Putting the Community First

BARNET
LONDON BOROUGH

New Barnet Town Centre Framework

Scoping Report Appendices

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Appendix A – Policy Review

A.1 The Purpose of this section is to provide an overview of the planning and corporate policy framework that should underpin the provisions of the framework document. The extent and structure of this is illustrated in Figure A.1, below:

Figure A.1 Policy Framework

National
PPS1: Delivering Sustainable Development (2005)
Supplement to PPS1: Planning for Climate Change (2007)
PPS6: Planning for Town Centres (2005)
PPS12: Local Spatial Planning (2008)
PPG13: Transport (2001)
(DRAFT PPS4: Planning for Prosperity (2009))

Regional
London Plan (2008)
North London Sub-regional Development Framework (2006)
(London Plan Review (2009))
(Sustainable Design and Construction SPG (2005))
(Accessible London: Achieving an Inclusive Environment (2004))

Local
Barnet UDP (2006)
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Barnet Sustainable Community Strategy (2006-16)
Barnet Vibrant and Viable Town Centres: A Suburban Town Centres Strategy for Barnet (2008)
The Three Strands Approach (2005)
Barnet Corporate Plan (2008/9 – 2011/12)

National

A.2 National planning policy is laid down in a series of Planning Policy Guidance notes (PPGs) and Planning Policy Statements (PPSs) which are material considerations in the formulation of Development Plans and in the determination of planning applications. The 'core' documents of greatest relevance to the preparation of the NBTCF are PPS12, PPS1, PPS6, and PPG13 which are considered below:

PPS1: Delivering Sustainable Communities (2005)

A.3 PPS1: Delivering Sustainable Development (2005) sets out the Government's objectives for the planning system and states that sustainable development is the core principle underpinning planning (and therefore the core principle that should underpin the NBTCF). It requires planning authorities to promote urban regeneration and bring forward sufficient land of a suitable quality in appropriate locations to meet the expected needs for housing, industrial, retail, and leisure development, and for leisure/recreation uses – taking into account issues such as accessibility and sustainable transport needs and the provision of essential infrastructure. It requires planning to actively bring vacant and underused previously developed land and buildings back into beneficial use and promotes the creation of inclusive, safe and healthy communities.

Planning and Climate Changes: Supplement to PPS1 (2007)

A.4 Supplement to PPS1: Planning and Climate Change (2007) stresses the principle that tackling climate change is a key government priority for the planning system and provides further information to PPS1 particularly with respect to the generation of renewable and low-carbon energy; decentralised energy generation (to supply new development); and requirements for sustainable buildings.

PPS6: Planning for Town Centres (2005)

A.5 PPS6 reaffirms the Government's commitment to protecting/sustaining town centres. The central objective of the guidance is to promote the vitality and viability of town centres by planning for the growth of existing centres by promoting them as the focus for new development and encouraging a wide range of services in a high quality environment that is accessible to all. Further Government objectives include the enhancement of genuine consumer choice to meet the needs of the entire community; supporting an efficient, competitive and innovative retail sector; and improving accessibility to town centres.

A.6 Through Local Development Documents, PPS6 requires local planning authorities to implement the Government's objectives for town centres by planning positively for their growth and development, and should therefore develop a hierarchy and network of centres; assess the need for further main town centre uses and ensure there is the capacity to accommodate them; focus development in and plan for the expansion of existing centres as appropriate (at the local level appropriate sites should be identified in development plan documents); and promote town centre management (including the creation of partnerships to develop, improve and maintain the town centre and manage the evening and late-night economy). PPS6 clearly states that it is not the role of the planning system to restrict competition, preserve existing interests or to prevent innovation.

A.7 The plan-led approach promoted by PPS6 encourages local authorities to actively promote growth and manage change in town centres and adopt a proactive, plan-led approach to planning for town centres through regional and local planning. Local authorities should use tools such as area action plans, compulsory purchase orders, and town centre strategies in order to address the transport, land assembly, crime prevention, planning and design issues associated with the growth and management of centres. PPS6 advises LPA's to plan for growth in their development plan documents by selecting appropriate existing centres to accommodate identified need for growth (by making better use of existing land and buildings, including redevelopment and where necessary by extending the centre); managing the role and function of existing centres (for example, promoting and developing a specialist or new role and encouraging specific types of use in some centres); and by planning for new centres (where appropriate).

A.8 Growth should be accommodated by more efficient use of land and buildings within existing centres where possible, and local authorities should aim to increase the density of development, where appropriate. Opportunities within centres should be identified for sites suitable for development or redevelopment or where conversions and changes of use will be encouraged for specific buildings or areas – the number and size of sites identified should be sufficient to meet the scale and type of need identified. Where growth cannot be accommodated in identified existing centres, LPA's should plan for the extension of the primary shopping area/town centre which should be carefully integrated with the existing centre both in terms of design and pedestrian access. PPS6 requires provision to be made for larger format stores (where a need has been identified) and should make provision for them in this context.

A.9 Where existing centres are in decline, LPA's should assess the scope for consolidating and strengthening these centres by seeking to focus a wider range of services there, promote the diversification of uses and improve the environment. Where reversing decline is not possible, local planning authorities should recognise that these centres may need to be reclassified in the hierarchy of centres and reflect this revised status in policies applied to the area – this may include allowing retail units to change to other uses.

A.10 PPS6 requires LPA's to adopt a positive and proactive approach to planning for the future of all types of centres within their areas. The Core Strategy should set out a spatial vision and strategy for the network and hierarchy (and different roles) of centres within their area. LPA's should:

- Assess the need for new floorspace for town centre uses;

- Identify deficiencies in provision, assess the capacity of existing centres to accommodate new development, including, where appropriate, the scope for extending the primary shopping area and/or town centre, and identify centres in decline where change needs to be managed;
- Identify the centres where development will be focussed (including new centres), and develop strategies for developing and strengthening centres within their area;
- Define the extent of the primary shopping area and the town centre;
- Review existing allocations, reallocate site and identify/allocate new sites;
- Develop spatial policies to promote investment in deprived areas by identifying/strengthening opportunities for growth of existing centres; and
- Set out criteria based policies for assessing and locating new development proposals.

A.11 In addition to defining the extent of the primary shopping area, LPA's may distinguish between primary and secondary frontages – primary frontages should contain a high proportion of retail uses, while secondary frontages provide greater opportunities for flexibility and a diversity of uses. Town centre policies should promote high quality and inclusive design, in order to improve the character and quality of the area in which such development is located and the way it functions. To ensure the effective and efficient use of land in town centres, policies should encourage well designed higher-density multi-storey development (where appropriate), including the promotion of mixed use development (including housing and office uses above ground floor). LPA's should also encourage the diversification of complementary uses, including night-time economy uses. PPS6 also recognises the role that street markets can make to vitality and viability, and encourages LPA's to consider creating new markets as part of an integral vision for their centres.

A.12 In selecting sites for development and assessing development proposals, LPA's should assess the need for development; consider/identify the appropriate scale of development; apply the sequential approach to site selection; assess the impact of development on existing centres; and ensure that locations are accessible are accessible and well served by a choice of means of transport. After considering these factors, LPA's should consider the degree to which other considerations such as physical regeneration, employment, economic growth and social inclusion are relevant.

A.13 LPA's are encouraged to work closely with business, including retail/leisure operators, developers, stakeholders and the community in identifying sites for development. Flexibility/realism is expected from all parties in the planning process where LPA's should have regard to the site requirements of a range of business models, and developers should be prepared to be innovative and flexible in considering the possibility of fitting development onto more central sites.

PPS12: Local Spatial Planning (2008)

A.14 PPS12: Local Spatial Planning sets out Government policy on the preparation of Local Development Frameworks. It sets out what the key ingredients of local spatial plans are and the key government policies on how they should be prepared – it should be taken into account by LPA's in preparing Development Plan Documents (DPD's) and other Local Development Documents (LDD's) (such as the NBTCF).

A.15 Key points of most relevance to the NBTCF are as follows:

- It stresses the role of local authorities as being 'place shapers', who should discharge their role through partnership with the public, private and voluntary sectors and with the direct input of their communities; and
- The process of local spatial planning should involve producing a vision for the future of places (that responds to local challenges and opportunities, a sound evidence base, a sense of local distinctiveness, and community derived objectives – within the overall framework of national policy and regional strategies). This should translate into a set of priorities, programmes, policies and land allocations which will create a positive framework for investment, regeneration and action on climate change, and contribute to the achievement of sustainable development.

PPG 13: Transport (2001)

A.16 PPG13 requires new developments to create places that connect with each other sustainably by providing the right conditions to encourage walking, cycling, and the use of public transport – the principle that people should come before traffic is noted. It requires the needs and safety of all in the community (particularly including disabled people) to be considered, taking account of the importance of good design, and requires high-trip generating landuses to be located in City, Town and District centres, so as to maximise their accessibility by public transport, walking and cycling. Local authorities should seek to make the maximum use of the most accessible sites (such as those in town centres) and should be proactive in promoting intensive development on these sites (through the preparation of site briefs and where appropriate consider using compulsory purchase to bring forward development. The specific principle that town centres should be the preferred locations for retail development is reinforced, and local authorities are encouraged to promote urban renaissance and to reinforce the existing role of town and district centres.

