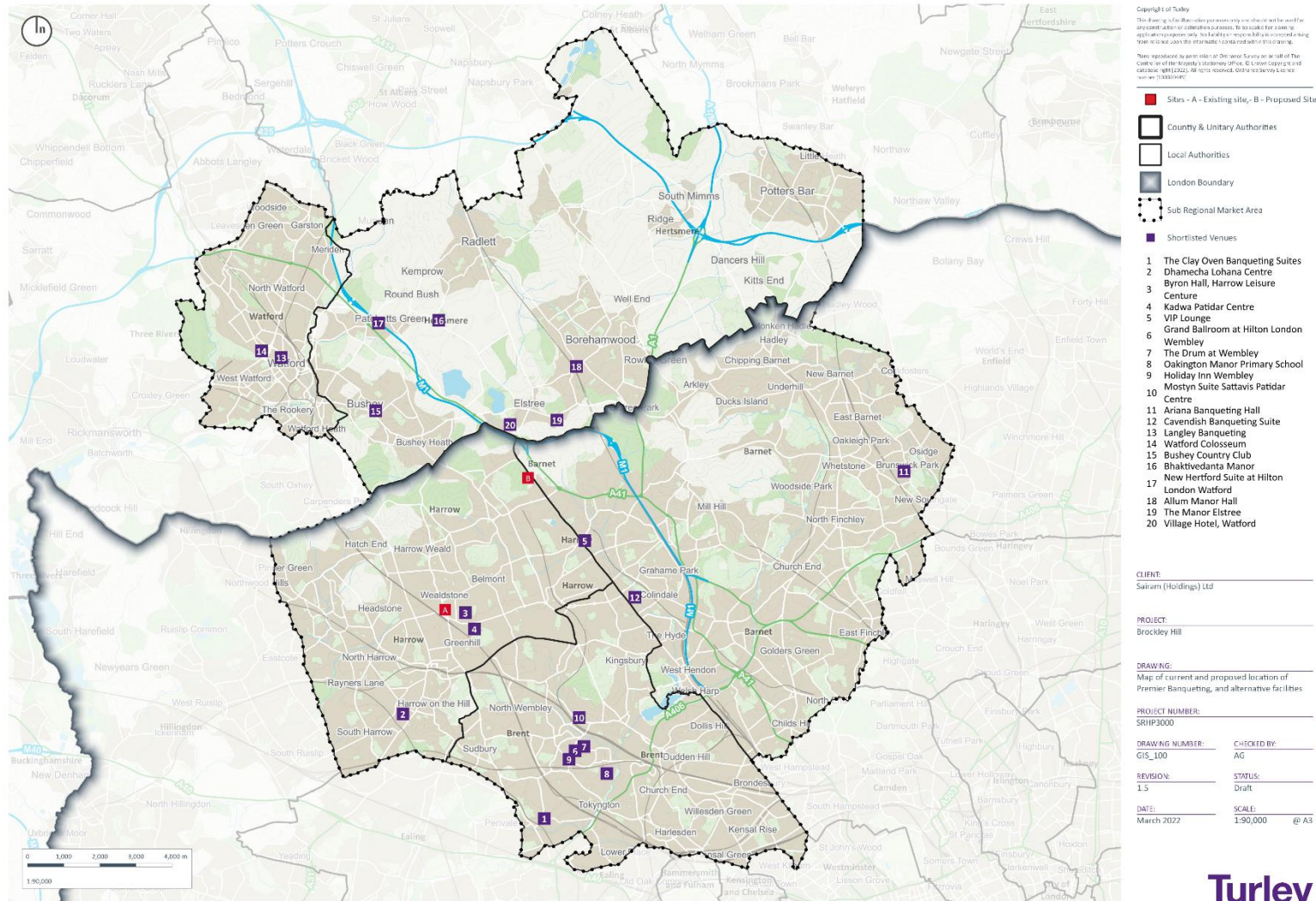
- 2 venues appear to meet these requirements but have recently closed including VIP Lounge in Harrow (permanent closure) and Watford Colosseum in Watford (temporary closure for refurbishment).
- Turley Economics and Premier Banqueting undertook a survey of couples who placed enquiries but did not hold their event at the venue. A total of 113 responses were received up to the end of 3 May 2022.
 - Of these, 95 indicated Harrow was their preferred location.
 - However, only 15 held their event in Harrow (at VIP Lounge, which is now closed), only 27 in the sub-regional market area and only 52 in London.
 - Over one third (36%) held their event between 100km and 300km from their preferred location of Harrow.

36. We identified 30 venues available in the sub-regional area. The full list is contained within the Appendix. Our survey of what is considered to be important (see subsequent sections) highlighted that price and size as well as location (including proximity to friends and family) are key considerations for those couples seeking venues⁸.
37. Applying a minimum size threshold of 300 guests and those located within the boroughs identified as forming the sub-regional area, **there are a total of 20 venues considered for further analysis.**
38. Map 6 below shows the location of the 20 alternative venues identified with capacity to host events with over 300 guests.