Further National Planning Policy Guidance

A.17 The key national planning guidance of greatest relevance to the NBTCF has been considered above, however regard should also be had to the provisions of the following in preparing the Framework:

- PPS3: Housing (2006) – sets out the Government's planning polices on housing. It requires a development to make the optimum reuse of sustainable brownfield sites that are proven to be available, suitable and viable;
- PPG4: Industrial, Commercial Development and Small Firms (1994) – provides guidance on the location of new business developments and seeks to assist small firms through the planning system;
- PPS9: Biodiversity and Geological Conservation (2005) – requires that the potential impacts of planning decisions on biodiversity and geological conservation are fully considered and where necessary appropriate mitigation measures are put in place;
- PPS10: Planning for Sustainable Waste Management (2005) – forms part of the UK National Waste Management Plan. It aims to help deliver sustainable development through increasing the priority given to waste management and by seeking to ensure that the design and layout of new development supports sustainable waste management;
- PPS22: Renewable Energy (2004) – promotes the use of renewable forms of energy in developments. RSSs and LDDs should promote and encourage development of renewable energy sources, and requires that the environmental and economic benefits of renewable energy proposals should be material considerations in determining the grant of planning permission;
- PPS23: Planning and Pollution Control (2004) – requires that the potential for contamination is properly assessed and that developments should incorporate any necessary remediation and subsequent management measures to deal with unacceptable risks in order to secure the beneficial re-use of land; and
- PPS25: Development and Flood Risk (2006) – seeks to ensure that new development is located in areas where the potential risk of flooding can be managed and that adequate drainage infrastructure is available.

Consultation Drafts

Consultation Draft PPS4: Planning for Prosperous Economies (2009)

A.18 Draft PPS4 was released for consultation in May 2009 alongside the Good Practice Guide on Need, impact, and the Sequential Approach. Draft PPS4 sets out revised Government policy on town centres and retailing together with policies on economic development in urban and rural areas previously set out in PPG4, PPG5, PPS6 and PPS7. As drafts, limited weight should be given to these documents at this stage, however a summary of the key points of most relevance to the NBTCF are considered below:

- The sequential test (town-centres first) policy is reiterated;
- The 'need' test for the determination of planning applications set out in PPS6 is removed (but is retained as part of the plan preparation process);
- A revised (more comprehensive) 'impact' is introduced for the determination of planning applications, set around 8 'key' impacts (climate change, spatial planning strategy, investment, appropriate scale, accessibility, trade/turnover, vitality/viability, and design). Applications for development should generally be refused if the proposal would lead to a significant adverse impact against any of the 'key' impact tests, unless they are outweighed by significant economic, social and environmental benefits;
- Much greater emphasis is placed on climate change, with the inclusion of a requirement to demonstrate the planning application proposals have been designed to limit carbon dioxide emissions and minimise effects on climate change;
- A requirement for local authorities to proactively plan for consumer choice is introduced (but no competition test), which should promote competitive town centres and recognise the role of smaller shops and markets; and
- As part of the plan-making process local authorities will be required to identify deficiencies in floorspace provision (including convenience shopping and other facilities that serve day-to-day needs); define a network of lower order centres and establish a strategy for their management and growth; consider setting thresholds for the maximum scale of edge and out of centre retail development proposals which would require a full impact assessment; and to prepare policies setting out the appropriate scale of development likely to be permissible in different centres.

Further Guidance

Circular 05/05 – Planning Obligations

A.19 The Secretary of State's policy requirements for planning obligations are set out in Circular 05/05 which provides guidance to local authorities on the use of such obligations under s.106 of the Town and Country Planning Act 1990. The Circular requires that where planning obligations are sought they should meet all of the following tests:

i. Relevant to planning;
ii. Necessary to make the proposed development acceptable in planning terms
iii. Directly related to the proposed development;
iv. Fairly and reasonably related in scale and kind to the proposed development; and
v. Reasonable in all other respects.

A.20 Further key points of particular relevance are summarised below:

- **Paragraph B6** states that the use of planning obligations must be governed by the fundamental principle that planning permission may not be bought or sold;
- **Paragraph B7** states that planning obligations should never be used as a means of securing for the local community a share in the profits of development (i.e. as a means of securing a 'betterment levy');
- **Paragraph B8** establishes the principle that development plan policies are a crucial pre-determinant in justifying the seeking of planning obligations, as these are agreed to be essential in order for development to proceed;
- **Paragraph B9** states that planning obligations should not be used solely to resolve existing deficiencies in infrastructure provision or to secure contributions to the achievement of wider planning objectives that are not necessary to allow consent to be given for a particular development; and
- **Paragraph B31** states that it is important that the negotiation of planning obligations does not unnecessarily delay the planning process.

Planning Control of Mezzanine and Other Internal Floorspace Additions, ODPM, 2005

A.21 The creation of additional floorspace within buildings was brought under planning control in May 2006 following consultation on the above report. This was in response to concerns that the development of mezzanine floors in large out-of-centre retail stores significantly increased the available floorspace, thereby undermining the objectives of planning policy for the regeneration of town centres. The provision, incorporated into the 2004 Planning Act does not seek to prevent such development, but to allow authorities to determine such proposals in the same way they would for external store expansion.

Changes to the Use Classes Order, 2005

A.22 Changes to the Use Classes Order took effect on 21^{st} April 2005, enabling local authorities to have more control over managing town centre development while minimising the proliferation of pubs, takeaways and nightclubs. Café's and restaurants have retained their A2 classification, pubs and bars have been reclassified under a new Class A4, and takeaways have been reclassified under a new and separate Class A5. Nightclubs have been classified as Sui Generis.

Competition Committee: The Supply of Groceries in the UK Market Investigation (2008)

A.23 On 30th April 2008, the Competition Commission published the final report on its proposals to remedy competition issues in the UK grocery market. The report recommended the introduction of a 'competition test' in planning decisions on proposed new grocery stores and extensions which would have favoured new entrants and grocery retailers over those which already possessed a portion of the local market share. The Office of Fair Trading (OFT) would also have been incorporated as a statutory consultee on all applications for grocery retail stores proposing a net sales area in excess of 1,000 sqm and retailers would have been required to notify the OFT of any acquisitions of grocery stores with a net sales area greater than 1,000sqm. The report also identified and released thirty restrictive covenants being used by retailers to restrict entry by competitors and recommended the prohibition of future imposition of such covenants. Grocery retailers would have also been required to relinquish control over sites in highly-concentrated markets that were identified as inhibiting entry by competing retailers. Finally, the report recommended the establishment of an independent ombudsman to oversee and enforce a tightened Supermarkets Code of Practice to ensure compliance of the new regulations.

A.24 In June 2008, Tesco lodged an appeal against the report, challenging the Commission's proposal to introduce a 'competition assessment' into the UK planning system. Tesco asked for a judicial review of the proposal, arguing that the new test was unnecessary and would simply add another hurdle to the planning approval process. In March 2009, the Competition Appeal Tribunal (CAT) upheld the complaint ruling that the Commission had failed to properly assess the implications of the proposed competition test. Responding to the decision, the Competition Commission has said the ruling did not "preclude the test being introduced in future" and a subsequent tribunal in April 2009 has allowed the commission six months to rethink its proposals to deal with the issues that led to Tesco's appeal being upheld.

Compulsory Purchase Legislation

A.25 Compulsory purchase legislation is set out in the Acquisition of Land act 1981 – powers are granted to local authorities via planning, housing or other local government legislation to compulsorily acquire land where it is for a specific purpose. These powers are an important tool available to local authorities to enable regeneration, where land ownership issues could otherwise prevent change.

Regional

London Plan (2008)

A.26 The London Plan is the spatial development strategy for Greater London setting out an integrated social, economic and environmental framework for future development over the next 15-20 years. It seeks to promote London as a World City and to maintain and enhance the competitiveness of business, including encouraging services, tourism, culture and the arts.

It promotes urban regeneration particularly in areas requiring physical improvement, the enhancement of employment opportunities and seeks to maximise housing provision and to facilitate the development of efficient transport systems.

Key Policies

A.27 The principal London Plan policies relating to town centres are considered below:

A.28 The Plan adopts a policy of 'structured choice', which concentrates the supply of retail and leisure facilities and services in the most accessible places and spreads them between central London, town centres and development areas. **Policy 3D.1** states that Boroughs should enhance access to goods and services and strengthen the wider role of town centres to:

- Encourage retail, leisure and other related uses in town centres and discourage them outside the town centres;
- Improve access to town centres by public transport, cycling and walking;
- Enhance the quality of retail and other consumer services in town centres;
- Designate core areas primarily for shopping uses and secondary areas for shopping and other uses; and
- Undertake regular town centre health-checks.

A.29 The London Plan recognises that London has a complex network of town centres, and five broad types have been identified: international, metropolitan, major, district, local, and neighbourhood. It indicates that District Centres (including New Barnet) have traditionally provided convenience goods and services for more local communities to meet their day-to-day needs, and that developing the capacity of district centres for convenience shopping is critical to ensure access to goods and services at the local level, particularly for people without access to cars.