⁸ It is not possible to directly review price due to a range of pricing options being available and ultimately determined by the choices made by couples for their event.

Map 6: Potential alternative facilities identified

Source: HGH, Turley Economics (2022)



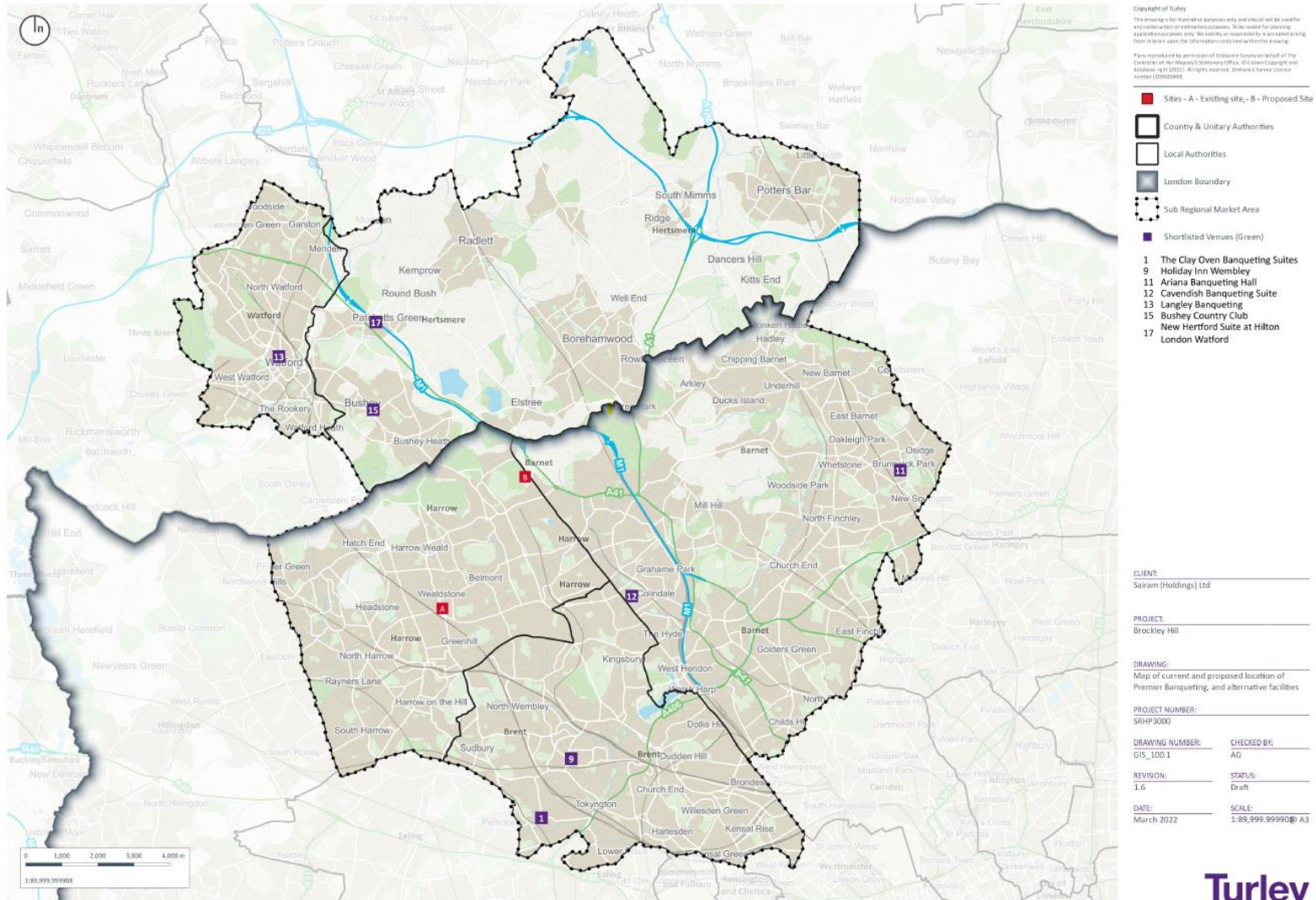
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39. We applied a further sifting process of these shortlisted 20 venues based on the following criteria which we understand to be important within the ethnic wedding market:
- Ability to have a stage (Mandap) for Hindu ceremonies
 - Catering for dietary requirements including Halal and vegetarian
 - Providing a package of services
 - Ability to offer gender segregated events
40. Internet searches and follow up phone calls were used to compile this information. The list of venues is included in the Appendix.
41. This sifting exercise identified, based on the information able to be obtained:
- There are no comparable venues operating in London Borough of Harrow. The closure of Premier Banqueting means that there is now no venue of this type to host Asian and other ethnic weddings within the borough and support these important life events for Harrow's Asian, Hindu and Muslim communities.
 - There are 7 venues across the Sub Regional Market Area which positively meet the above requirements (i.e. they are geared towards catering for Asian and ethnic weddings). These are shown as green in the appended list. These 7 venues are shown in Map 7.
 - There are 9 venues which largely meet the above requirements (i.e. they are able to cater for Asian and ethnic weddings but stricter cultural or religious requirements may not be fully met) within the Sub Regional Market Area. These are shown as amber in the appended list.
 - There are 2 which do not appear to meet these requirements (i.e. they would not be able to adequately cater for Asian and ethnic weddings). These are shown as red in the appended list.
 - 2 venues (VIP Lounge and Watford Colosseum) appear to meet the above criteria but have recently closed. These are shown in white in the appended list.
 - VIP Lounge which has many of the same characteristics as Premier Banqueting is no longer operational at its Edgware site in London Borough of Harrow. Its closure means there are no comparable venues operating in the borough.
 - Information on the website for Watford Colosseum also states that it is currently closed as Watford Borough Council plans to undertake a major refurbishment and improvement programme of the venue ahead of reopening to the public. Other information does indicate it is geared to Asian weddings but we have not included it within our numbers or analysis due to lack of capacity information.