A.30 The London Boroughs are split into sub-regions; the London Borough of Barnet is defined within the North London sub-region along with Enfield, Haringey and Waltham Forest. One of the strategic priorities for the North London sub-region is to promote and intensify retailing, services, employment, leisure and housing in town centres and opportunities for mixed-use development. The plan states that strategically designated town centres in the North London sub-region should be considered as opportunities for more intensive development and Boroughs should consider how their roles could be consolidated or enhanced to meet retail and other consumer needs and to increase capacity for mixed-use development including housing.

A.31 In accordance with national planning policy guidance, **Policy 3D.2** states that UDP policies should assess retail capacity and need, and where need for additional development is established, capacity to accommodate such development should be identified within the UDP following a sequential approach. The Policy goes on to state that the scale of development should relate to the size and role of the centre and its catchment. **Policy 3D.3** recommends that Boroughs should work with retailers and others to prevent the loss of retail facilities that provide essential convenience and specialist shopping.

Further Policies

A.32 In addition to the key retail/town centre policies outlined above, the Framework should also have regard to the raft of further policies set out in the London Plan including those relating to housing, energy/climate change, urban design and accessibility.

North London Sub-regional Development Framework (2006)

A.33 The North London Sub-regional Development Framework (2006) provides further non-statutory guidance on the implementation of London Plan policies at the sub-regional level. It makes specific reference to North London's network of town centres which are highlighted as key locations for growth which should be co-ordinated on a sub-regional basis to ensure that each centre plays to its strengths and complements the role of others. The focus of the strategy for town centres is on sustainable growth.

Supplementary Planning Guidance

Sustainable Design and Construction (2005)

A.34 The Mayor's Sustainable Design and Construction SPD (2005) provides further guidance on the implementation of London Plan (2004) Policy 4B.6 (now superseded by policies in the 2008 London Plan).

Accessible London: Achieving an Inclusive Environment (2004)

A.35 The Mayor's Accessible London SPG (2004) provides further guidance on the implementation of London Plan policies relating to inclusive access (focussed on access for wheelchair users) to the built environment.

Local

Barnet UDP (2006)

A.36 The Barnet UDP was adopted in May 2006. The Council are preparing their LDF which will ultimately replace the UDP. In the meantime, the majority of UDP policies have been 'saved'.

Site Specific Policies

A.37 New Barnet Town Centre is subject to the following specific UDP policies/designations:

- **Table 11.1** and **Map 11.1b** define the town centre as a District Centre;
- The proposals map defines a Main Retail Frontage in the centre; and
- **Policies H1 and TCR2** (as indicated on the Proposals Map) allocate the 4.9ha former East Barnet Gas Works site for mixed use development comprising residential, offices, retail and leisure uses (reference H10).

Key Policies

A.38 The UDP indicates that town centres and retailing are considered to be crucial to the social, economic and environmental wellbeing of the Borough and that the Council is committed to their regeneration and revitalisation. Strategic policies include **Policies GTCR1** and **GTCR2** which seek to direct new retail and other major trip generating development to sustainable locations in order to enhance the vitality and viability of town centres, and aim to ensure that all residents have access to a wide range of goods and services in their closest town centre.

A.39 **Table 11.1** and **Map 11.1** identify the Borough's town centres and set out the Borough's retail hierarchy, which comprises:

- Regional Shopping Centres – Brent Cross;
- Major Centres – Edgware;
- District Centres – Brent Street, Chipping Barnet, Church End Finchley, East Finchley, Mill Hill, Colindale (the Hyde), Temple Fortune, Burnt Oak, Cricklewood, North Finchley, New Barnet, Whetstone, Golders Green, and Hendon Central;
- Local Centres – Childs Hill, East Barnet, Friern Barnet, Market Place, and West Hendod;
- Neighbourhood Centres – Apex Corner, Deansbrook Road, Grahame Park, Hampden Square, New Southgate, Colney Hatch Lane, Golders Green Road, Hale Lane, Great North Road (New Barnet), and Holders Hill Circus.

A.40 **Policy TCR1** directs new retail development towards town centres and specifically existing buildings within the primary and secondary frontages in accordance with the sequential approach. **Policy TCR2** and **Table 11.3** identify a number of town centre sites for development (including the New Barnet Gas Works site for 'mixed use office, retail and leisure on the southern part of the site'. **Policy TCR5** supports retail (and other major trip-generating) development on edge of centre sites where there are no sequentially preferable sites, a demonstrable need, and where linked-trips would be encouraged. **Policy TCR7** considers out-of-centre retail, leisure, entertainment and office development proposals (including extensions to existing buildings), which will be assessed against the long term impact on the viability and vitality of existing town centres. When granting planning permission for out-of-centre development, the Council may impose conditions to control the type of goods sold and/or prevent the creation of additional floorspace, in order to protect the vitality and viability of town centres. Proposals for out-of-centre retail and major trip generating development will also be considered against their public transport accessibility and their traffic impacts.

A.41 The UDP considers that the vitality and viability of its town centres can be maintained and enhanced by ensuring the retention of a strong retail frontage, while also accommodating a diverse range of uses. ‘Main Retail Frontages’ are identified in the Proposals Map for all centres and Primary and Secondary frontages are identified for all of the Borough’s major and district centres, with the exception of New Barnet and Whetstone, which seek to retain the core of retail activity within the heart of these centres. **Policy TCR10** states that within defined primary and secondary frontages changes of use will not be permitted if the town centre’s vitality and viability will be harmed, or where the combined proportion of A1 and vacant uses falls below 75%; the proposed use would result in three or more adjacent non-retail uses; it would detract from the established retail character; or of the proposed use does not fall within Use Classes A2/3/4/5. **Policy TCR11** is a similar policy in respect to defined Secondary Frontages where the proportion of class A1 and vacant uses does not fall below 65%, or if the proposal would not generate sufficient pedestrian activity.

A.42 **Policy TCR12** encourages evening uses in larger town centres where they comply with Primary/Secondary frontage policies, would add to the vitality and viability of the town centre, are in keeping with the character and scale of the surrounding area and would not lead to adverse amenity impacts. **Policy TCR13** encourages residential development in town centres except on the ground floor of primary/secondary frontages, and **Policies TCR14** and **TCR15** give broad support for the location of minicab offices and car showrooms in town centres. **Policy TCR16** supports proposals for new markets where it can be demonstrate that they would enhance the vitality and viability of the centre, and subject to satisfactory servicing arrangements and amenity considerations.

Further Policies

A.43 Further to the above, regard should be had to the raft of further policies relating to the Built Environment; Open Environment; Movement; Housing (particularly with respect to densities, mix/type of housing, and affordable provision); Community Services; Employment, Business and Industry; and Implementation.

Barnet Core Strategy Issues and Options (2008)

A.44 Consultation on the Council’s Core Strategy Issues and Options report took place from late June until the end of September 2008. The report states that the key challenge for Barnet is the need to accommodate significant population growth whilst protecting the Borough's attractiveness. The overriding vision for the Borough is to be a successful city suburb.

A.45 The Core Strategy promotes sustainable growth in town centres, particularly where there is capacity and good accessibility by public transport. One of the core objectives is to create a network of vibrant and flourishing town centres which are commercially successful providing a range of shops and services in accessible locations. The importance of regeneration and environmental improvements is also highlighted as is the need to promote a mix of uses in town centres such as housing.

A.46 The report notes that town centres may need to adapt to changing circumstances, as well as compete with out-of-centre retail locations and other nearby centres. The desire to create a Metropolitan Centre at Brent Cross/Cricklewood is highlighted, as well as the possibility of re-classifying North Finchley and Chipping Barnet as major town centres as a result of retail development. Edgware, North Finchley, Finchley Church End and New Barnet are also considered to have the potential for significant growth in retail floorspace. The report also acknowledges that several town centres, such as Golders Green and Whetstone have evolved to become more dependent on leisure services and the evening economy. Others have specific characteristics which make them unique, such as East Barnet and East Finchley.

A.47 Other issues facing the Borough's centres include the need to ensure careful traffic management to prevent town centres being used as commuter car parks for people working in Central London; the importance of retail for the local economy; the need to ensure the long-term sustainability of local parades and neighbourhood centres, which provide vital shops and services and provide units with lower rental levels where specialist independent retailers can thrive.

A.48 Key options put forward in the report with respect to retailing and town centres include:-

- Should the Council identify Brent Cross/Cricklewood as a new metropolitan town centre, providing it is a mixed use and a sustainable centre?
- Where should further shopping and commercial town centre related development to meet projected demand be allowed - within a limited number of the largest town centres, in any town centre, out-of-centre retail parks or should retail expenditure go outside the Borough?
- Should we prioritise growth in retail expenditure to specific suburban town centres (Edgware, North Finchley, Finchley Church End, Chipping Barnet, New Barnet and Whetstone) where there are identified development opportunities?

- Should we seek to protect more 'local' neighbourhood centres and parades of shops in terms of their potential contribution to sustainable suburbs and shopping?
- Should we provide parking to support retail uses in town centres so that they are better able to compete with other centres and particularly out of centre retail parks and shops?
- Should we restrict the loss of shopping uses in town centres, or only in the core of town centres, allowing more flexible approaches and changes of use at the edges of high streets and secondary locations?
- Should we allow a major expansion and concentration of shopping related development in the larger centres (Edgware, North Finchley, Finchley Church End, Chipping Barnet, New Barnet and Whetstone)?
- Should we allow substantial, mixed-use development in all town centres? Should we be flexible in allowing conversions or should we protect office and commercial uses from changes of use to residential?
- Should we allow more conversions of town centre offices in locations along high streets and main arterial routes to mixed uses including residential, for example, in Finchley Church End and Whetstone, where there is significant vacant office accommodation?
- In recognition of licensing policies, should we limit the evening and night-time economy to a few town centres, for example, North Finchley, and if so, which centres, and what should be the criteria, for example, where they reach 'saturation zone' in terms of activities and undesirable impacts?
- Should we encourage more housing development in town centres to increase evening and night-time activities, and if so, should it be allowed only on the edge or also above other uses such as shops and commercial uses?
- Should some town centres be designated and be the focus of cultural development and leisure such as N12 North Finchley and Chipping Barnet?

Barnet Statement of Community Involvement (2007)

A.49 The Barnet Statement of Community Involvement (SCI) sets out details of how the Council will consult with the community and other stakeholders on the preparation (and revisions to) LDDs. The SCI is underpinned by an ethos of early and continuous community and stakeholder representation in the planning process.

Further Relevant Local Policy Guidance

Planning Brief – Gas Works Site (2000)

A.50 The Planning Brief for the Gas Works site provides guidance on the type and form of development likely to be acceptable to the Council on this site – to include a 'range of uses suitable for an edge of town centre site' (including residential, retail, leisure/hotel, B1 Business and community uses). It advises that any proposals for B1/retail/leisure uses should be in the southern part of the site and that predominantly residential uses are appropriate for the remainder of the site.

London Borough of Barnet Vibrant and Viable town Centres: A Suburban Town Centres Strategy for Barnet (2008)

A.51 This strategy sets out how the Council will create the right environment for town centres in Barnet to flourish. It is a non-statutory document but does explicitly set out the Council's facilitation and enabling role. The strategy is considered to be very important as town centres are a clear indicator of social, economic and environmental well-being in the Borough. It has been prepared in light of the Council's longstanding aspirations to enhance several town centres, including New Barnet.

A.52 The Strategy recognises that the vibrancy of the Borough's town centres is dependent on the willingness of the private sector to invest in them, while noting that the Council has a key role to play in creating the right environment to enable and facilitate investment and growth. The strategy identifies the following key objectives which will be the focus for the Council:

- To improve the appearance of Barnet's town centres – footway improvements, street cleaning improvements, and maximising other opportunities to improve appearance (including seating, flowers and greenery);
- To ensure effective control of parking arrangements – reviews of controlled parking zones;
- To manage development opportunities and changes in planning use effectively – encourage housing (where appropriate), and develop planning strategies for key centres;
- To effectively regulate the street trading environment;
- To maximise take-up of trade waste contracts;
- To improve residents' feelings of safety and security;
- To improve access to information on town centres; and
- To ensure consistency with other Council programmes.

Barnet: A First Class Suburb – Barnet Sustainable Communities Strategy 2006-16

A.53 Barnet's Sustainable Community Strategy sets out a vision for Barnet in 2016, which seeks to respond to the priorities of Barnet residents, as follows:

Barnet is known nationally and internationally as a first class suburb. Its new, inclusive and thriving neighbourhoods have made it one of the largest boroughs in London. Residents enjoy access to large green open spaces, clean streets, an excellent transport network and *affordable, decent homes. It is a place where both young and old can enjoy fulfilling and healthy lives. There is consistently high educational attainment and new local employment opportunities. Crime and fear of crime remains low and communities – established and recently formed – take pride in their area. Public services are of a consistently high standard and meet the needs of the diverse population they serve.*

A.54 To achieve the above vision a series of ambitions are identified, set within 5 themes:

- Investing in children and young people – 16-18 year olds to be in education/ employment/ training; children to achieve their educational potential; and children to be safe and healthy.
- Safer, Stronger and Cleaner Barnet – reduction in the overall level of crime; residents to feel safe; strong and cohesive communities; and clean and green.
- Growing Successfully – affordable and decent housing; keep Barnet moving; people are equipped with the right skills to take advantage of employment opportunities; and Environmentally Sensitive.
- Healthier Barnet – people are supported to take advantage of their own health; health and social care provision is targeted at the most vulnerable, specifically people with mental health needs and disabilities; and access to good quality health services.
- Older People: maximising choice and promoting independence for older people.

The Three Strands Approach (2005)

A.55 The Three Strands Approach represents Barnet Council's planning, development and regeneration strategy and 'spatial vision' that underpins the emerging LDF. The 'three strands' comprise the following:

- **Protection** – absolute protection for the Green Belt and open spaces;
- **Enhancement** – enhancing and conserving the best of Barnet suburbia. This recognises the essential role of successful town centres for the Borough's prosperity and community well-being. The document states that the LDF will incorporate an innovative policy towards suburban town centres which will set out how their different roles will contribute to the overall spatial vision and strategy for successful city-suburbs. It establishes a positive and proactive approach to planning for the future of the borough's town centres, and identifies the role of local town centre frameworks as key tools to guide new development proposals and to ensure that change is planned comprehensively with the assistance and support of the local community; and
- **Growth** – exploiting opportunities for major development growth, sustainable brownfield development and strategic regeneration.

Barnet Corporate Plan (2008/9 to 2011/12)

A.56 The Barnet Corporate Plan (2008/9 to 2011/12) sets out six corporate priorities for the plan period, as follows:

- A bright future for children and young people – improving the quality of life of all Barnet's children and young people;
- Clean, green and safe – ensuring that all our neighbourhoods are a safe, clean and green place to live;
- Supporting the vulnerable – supporting vulnerable adults to live independent and active lives;
- Strong and healthy – ensuring Barnet has a thriving sense of community and our residents lead a healthy lifestyle;
- Barnet: a successful city-suburb – protecting and enhancing the best of Barnet while growing through successful regeneration and sustainable development; and
- More choice, better value – providing community leadership, community choice and higher quality services.

Summary

Summary of Key Policy Considerations:

- The process of local spatial planning should involve producing a vision (that responds to local challenges/opportunities, a sound evidence base, a sense of local distinctiveness, and community derived objectives – within the overall framework of national/regional policy) which should translate into a set of priorities/programmes/policies and land allocations to create a positive framework for investment, regeneration and action on climate change, and contribute to the achievement of sustainable development.
- Sustainable development
- Tackling climate change (including renewable energy infrastructure)
- The 3 Strands Approach – Protect, Enhance, Grow
- Town centres first – protect the vitality and viability of town centres
- The role of a district centre – focus on convenience shopping
- Enhancement of consumer choice (improved retail/service offer, markets, niche roles)
- Quantitative and qualitative need for new development
- The scale of development should relate to the size and role of the centre
- Sequential approach to site selection
- Impacts of development on existing centres
- Accessibility to/within centres (including traffic and car parking controls)
- Evening and late night economy
- More efficient use of land and buildings within existing centres, including higher density development.
- Development site opportunities should be suitable, available and viable
- Definition of primary/secondary frontages (priority of retail uses in primary frontages)
- Mixed use development (including residential)
- High quality inclusive design
- Town centre management
- Use of Compulsory Purchase Orders to achieve change
- Use of Planning Obligations to deliver enhancements

Appendix B – National Trends in Town Centre Uses

A.57 The purpose of this section is to set out a review of wider national socio-economic trends and drivers for change in the retail industry, which are likely to influence future patterns of retail provision and development proposals across the hierarchy of centres in Barnet, including district centres such as New Barnet, and which therefore should be given due consideration in the preparation of the Framework to help ensure deliverability. This section draws upon a range of published data sources, including research by Verdict Analysis, Mintel and the New Economics Foundation.

Demographics

A.58 Over the last 15 years the UK population has increased at a rate of c.0.4% pa, whilst the number of households has increased by 0.5% pa, as average household size has decreased to 2.34 in 2006, with smaller families, more divorces, people living longer etc. The population is also ageing. These trends are forecast to continue and will affect spending habits – how much we spend, on what and where.

A.59 Over the next 20 years the 65 and over age group is expected to grow by 4.5m or 47% and the under 65s age group by only 8% in the UK (a similar trend is predicted for London Boroughs such as Barnet). Older shoppers have a younger mindset than in the past, are more fashion aware and financially better off as a result of house price growth as well as income growth (but post retirement income from pensions could be a concern if they do not achieve anticipated values). They will have more time to shop, will spend more on DIY and gardening and will expect good customer service. Younger shoppers will have higher education fees to pay, will experience higher housing costs, will be more computer literate and spend more on-line, and will spend more on entertainment/leisure so they may have less to spend in the retail property sector (Verdict, 2008).