Map 7: Comparable Alternative Venues

Source: HGH, Turley Economics (2022)



Comparability with Alternative Venues

42. Premier Banqueting offers couples and families of ethnic minority groups a venue for religious and matrimonial functions and caters to the specific requirements of such large-scale events. This approach to meeting multicultural needs through the design and operation of facilities will be a key feature of the proposed development. It is therefore useful to understand the alternative venues used by couples who made enquiries to Premier Banqueting but did not hold their event there, as well as understand the key features they were seeking in a venue.
43. A survey of individuals who made enquiries with Premier Banqueting was undertaken by Turley and Premier Banqueting. This was sent out in April 2022 to 300 contacts who made enquiries to host their event at Premier Banqueting but ultimately held their event elsewhere. The survey results were analysed based on those received up to and including 3 May 2022. At this time, there were 113 responses.

Location

44. A total of 15 respondents held their event in Harrow and 27 in the Sub Regional Market Area. Over one third of survey respondents (39 respondents, 35%) held their event in North/West London.
45. Of the remaining events Birmingham (including Walsall, Wolverhampton, West Bromwich and Dudley) hosted the next largest number of respondents (17) and East London (broadly comparable with an East London subregion using demographic data) hosted 9. Other locations include the Luton/Watford area to the north of the Greater London area, as well as Bolton, Manchester and Sheffield. See Table 3.

Table 3: Location of Event

Location	Number of Respondents
Harrow	15
Sub-regional market area	27
North / West London	39
East London	9
Elsewhere in London	4
Luton	5
Watford	5
Elsewhere in the Eastern Region (including Hertfordshire)	4
South East region (including Gatwick, Kent, and Buckinghamshire)	4
Northampton	2
Coventry	2
Birmingham (including Walsall, Wolverhampton, West Bromwich and Dudley)	17
Leicester	4

Nottingham	1
Sheffield	5
Bolton	5
Manchester	4
Bradford/Leeds	2
<i>Total**</i>	<i>112*</i>
<i>... of which, in London</i>	<i>52</i>
<i>...of which, outside London</i>	<i>60</i>

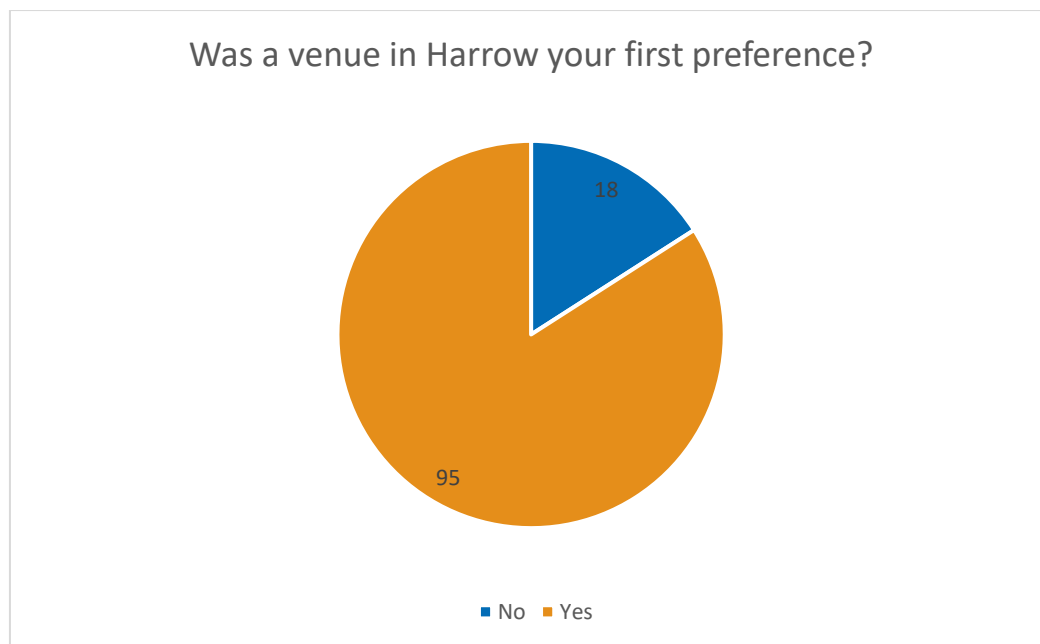
Source: Survey May 2022

* one survey respondent did not specify location

**Table does not sum as not all geographies are mutually exclusive

46. For the majority of respondents (95 or 84% of all respondents) a venue in Harrow was the first preference. See Figure 7.