Income and Expenditure

A.60 Incomes and expenditure have shown strong growth over the last 20 years, with retail expenditure growing faster than incomes. At the same time working hours for many, but by no means all employees have lengthened leading to a cash rich, time poor consumer. Overall retail expenditure has increased by about 3.9% pa in real terms over the last 20 years, with most of this growth on comparison goods rather than convenience goods, where growth has been less than 1% pa. Comparison goods growth has been close to 5.3% pa over the last 30 years, over 6% pa over the last 20 years and even stronger over the last 10 years. These strong trends are not expected to continue in the foreseeable future due to current high levels of consumer debt, an already low savings ratio and a weaker housing market. Over the next 5-10 years the latest economic forecasts suggest that comparison goods expenditure growth will be about 3.8-4.8% pa.

A.61 With longer working hours for many, shop opening hours in the larger centres have been extended and Sunday is now one of the strongest trading days in the week. This has implications for where retail expenditure is concentrated and the nature of some shopping trips which are considered to be a quasi leisure experience. Longer working hours, plus increasing take-up of the Internet and broadband technology, have led to a huge growth in non-store shopping, albeit from a small base.

A.62 Non-store retail sales (catalogues, TV home shopping channels, vending machines etc), excluding e-tailing, are expected to decline over the next ten years, but this will be more than offset by the growth of e-tailing, resulting in overall growth in non-store sales in absolute and percentage terms. Total non-store convenience retail sales (including e-tailing) are expected to increase from 2.5% of sales in 2004 to 7.3% in 2013, and then stabilise, whilst total comparison non-store retail sales are expected to increase from 7.1% in 2004 to around 14.5% in 2013, before stabilising. Strong growth is expected to continue until 2009 and thereafter the growth rate is expected to slow. However, due to the uncertainty about the growth of e-tailing, Experian Business Strategies suggest that a plausible “Low Case” forecast market share for Non-Store Retail Sales in 2016 would be 6% for convenience goods (rather than 7.3% as above) and 13% for comparison goods (rather than 14.5% as above).

A.63 The recent credit crunch has had massive impacts on the retail sector. It is estimated that 1.4 million homeowners will need to remortgage over the next year. A study by the insurance company AXA found that three in four families with an income of more than £30,000 were planning to curb spending this year as household budgets become increasingly stretched. According to Verdict, as customers become more concerned about the economic outlook, they are becoming more selective in their purchasing habits. With rising living costs, disposable incomes are being squeezed, and as a result customers are shopping around more to find the best possible value, and also cutting back on ‘big ticket’ purchases. Increasingly retailers are finding it harder to please customers, and across all sectors, retailers are converting fewer customers into main users and shoppers are less loyal to their main stores (which is both a threat and opportuninty).

Sales Density Increases

A.64 Although hard quantitative evidence is limited, comparison businesses in particular have over time increased sales densities by achieving improvements in productivity in the use of floorspace. PPS6 (paragraph 2.34) requires that quantitative need/capacity assessments have regard to a realistic assessment of such improvement. Analysis of past data is difficult as over the last 20 years sales density increases have been affected by changes in the use of retail floorspace, with higher value space-efficient electrical goods replacing lower value space intensive goods, the growth in out-of-centre retailing, a number of one-off events like Sunday Trading and longer opening hours, and the very strong growth of retail expenditure relative to the growth in floorspace. In the future growth rates of 1.5-2.5% pa seem likely to be achieved for comparison goods (items not obtained on a frequent basis – these include clothing, footwear, household and recreational goods), with much lower growth in sales densities for convenience goods (everyday essential items including food, drink, newspapers/magazines and confectionary). The future growth in sales densities will undoubtedly be affected by the way in which retail space evolves and is used in the future.

Employment

A.65 Over the last 20 years retail expenditure has increased at about 4% pa, but retail employment has increased much more slowly. Total employees in retail employment have increased from 2.2 million to 3.0 million, an increase of 1.5% pa. However, this growth has been in part time employees. Full time equivalent (FTE) employment has hardly increased at all, from about 2.1 million to 2.2 million, a 0.4% pa increase. Over the next 15 years Experian Business Strategies expect a marginal increase in FTE employment in the sector with a slightly higher increase in part time employment.

Location

A.66 Strong income and expenditure growth has affected retailing in another important way – the rise in car ownership and mobility. In 1961 only 30% of households had a car (one or more cars) and only 2% had two or more cars. With public transport (and walking and cycling) the dominant mode of transport, shopping choices were limited and distances travelled were short. By 1970 car ownership had increased significantly so that nearly 50% of households had one or more cars and the number of households with two or more cars had quadrupled but was still under 10%. Currently about 77% of households have one or more cars and a third of households have two or more cars, a huge increase in mobility over the last 30-40 years. Households are now much more mobile than they were and therefore their choices of where to shop and the distances they can travel are much greater. These trends will continue but the rate of change may well diminish.

A.67 Increased mobility and affluence has favoured larger centres over smaller centres. As a result larger centres have increased in size and importance relative to smaller centres which has further reinforced the attraction of larger centres to more mobile shoppers. Smaller centres such as New Barnet have therefore, in many cases, lost market share and have seen much less new development than the overall rate of expenditure growth would imply. This is recognised by PPS6, which urges local authorities to be pro-active in trying to encourage development in smaller centres.

A.68 Increased mobility and affluence has also stimulated out-of-centre development, which has grown much more rapidly than town centre development. Over the last 20 years the majority of retail development has been in edge or out-of-centre locations. This has led to increasingly restrictive planning policy in favour of town centres over the last 10 years, but only recently has the growth in out-of-centre development started to slow. This slow down is expected to continue, but Verdict still expect sales at out-of-centre locations to increase at a faster rate than at in-centre locations.

A.69 PPS6 reinforces the Government's town centre first objectives. The sequential site test is still a cornerstone of retail planning policy, favouring town centre sites and necessitating consideration of the disaggregation of retail park proposals so that smaller sites are considered.

Size of Units

A.70 The growth of multiple traders and increased competition between companies has meant that the retail structure is increasingly dominated by large companies requiring larger shop units. Shopping centres and out-of-centre development that has been able to accommodate this demand for larger sized units (typically 500-2,000 sqm or larger) have grown in importance, reinforcing the importance of higher order centres and out-of-centre retailing (i.e. polarisation in the retail hierarchy).

A.71 The growth in the size of stores has caused a contraction in the number of shop units and consumer choice. This is particularly evident in the food sector, with a marked decline in the number of smaller and more specialist food retailers (greengrocers, butchers, fishmongers, bakers etc), and a large increase of superstores. This is indicated by Verdict Research which shows a 31% reduction in the total number of convenience stores over the last 10 years, as space is concentrated into larger stores. Whilst the number of superstores (>25,000 sqft) has increased by 37%, food specialists and off licences/tobacconists have declined by 35% and 57% respectively. These trends may well weaken in the future due to possible market saturation of large foodstores and concerns over lack of competition due to the market dominance of a few key multiples.

Foodstores

A.72 A by-product of the restriction of new development of large foodstores is the growth in applications to extend existing stores and the changing composition of floorspace within existing foodstores. There is an increasing emphasis on the sale of comparison goods at the expense of convenience goods, as expenditure growth rates for comparison goods are much higher than for convenience goods and margins are greater, although sales densities are often lower. According to Verdict, non-food floorspace in the larger format stores of the top 4 grocers now accounts for between 28% (Morrisons) and 50% (Asda) of sales floorspace.

Shopping and Leisure

A.73 Due to increased affluence and mobility, and the rise of the internet, shoppers no longer merely shop to satisfy ‘needs’, they increasingly shop to satisfy ‘wants’ as well. Retailing in the higher order centres and the more attractive smaller centres is changing and arguably becoming more of a quasi leisure experience. Leisure spending growth is continuing to outstrip that of retail, and despite the economic slowdown, at the moment consumers seem to be willing to continue spending on leisure.

A.74 Quality restaurants, coffee shops, cafes and bars, as well as health and fitness centres and multiplexes in larger centres, are therefore important to attract shoppers and encourage longer stays and higher spending. Better integration of retail and leisure facilities mutually benefits both sectors. Pedestrianised streets and covered retail areas are also important in attracting shoppers, as is the overall attractiveness of the town centre, along with good accessibility and car parking.

A.75 A number of factors have helped drive the growth of leisure provision in town centres. Planning policy is important as is the fact that urban living is fashionable. Town centres can offer consumers a much more vibrant atmosphere in which to eat and drink and they also offer a much wider choice of leisure venues, allowing more spontaneous decisions. For bars, restaurants and health & fitness clubs, the attraction of the town centre is ‘daytime trade’ and the ability to capitalise on proximity to businesses and shoppers.

Internet Shopping/E-tailing

A.76 Online spending is growing at its fastest rate for six years, driven by convenience and low prices, and so far e-retailing is showing no signs of being affected by the recent economic downturn. According to Verdict (2008), the e-retail market grew by 35% between 2006 and 2007, which is considerably higher than the 3.6% growth in the total retail market, and e-retail is expected to continue outperforming the total retail sector over the next five years.