Figure 7: Locational Preference



Source: Survey May 2022

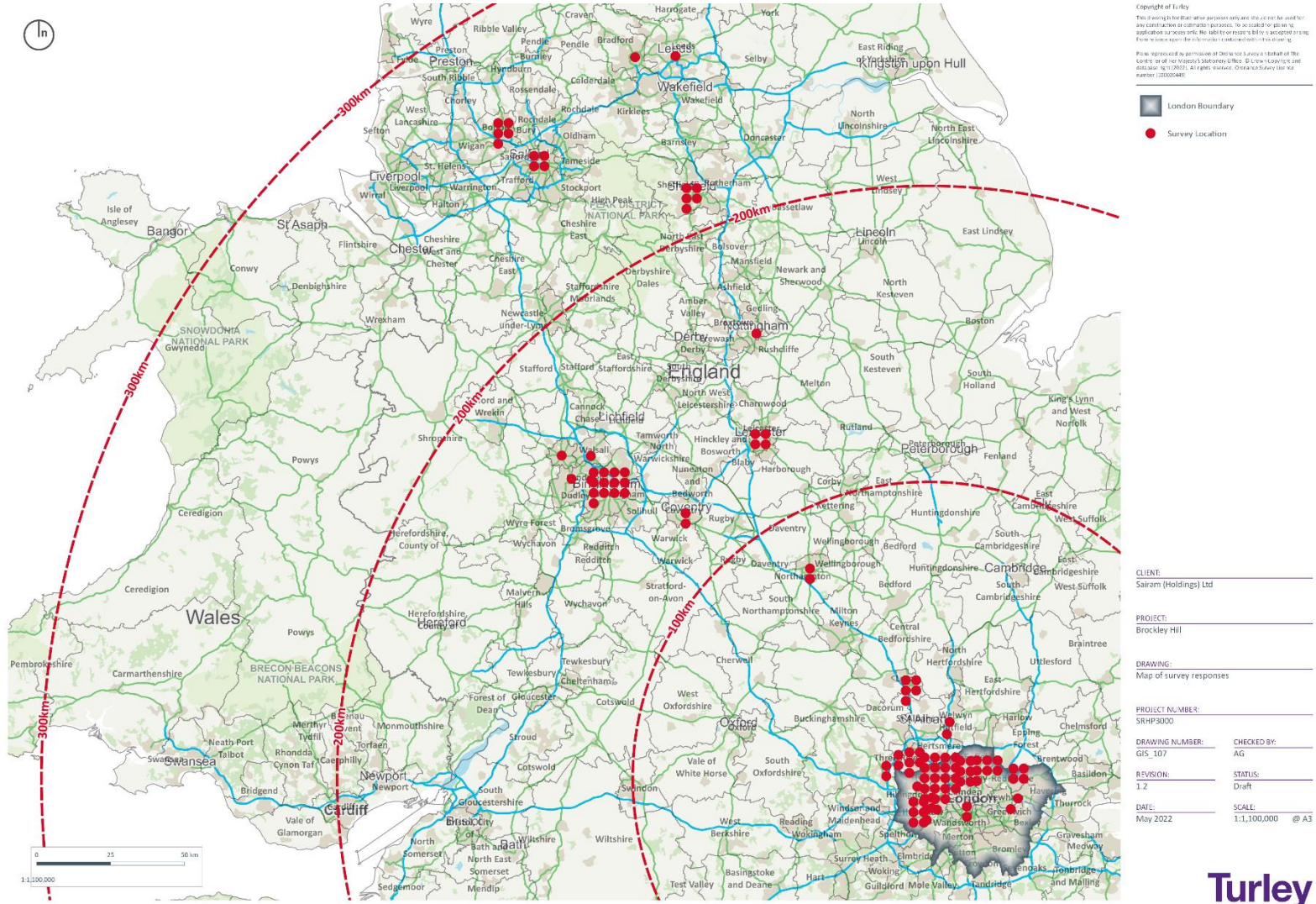
47. However, only 15 held their event in the borough of Harrow (at VIP Lounge, which is now closed), only 27 in the sub-regional market area⁹ and only 52 in London.
48. Of the 112 respondents who disclosed the location their events were held, over one third (40) held their event between 100km and 300km from their preferred location. The following maps (Maps 8 and 9) demonstrate this. Of note, VIP Lounge in Edgware is now closed¹⁰. The venue's website suggests it was a comparable venue to Premier Banqueting, specifically geared to host Asian and ethnic weddings.

⁹ All 27 events in the sub-regional market area were held at venues identified in the Alternative Venues search: VIP Lounge, Cavendish Banqueting Suite, Ariana Banqueting Hall, and Langley Banqueting and Conference Centre.