A.77 Worth £14.7bn in 2007, the online market is becoming an increasingly important contributor to retail, accounting for 5.2% of all retail sales, (up from 3.8% in 2006). Verdict's research found that almost 66% of UK households now have access to the Internet, with 55.5% having broadband access, which is making online shopping easier, faster and more reliable. As technology continues to improve, it will fuel further growth in the market. Overall the internet shopper population is forecast to grow by c.50% between 2007 and 2012.

A.78 The online market is dominated by the electrical and food & grocery sub-sectors, which between them account for around half of all sales. The food & grocery sub-sector, with rapid growth of 39.5% in 2007 is expected to overtake electricals in the top spot. Online clothing and footwear sales grew 38% during 2007, and with sales of £1.7bn, clothing & footwear is the UK's third largest online market. Although only accounting for a very small share of online spending, the market which saw the most dramatic online growth in 2007 was furniture and floor coverings, growing by 41% from £0.4bn to £0.7bn, despite the slowdown in the sector overall, with Ikea's launch of a transactional website being sited as one of the drivers of growth. The music & video sector continues to have the overall highest online market penetration at 30.8% of total sector sales, and this is forecast to double by 2012, which could have implications for physical store requirements.

A.79 As a consequence of this growth, there are huge pressures on retailers as the Internet has provided an attractive alternative for many consumers. Shoppers are selecting their own retail mix online and shopping centres need to compete with this choice, which is not only driven by price and range, but also service and expertise. Town centres will increasingly have to provide a retail experience that the Internet and supermarkets are unable to match, and the market will respond in some way to the varying impacts on different retail sectors. In accordance with PPS6, the emphasis should be on the overall town centre experience, the mix of uses, and not just the retail offer.

Summary

Summary of Key Considerations:

- Retail expenditure has grown faster than incomes over the past 20 years.
- Sales densities have increased over the past 20 years due to higher value space efficiency and longer opening hours.
- Development has been focussed in larger centres which have benefited from increases in consumer spending – smaller centres (such as New Barnet) that have been unable to diversity their offer or create a niche market have struggled to compete and in many cases have declined. This trend has been assisted by increased car ownership which has increased shopping mobility
- Growth in internet shopping looks set to continue, which will affect the future role/purpose of the High Street
- The recession has badly effected the retail sector – falling sales, more value-driven customer base, less customer loyalty, cutting back on 'big ticket' purchases. This is both an opportunity and a threat for New Barnet.
- Foodstore operators continue to evolve their formats and offer – including convenience stores and mini-department stores (greater focus on comparison offer). Restrictions on out-of-centre development have led to a return to the high street. This is a key opportunity for New Barnet, if managed appropriately.
- Continued operator trend towards larger format stores.
- Expenditure on comparison goods is increasing at a faster rate than for convenience goods

Appendix C – Vitality and Viability Healthcheck

A.80 The purpose of this section is to report on the outcomes of a detailed vitality and viability health check of the centre undertaken in accordance with the key indicators set out in PPS6. Healthchecks are key planning tool to identify the operating issues of a centre, and is therefore a key part of the baseline analysis that should inform the Framework.

A.81 Published information for New Barnet Town Centre is limited therefore the assessment draws largely on data provided by the London Borough of Barnet and a site visit carried out by GVA Grimley in May 2009. The centre is defined using customised data provided by the Council which has been drawn from Experian Goad and itemises each unit in the centre, identifying fascia, address, activity, Experian category, retail category, floorspace, use class and frontage.

Diversity of Main Town Centre Uses

A.82 The composition data provided by the London Borough of Barnet and Experian Goad (June, 2007) identifies a total of 12,870sqm of floorspace for retail and service businesses, comprising 80 units in New Barnet district centre. Table A.1 below sets out the composition of New Barnet by the number of units and floorspace, compared to the average of all UK centres audited by Goad.

Table A.1 New Barnet District Centre Retail Composition by Unit and Floorspace

Retail Category	No. of Units	Total (%)	National Average (%)	Variant (%)	Floor space (sqm gross)	Total (%)	UK Average (%)	Variant (%)
Comparison	19	23.75	34.87	-11.12	2,380	18.49	38.39	-19.90
Convenience	6	7.50	8.82	-1.32	5,200	40.40	14.24	26.17
Service	41	51.25	45.84	5.41	4,370	33.95	38.79	-4.84
Vacant	14	17.50	10.30	7.20	920	7.15	8.46	-1.31
Total	**80**	**100**	**100**	**-**	**12,870**	**100**	**100**	**-**

Source: LB Barnet / Experian Goad, June 2007

A.83 It is evident that the centre has a below average comparison goods offer by both unit count and floorspace. The centre also has a below average number of convenience stores, however this does not suitably reflect the amount of convenience provision included within the Sainsbury's foodstore located on East Barnet Road (4,760sqm gross), as in terms of floorspace, the centre has an above average convenience provision, largely attributable to the

4,760 sqm gross Sainsbury's. The Sainsbury's also incorporates an element of comparison goods floorspace (approx 10%) which is not reflected in Table A.1 above.

A.84 The comparison goods provision in the centre includes one charity shop, one clothing shop, a shoe shop, a florist, a chemist, DIY/home improvement stores, interior furnishings stores, bike shops and a tool/machine hire outlet. A review of historic data indicates a pattern of retail units changing use to service uses.

A.85 As noted above, the large Sainsbury's unit is the main foodstore and acts as a key attractor to the centre. The store, which opened in 1980, occupies a central position with a frontage directly onto East Barnet Road. It comprises a net sales area of 2,955[1] sqm and is open from 08:00am until 10:00pm Monday to Saturday, and 10:00am until 04:00pm on Sunday. The store offers a range of fresh food counters including a deli, bakery, fishmonger and butcher and there is also an in-store pharmacy. Customer parking is provided on the upper levels above the main store, accessed by two lifts situated outside the main entrance. Parking is restricted to a maximum of 2 hours. In addition to the Sainsbury's, there are two newsagents, two smaller convenience stores and an off-licence.

A.86 The Barnet Town Centres Floorspace Needs Assessment (April 2009) identified a convenience goods turnover of £44.3m for New Barnet district centre which is largely drawn from the immediate surrounding area. The study estimates that the Sainsbury's has a turnover of £38m which, compared to the company average of £25.9m, suggests it is trading strongly.

A.87 Our review of the retail composition of the centre highlights that 51% of the units (41) in the centre are occupied by service operators. These include a range of services such as dry cleaners and laundrettes, hair and beauty salons, opticians, financial and property services. There are a small number of cafes/restaurants plus several hot food takeaways which together account for half the total number of service units in the centre. Many of these are situated along the main high street, East Barnet Road. There are no banks/building societies within the centre although there are two ATMs at the Sainsbury's.

Retail Floorspace in Edge and Out-of Centre Locations

A.88 Convenience retail floorspace within the centre is supplemented by a Majestic Wine Warehouse on Victoria Road and the Tesco Express store on East Barnet Road. This store is incorporated into the Esso petrol filling station located in between New Barnet District centre and East Barnet local centre. The store extents to 233sqm (net), offers a wide range of food goods to meet top-up convenience needs and is open for 18 hours per day, 7 days per week.

[1] IGD, 2009

A.89 Further out-of-centre retail provision in the local area includes Tesco Express on East Barnet Road; Waitrose in North Finchley and Whetstone; Tesco Extra at Colney Hatch; Tesco at Brent Cross; and M+S Simply Food in Whetstone. The closest retail warehouse park is at Friern Bridge Retail Park (which is supplemented by a number of standalone units) where the majority of floorspace is in DIY, electronics and furniture (traditional 'bulky goods' operators), which indicates that the role of traditional 'town centre type' retailers is somewhat limited in these locations.

Development Opportunities

A.90 There are a number of sites coming forward for potential development in and at edge-of-centre locations (including the former East Barnet Gas Works site, the former Optex site, and 7-11 Victoria Road) which are able to accommodate significant growth in town centre use floorspace. Further detail is provided in Section 8 of the NBTCF Scoping Report.

Retailer Representation

A.91 There are presently 12 units operated by multiple retailers in the town centre including Sainsbury's, Ladbrokes, Bargain Booze, JD Whetherspoon, Pizza Hut and LA Fitness amongst others. Multiple retailer representation is treated as an indicator of key retailer interest in a centre and is therefore often regarded as a positive performance indicator. It is important to recognise that this does not negate the equally key role of independent retailers and their contribution to the overall performance and character of a centre. Independent retailers represent 67.5% of all units in the centre and therefore contribute significantly towards the current functioning of New Barnet.

Vacant Retail Property

A.92 The proportion of vacant (street-level) property is also an important indicator of the relative vitality and viability of a centre. Table A.2 indicates that there were 14 vacant units in New Barnet in June 2007. This is equivalent to a vacancy rate of 17.5% which is above the national average (10.3%), although in terms of the amount of floorspace, the vacancy rate in New Barnet is only 7.2% which is below the 8.5% national average.

Table A.2 Vacancy Rate in New Barnet by Unit and Floorspace (2009)

Vacant Units	New Barnet Town Centre	UK Average
Vacant Units (No.)	14	-
% of Total	17.5%	10.3%
Vacant Floorspace (sqm gross)	920	-
% of Total	7.15%	8.5%

Source: LB Barnet / Experian Goad, June 2007

A.93 The units identified by the London Borough of Barnet and Experian Goad in June 2007 were generally distributed throughout the centre. This data was updated by survey work in May 2009, which confirmed that nine units identified as vacant in 2007 have remained vacant, whilst five have since been occupied. New operators include a barbers, a photographers, a café and two estate agents, all of which have further supplemented the centre's overall service provision. In May 2009, three new vacant units were identified following the closure of a convenience store and the Curves healthclub (both on Station Road) and the relocation of Steve's barber shop to an adjacent unit on East Barnet Road.

A.94 There is also a derelict/vacant sites at the corner of East Barnet Road and Victoria Road and no.11 Victoria Road.

Retailer Requirements

A.95 Due to the relatively small size and status of the town centre there is no published data indicating retailer requirements for the centre. However, there is clear evidence of retailer interest in the centre by Tesco and Asda for foodstore-led development.

Retail Rents and Commercial Yields

A.96 Due to the relatively small size of the centre (and lack of recent transactional activity), robust data on typical rental values and yields is not available. However, consultation with retail agents (GVA Grimley) indicates that Zone A rental values (the value of the first 6m depth of retail floorspace from the shopfront) of around £30/sqft (c.£2.80/sqm) at yields (annual rate of return on capital investment) of around 10%. Floorspace in competing centres such as Chipping Barnet and North Finchley would be expected to achieve higher values and lower yields (which would make space more attractive to investors).

Pedestrian Flows

A.97 Observational evidence suggests that East Barnet Road has the highest levels of pedestrian activity with movements focussed around the Sainsbury's store and the bus stops. Pedestrian activity is noticeably lower away from these areas of concentration.

Accessibility

A.98 Accessibility is an important consideration when focusing on the health and future prospects of a centre. Ease of access and parking are key factors influencing underlying success and attract of a centre for customers, businesses and visitors.

A.99 The centre is well-served by rail and buses. There are reasonable links between the station and the district centre and direct access to the Sainsbury's foodstore from New Barnet Station, although these offer significant scope for enhancement. The station is well sign-posted from the centre and visa-versa. Buses stop in the core retail area on East Barnet Road. The railway line acts as a physical barrier to east-west pedestrian movement.

A.100 There are several car parks serving the centre. To the west of the railway line the car park is reserved for permit holders only, however to the east there is a Pay & Display car park, providing c.80 spaces, although this operates charges from a daily rather than hourly basis and is aimed at those utilising the station as opposed to the centre. Sainsbury's has the largest car park in the centre with c.120 spaces situated above the store and a further c.80 spaces in an adjacent overflow car park. However, these spaces are reserved for customer parking only and for a maximum of two hours. There is a further Pay & Display car park located on East Barnet Road which applies charges by the hour between 9:00am and 5:00pm Monday to Friday. In addition to these car parks there is also some provision for on-street parking along New Barnet Road and surrounding streets.

A.101 The quality of pedestrian linkages between the centre and surrounding residential areas varies – the heavy volume of traffic using East Barnet Road combined with inadequate pedestrian crossing facilities makes pedestrian movement to and within the centre difficult in some parts (particularly around the Victoria Road/East Barnet Road junction). Ease of pedestrian movement is further hampered by poor car parking control which has led to a prevalence of parking on pavements.

Crime

A.102 Total notifiable offences recorded by the Metropolitan Police in April 2009 in sub ward E01000171 (which encompasses the majority of the defined Main Retail Frontage of the town centre) was 13.87 per 1,000 population, which was the highest rate recorded for any of the sub wards within East Barnet ward (which had an average rate of 5.87 offences). Detailed crime statistics below the ward level are limited, however data indicates an above average rate of violence against the person and theft of a motor vehicle in sub-ward E01000171 (the town centre) when compared to surrounding (principally residential) wards. This level of recorded crime in the town centre sub-ward is categorised as 'average' by the Metropolitan Police, which is the same category as that applied to the rest of the Borough, therefore these statistics are not considered to represent an adverse indicator of vitality and viability.

Customer and Residents Views and Behaviour

Citizens Panel 24: Barnet's Town Centres – Use and Perceptions Amongst Residents (2007)

A.103 In Summer 2007, Barnet Council undertook a combined postal and online survey of local residents to gain an understanding of how the Borough's town centres are used. The survey was designed to identify various shopping patterns including reason and frequency of visits, mode of travel, visitor satisfaction, the level and use of evening leisure facilities and participation in late night shopping.

A.104 Although the study is two years old, it does identify some useful trends/views of relevance to the NBTCF, as summarised below:

- New Barnet was the 3rd most popular location for main food shopping, but only the 10th most popular for top-up food shopping;
- In 62% of cases the town centre most commonly visited was the town centre nearest home;
- The satisfaction rating (under key indicators) for New Barnet was 3.28/5 for 'getting there'; 2.53/5 for attractions; 2.75/5 for 'range' and 2.6/5 for 'environment'. In all cases, the ratings for New Barnet was below the average for all of the borough's centres;
- Respondents rated New Barnet 3.28 out of 5 for 'getting there' (public transport services, access by road, car parking, access for pedestrians, and cycle access/parking) – ranked 13th out of 17 Barnet centres.
- Respondents rated New Barnet 2.53 out of 5 for its 'attractions' (range of shops, pubs, cafes, and restaurants) – ranked 16th out of 17 Barnet centres;

- Respondents rated New Barnet 2.75 out of 5 for its 'range of other services' (banks/building societies, health services, leisure services, and libraries) – ranked 14th out of 17 Barnet centres;
- Respondents rated New Barnet 2.6 out of 5 for its 'environment' (places to sit and rest, signposting, street lighting, street cleanliness, public toilets, safety and security and disabled access) – ranked 13th and of 17 Barnet centres.
- 71% of those whose most frequently visited centre is New Barnet normally travel to that centre by car (driver) (the average for all centres was 44%);
- Edgware, North Finchley and Chipping Barnet were the most popular centres for leisure evening facilities. Two-thirds of respondents used leisure facilities outside of the Borough;
- In terms of aspirations for change, respondents prioritised more shops, later opening hours, events/festivals, and more restaurants in New Barnet – support for more bars, clubs, cinemas and health and fitness centres was limited. In terms of the type of retailers, aspirations were focussed on improving the comparison goods offer (notably clothes/footwear and other fashion goods); and
- 80% of respondents expressed interest in a farmers market in New Barnet.

Qualitative Research to Inform the Suburban Town Centres Strategy, Alpha Research, 2007

A.105 In October 2007, an independent research agency was commissioned by Barnet Council to consult with residents, businesses and ward members on the Borough's town centres. This qualitative research focussed on the main centres of Chipping Barnet, Edgware and North Finchley. The research identified various perceptions of each centre broadly relating to the range of shops and services on offer, accessibility and parking provision, the quality of the environment and crime and safety. The consultation also highlighted desired improvements which included a greater breadth of the local retail offering, general environmental improvements, and more police presence in the evenings

Environmental Quality

A.106 The overall quality of the environment varies across the centre. There is some provision of street furniture including mature trees, seating, bins, lighting, safety bollards and railings, and provision of bicycle stands. However, some of these items are in poor condition and would benefit from re-painting or replacement. Similarly the quality of the pavements in the centre varies considerably. Along Lytton Road, the concrete pavement is in a poor condition and would benefit from improvement. The part-brick, part-concrete pavement along East Barnet Road is in a better condition although there are patches where it is broken or uneven which could be repaired. The pavements are generally wide and there is some provision for outside seating which complements the street scene. There is also CCTV and we did not observe any evidence of litter or graffiti on our site visit.

A.107 Buildings in the centre also vary considerably. The shops situated along Lytton Street are generally small, single-storey units with some set in front of two-storey residential buildings. Some shop fronts appear to be well-maintained and several have modern fascias, although there are exceptions. Other buildings in the centre include more traditional three-storey terraces with shops operating at ground floor level. There are also several traditional public houses which are detached from surrounding buildings.

A.108 There is a greater mix of building types along East Barnet Road with some examples of post-modern developments, including that which incorporates the Sainsbury's, set against more traditional two-storey terraces and individual detached units of varying ages. Overall, the quality of the built environment along East Barnet Road is reasonable, although there is a lack of continuity of scale, style, and form in their appearance. There are some exceptions, including those units which are vacant and have fallen into disrepair. In particular, the derelict/vacant site situated on the corner of East Barnet Road and Victoria Road is unsightly and, for such a prominent location, would benefit from redevelopment/refurbishment.

Health of Competing Centres

A.109 For the purposes of comparison, the health of key competing centres is considered briefly below (information taken from the Barnet NCFNA (2009))

Chipping Barnet District Centre

A.110 Chipping Barnet is a large centre that offers a good range of comparison, convenience and service goods provision from a mix of multiple and independent retailers. The focus of the centre is the Spires Shopping Centre which provides a modern yet sympathetic centre, largely occupied by multiple high street retailers and anchored by the Waitrose foodstore. The centre is clean and well maintained (at the time of the assessment) and while there are some vacant units these are broadly dispersed throughout the centre and do not significantly detract from the overall shopping environment. There is good provision of food and drink outlets throughout and a concentration of coffee shops in and around the shopping centre and the provision of outdoor seating which adds to the vibrancy of the inner courtyards.