¹⁰ Clarified by pre-recorded voicemail message on 19/04/2022

Map 8: Venues Used by Survey Respondents

Source: Survey responses as of 3 May 2022, Turley Economics (2022)



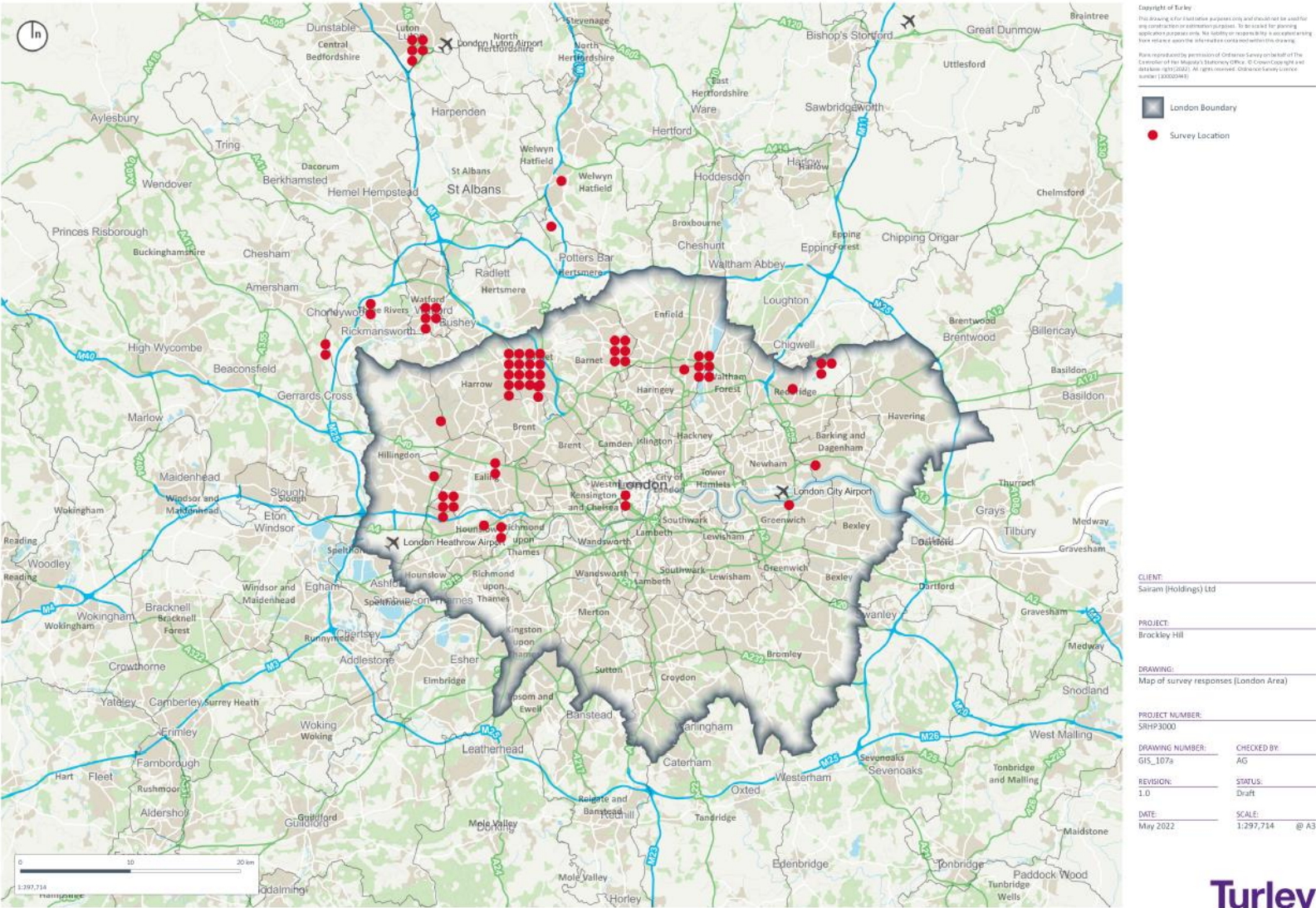
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Map 9: Venues Used by Survey Respondents – London Focus

Source: Survey responses as of 3 May 2022, Turley Economics (2022)



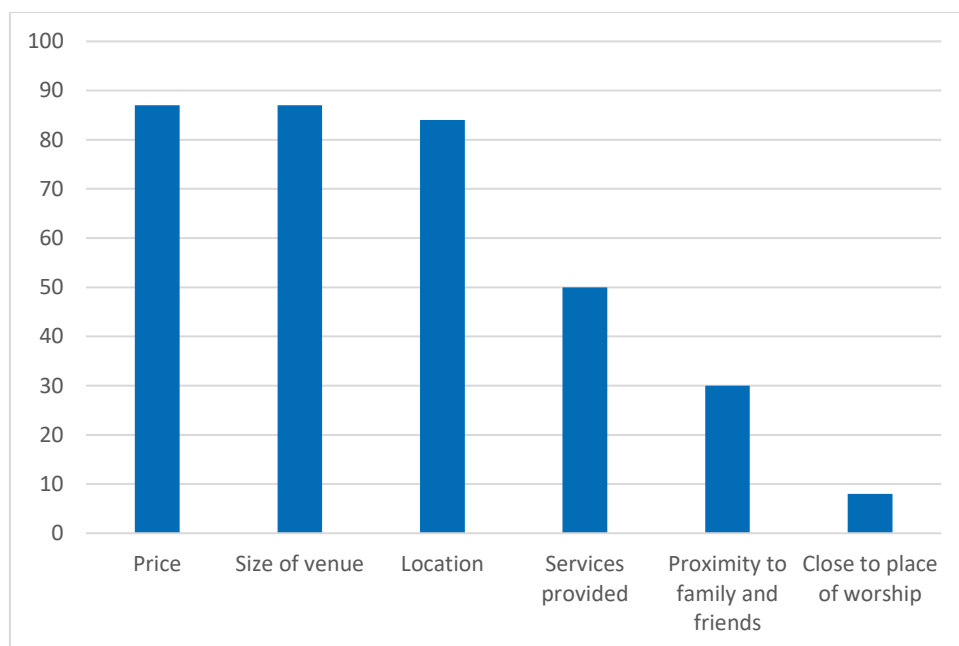
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Reasons for considering Premier Banqueting

49. Premier Banqueting is viewed especially favourably in terms of price (87 responses, 77.0%), size (87 responses, 77.0%), location (84 responses, 74.3%). Services provided (50 responses, 44.2%) and proximity to family and friends (30 or 26.5%) are also considered important.
50. Proximity to place of worship (8 responses, 7.1%) is considered less important though still a reason for some respondents in considering the venue. See Figure 8.

Figure 8: Reasons for Considering Premier Banqueting (Number of Respondents)



Source: Survey May 2022

Range of economic benefits associated with the proposed development

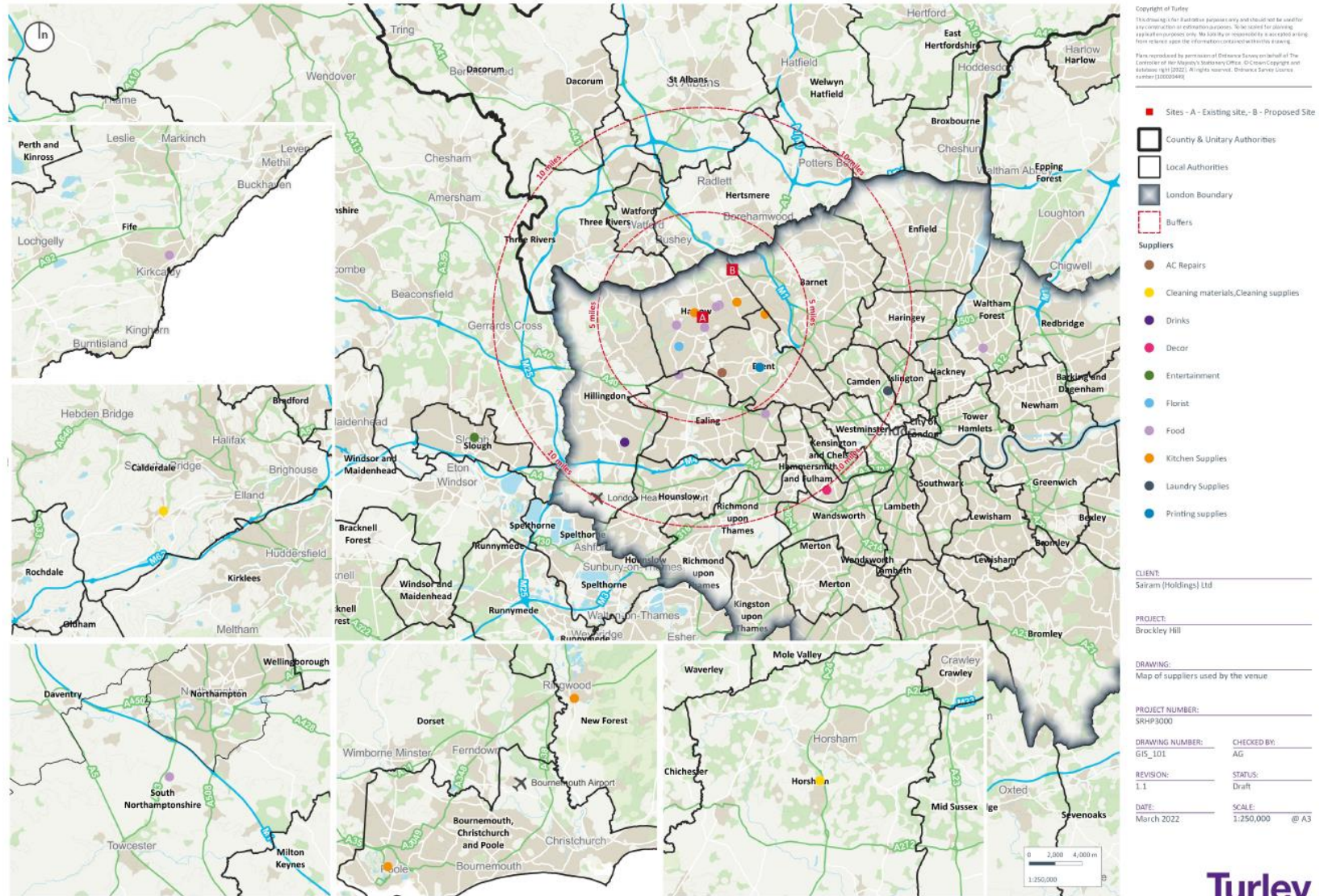
Key points:

- Premier Banqueting's most significant economic impact is generated through indirect economic benefits associated with local and wider supply chain expenditure. This is in the context of the above average level of expenditure on Asian weddings compared to those in the UK as a whole (see earlier in paper). This in turn may be capable of supporting significant levels of employment in supply chain businesses.
- The wider supply chain includes suppliers of Premier Banqueting, of which 8 are located in London Borough of Harrow, as well as expenditure of host couples and event guests. This may include hotel stays, leisure, food and beverage spend, wedding attire and travel costs.
- Additional benefits will include jobs and economic productivity supported through the construction and operation of the banqueting facility as well as Business Rates.

51. The operation of the event venue generates a range of economic benefits which will be modelled (where information allows) and presented. Drawing on consultation with the Appellant, together with information provided by the Appellant, the main economic benefits are as follows:
- Supply chains (Indirect expenditure and benefits) – Premier Banqueting provides catering and alcohol in-house and sources these from various suppliers. Whilst entertainment and decorations are typically chosen by couples and families, Premier Banqueting works with a number of suppliers that can be recommended to couples and families. Map 10 below shows the location of the supplier businesses that Premier Banqueting typically rely on for functions and for everyday operation of the venue. Of these, 8 (32%) are within Harrow and 18 (72%) are within London (inclusive of Harrow). This shows a degree of localisation within the supply chain which is positive.
 - Expenditure and other economic benefits associated with guests attending events could be a significant additional source of economic benefit (Induced benefits) for Harrow and the wider sub-regional market area. Types of expenditure might include that spent by guests on travel, accommodation, shopping, leisure and food and beverage purchases.
52. The operation of the new banqueting facility will also generate benefits in terms of:
- Employment – including direct employment and agency staff to cater for large events
 - Economic productivity (Gross Value Added)
 - Business Rates
53. Social benefits will arise from provision of employment opportunities to young people to gain experience in the workplace.
54. In addition to the ongoing benefits associated with operation of the proposed development there will be temporary construction related benefits which can be quantified and valued as part of a full economic impact assessment.

Map 10: Location of supplier Premier Banqueting suppliers

Source: Premier Banqueting Ltd.



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Glossary

Mehndi is a pre-wedding ritual that is mostly celebrated and hosted by the bride and her family a couple of days before the main wedding ceremony. The mehndi is celebrated by both Hindu and Muslim families with music and dancing. The bride and her female friends and relatives apply turmeric paste/henna on the bride's hands, feet and face. The Mehndi signifies the love during marriage and the bride is considered fortunate if she retains the colour of the henna for a long time signifying the love she will receive from her husband.

The **sangeet** ceremony is also a pre-wedding tradition which is performed after the Mehndi ceremony and a few days before the actual wedding. Traditionally the sangeet only used to be an event held for north Indian weddings, but the sangeet is now celebrated by south Indian couples and in Bengali marriages also. Families from both the groom and the bride's side meet each other, sing and dance. The songs comprise meaningful lyrics which describe the family members and their natures and tell the importance of marriage in life.

Haldi ceremony takes place in Hindu weddings where family members put turmeric paste all over the bride and groom's skin and clothes. Relatives and family members show their blessings as they apply haldi. This is believed to make their skin glow for the wedding which is held later that day.

Roka ceremony is one of the first official wedding events in a Hindu wedding and is considered the first step towards the marriage. Both families come together to bless the couple and show their approval and consent for the union. Gifts and sweets are exchanged and the families spend time to get to know each other better.

Nikah is the Islamic marriage ceremony and consists of readings from the Qur-an and the exchange of vows in front of witnesses for both partners. An imam is often present and performs the ceremony and gives a short sermon. The men sit around the groom and the women sit around the bride. The bride's father is the Wali of the bride and the groom's family offers Mehr to seek her consent. Prayers from the Qu-ran are recited. The Nikah is followed by a Nikah Nama which is the official marriage contract where the duties of the groom and the bride are recited in the presence of witnesses. After the official marriage is signed, a Khutba is recited and the elders perform a blessing. The Nikah can be intimate with only close members of family and friends but can also be a large scale event with food served.

Walima is the public declaration that the marriage is complete and is the reception party. The bride and groom are treated royally and the bride is introduced to the members of the groom's extended family, relatives, and friends. There are gifts, lavish food, fun and dancing. This may feature traditional symbols of fertility and plenty such as fish, chicken, rice and candy-covered almonds.

Appendix A – Alternative Venues in Sub-Regional Market Area

Venues able to accommodate minimum of 300 guests

Green = venue is geared towards catering for Asian and ethnic weddings

Amber = venue is able to cater for Asian and ethnic weddings but stricter cultural or religious requirements may not be fully met

Red = venue would not be able to adequately cater for Asian and ethnic weddings

* = dry hire venue only

Venue Name	Venue Address	Venue Postcode	Borough	Maximum Guest Capacity
Kadwa Patidar Centre*	Kadwa Patidar Centre Kenmore Avenue Harrow HA3 8LU	HA3 8LU	Harrow	750
Byron Hall, Harrow Leisure Centre	Harrow Leisure Centre Christchurch Avenue Harrow HA3 5BD	HA3 5BD	Harrow	1800 (dining for up to 800)
Dhamecha Lohana Centre	Dhamecha Lohana Centre Brember Road South Harrow HA2 8AX	HA2 8AX	Harrow	400
The Drum at Wembley*	The Drum Wembley, HA9 0FJ	HA 9 0FJ	Brent	Guests for a ceremony:700 Guests for sit down meal:100 - 450 Guests for buffet / cocktails:750
Cavendish Banqueting Suite	Edgware Road (opp Mercedes Benz) Colindale, London, NW9 5AE	NW9 5AE	Barnet	400
Mostyn Suite Sattavis Patidar Centre*	Sattavis Patidar Centre Forty Avenue, J/w The Avenue Wembley Park , Middlesex , HA9 9PE	HA9 9PE	Brent	450

Ariana Banqueting Hall	North London Business Park, Oakleigh Rd South/Brunswick Park Road, London, N11 1GN	N11 1GN	Barnet	800
The Clay Oven Banqueting Suites	THE BANQUETING SUITES 197 Ealing Road, Wembley, Middlesex, HA0 4LW	HA0 4LW	Brent	Suite 1 - 500 Suite 2 - 300
Oakington Manor Primary School*	Oakington Manor Drive Wembley, Middlesex, HA9 6NF	HA9 6NF	Brent	300
VIP Lounge (closed)	47 High Street, Edgware HA8 7DD	HA8 7DD	Harrow	
New Hertford Suite at Hilton London Watford	Elton Way Watford Hertfordshire WD25 8HA	WD25 8HA	Watford	350
Village Hotel, Watford	Centennial Park, 419 - 420 Centennial Ave Elstree Borehamwood Hertfordshire WD6 3SB	WD6 3SB	Hertsmere	300
The Manor Elstree	Barnet Lane Elstree Borehamwood Hertfordshire WD6 3RE	WD6 3RE	Hertsmere	450 in marquee

Holiday Inn Wembley	Empire Way Wembley Greater London HA9 8DS	HA9 8DS	Brent	500
Langley Banqueting	Gade House 38-42 The Parade High Street, Watford WD17 1AZ	WD17 1AZ	Watford	1,400
Watford Colosseum (temporarily closed)	Watford Colosseum Rickmansworth Road Watford WD17 3JN	WD17 3JN	Watford	
Bushey Country Club	High Street, Bushey, WD23 1TT	WD23 1TT	Hertsmere	600
Bhaktivedanta Manor	Bhaktivedanta Manor, Dharam Marg, Radlett, Watford WD25 8EZ	WD25 8EZ	Hertsmere	300+
Allum Manor Hall*	2 Allum Ln, Elstree, Borehamwood WD6 3PJ	WD6 3PJ	Hertsmere	470
Grand Ballroom at Hilton London Wembley	Lakeside Way Wembley Greater London HA9 0BU	HA9 0BU	Brent	550

Additional Venues Discounted due to Guest Capacity below 300

The Great Barn	The Great Barn Headstone Manor Harrow HA2 6PX	HA2 6PX	Harrow	200
Stanmore Golf Club	29 Gordon Avenue Stanmore HA7 2RL	HA7 2RL	Harrow	150
Golden Sip	500 Northolt Road South Harrow Harrow HA2 8HA	HA2 8HA	Harrow	175

Kenton Sports Club	Kenton Park Road Kenton Harrow HA3 8UB	HA3 8UB	Harrow	110 (65 if seated)
Blackwell Hall	90 Uxbridge Road Road Stanmore Harrow HA3 6DQ	HA3 6DQ	Harrow	150 (94 if seated)
Beacon Centre	9 Scott Crescent Harrow HA2 0TY	HA2 0TY	Harrow	200
Mercure London Watford	Watford By-Pass Watford Hertfordshire WD25 8JH	WD25 8JH	Watford	200
Moor Park Golf Club	Moor Park Rickmansworth Hertfordshire WD3 1QN	WD3 1QN	Watford	250
DoubleTree by Hilton London Elstree	Barnet By-Pass Elstree Borehamwood Hertfordshire WD6 5PU	WD6 5PU	Hertsmere	260

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23 May 2022

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