Whetstone District Centre

A.111 Whetstone has a high quality convenience goods provision as well as a range of quality independent comparison outlets and high street multiple retailers. There is a noticeable provision of food and drink outlets and some provision of outdoor seating that contributes to the street scene. The centre is somewhat dominated by heavy traffic flows along High Street, however the overall environment seems clean and well maintained, and the provision of trees and planting helps alleviate the impact of the road. There are some vacant units, but these are generally distributed across the centre and do not significantly detract from the environment. Overall the centre is considered to be vital and viable and performing well in line with its position in the retail hierarchy.

East Barnet Local Centre

A.112 The centre benefits from an attractive village character which is reinforced by the range of traditional uses and specialist operators. There are good linkages between the centre and surrounding residential areas which supports its role as a convenient destination to meet local day-to-day shopping needs and services whilst the provision of specialist stores could also draw some shoppers in from further afield. The centre has a well maintained and attractive environment although some shop fronts could be improved to enhance the overall appearance further. Overall the centre is considered healthy, vital, and viable and performing well in its role.

Summary

Summary of Key Considerations

- Centre performs the role of a district centre
- Centre is anchored by a Sainsbury's foodstore
- Poor representation by other convenience and comparison multiple retailers offset by a varied independent offer.
- Generally a lower 'quality' retail offer
- Majority of units occupied by service providers with a high occurrence of A3/A4/A5 uses (increasing trend)
- There is a post-office but no bank or building society facilities
- Below average vacancy rate (in terms of floorspace)
- Good accessibility by rail, bus, and car but poor provision for pedestrian movement within centre
- Quality of the environment would benefit from enhancement – absence of public space
- Primary and secondary retail frontages are not clearly defined.
- No consistency in frontage appearance/style/scale
- Performance of competing centres is generally assessed to be healthier (more viable and vital).

Appendix D – Census Data (Socio-economic Profile of Catchment)

A.113 The purpose of this section is to set out key Census-based demographic statistics in order to build a socio-economic profile of the local area which would represent the town centre's principal catchment area, in the context of London Borough of Barnet and England and Wales as a whole. For the purposes of this section, the centre's principal catchment area is defined as an area comprising Super Output Area (Middle Layers) 002, 003, 005, 006, and 008.

Table A.3 Age Structure

Age (years)	New Barnet Catchment Area	London Borough of Barnet	England and Wales
0-17	21.9%	22.7%	22.7%
18-29	15%	17.7%	15%
30-44	24.9%	23.8%	22.5%
45-59	18.8%	17.2%	18.9%
60-74	11.9%	11.3%	13.3%
75+	7.5%	7.2%	7.6%

Table A.4 Religion

Religion	New Barnet Catchment Area	London Borough of Barnet	England and Wales
Christian	60.3%	47.3%	71.7%
Buddhism	0.7%	1.1%	0.3%
Hindu	3.8%	6.7%	1.1%
Jewish	7.3%	14.8%	0.5%
Muslim	3.4%	6.2%	3.1%
Sikh	0.2%	0.4%	0.7%
Other/ No Religion	24.5%	23.6%	22.6%

Table A.5 Country of Birth

Country of Birth	New Barnet Catchment Area	London Borough of Barnet	England and Wales
UK	81.1%	69.5%	91%
Other Europe	6.0%	8.4%	2.9%
Africa	4.2%	7.4%	1.6%
Asia	6.9%	11.6%	3.1%
North/South America	1.2%	2%	1.0%
Other	0.6%	1%	0.4%

Table A.6 Household Composition

Household Composition	New Barnet Catchment Area	London Borough of Barnet	England and Wales
Single Person	33.2%	31.3%	30.0%
Family – Pensioner	7.9%	7%	9.0%
Family – Married Couple	36.9%	34.5%	36.5%
Family – Co-habiting	7.3%	6.2%	8.3%
Family – Lone Parent	8.1%	9.7%	9.5%
Other	6.6%	11.2%	6.7%

Table A.7 Household Tenure

Tenure	New Barnet Catchment Area	London Borough of Barnet	England and Wales
Own Outright	33.1%	30.1%	29.2%
Own with a Mortgage	41.2%	35.6%	38.9%
Shared Ownership	0.9%	0.9%	0.7%
Rented from Council	5.5%	10.5%	13.2%
Rented from Housing Association	3.2%	4.5%	6.1%
Rented from Private Landlord	12.4%	15.3%	8.8%
Other	3.7%	3.2%	3.2%

Table A.8 Economic Activity

% of People Aged 16-74	New Barnet Catchment Area	London Borough of Barnet	England and Wales
Economically Active	70.6%	67.84%	66.87%
Economically Inactive	29.4%	32.16%	33.13%

Table A.9 Approximate Social Grade

Social Grade	New Barnet Catchment Area	London Borough of Barnet	England and Wales
AB	31.1%	31%	22.2%
C1	37.7%	36.3%	29.7%
C2	10.1%	9%	15.1%
D	9.9%	11.2%	17.0%
E	11.2%	12.5%	16.0%

Table A.10 Qualifications (persons aged 16-74)

Level of Qualifications Achieved	New Barnet Catchment Area	London Borough of Barnet	England and Wales
None/Other	24.4%	24.4%	35.8%
Level 1	14.2%	11.2%	16.6%
Level 2	20.5%	18%	19.4%
Level 3	10.2%	10.8%	8.3%
Level 4/5	30.8%	35.5%	19.9%

Summary

Summary of Key Considerations

- Slightly older age profile than the Borough average
- Higher proportion of Christians and lower proportions of Buddhists, Hindus, Jews, Muslims, and Sikhs than the Borough average, although the religious profile is still more mixed/diverse than the national average figure.
- The proportion or residents in social classes ABC1 in the local area is slightly higher than the Borough average and significantly higher than the national average;
- A greater proportion of local residents were born in the UK when compared to the average of all Borough residents, although the figure is lower than the national average. Immigrants were most commonly born in Asian, other European, or African countries – Cyprus, India, Kenya, and the Republic of Ireland are the most common.
- The local area has a higher proportion of single person households than the Borough and national averages.
- A significantly higher proportion of owner-occupiers (with or without mortgages) in the local area than the Borough and national averages.
- On average local residents have a lower educational attainment than the Borough-wide profile, although higher than the national average.
- There is a higher than average economic activity rate among local residents.

Appendix E – Town Centre Use Floorspace Need and Impact

A.114 The purpose of this section is to set out assessed levels of quantitative and qualitative need for further town centre use floorspace in this part of the Borough, and to consider potential impacts on competing centres of further development in New Barnet.

A.115 This section uses (and builds upon where appropriate) the data, assumptions, and outputs from the Barnet Town Centre Use Floorspace Need Assessment (TCFNA) undertaken by GVA Grimley in 2009, which was prepared in order to establish a sound evidence base to inform the preparation of the Borough's Local Development Framework. Based on comprehensive research and analysis (underpinned by up to date telephone surveys and expenditure growth rates), the study assesses the need for additional floorspace in the Borough's centres in the period to 2026 (although it should be noted that the study advises that forecasts beyond a five year period should be interpreted with caution).

A.116 The Study identifies capacity for additional floorspace in distinguished sub-areas within the Borough. New Barnet Town Centre is located within the 'North' sub-area which comprises postcode areas EN4 8/9, EN5 1/2/3/4/5, and N20 8/9 – this sub-area also includes Chipping Barnet (defined as a District Centre in the Barnet UDP), East Barnet (a Local Centre) and Great North Road (a Neighbourhood Centre).

Floorspace Capacity/Need

Retail (Convenience and Comparison Goods)

A.117 Tables A.11 and A.12, on the following page, set out estimates of residual convenience goods and comparison goods spending capacity in the North Sub-area taking account of existing commitments (the Tesco Express store at 7-11 Victoria Road). The tables forecast convenience goods expenditure of £13.4m in 2011, rising to £19.6m by 2026 (based on existing market shares) and comparison goods capacity of £1.6m in 2011 rising to £18.5m by 2026.

Table A.11 Capacity Estimates (North Sub-area) – Convenience Goods

	Year				
	2008	**2011**	**2016**	**2021**	**2026**
Total Convenience Goods Turnover in North Sub-area (£000)	76,008	76,431	78,743	80,605	82,601
Existing Shop Floorspace (sqm net)	7,672	7,672	7,672	7,672	7,672
Committed Shop Floorspace (sqm net)*	241	241	241	241	241
Sales from Existing Floorspace (£000)	76,008	59,900	59,900	59,900	59,900
Sales from Committed Floorspace*		3,107	3,107	3,107	3,107
Residual Spending to Support New Shops (£000)	-	13,424	15,736	17,598	19,594

* Tesco Express at 7-11 Victoria Road (sales figure based on company average sales of £12,894/sqm, source: Barnet TCFNA, 2009)
Source: Barnet TCFNA (2009)

Table A.12 Capacity Estimates (North Sub-area) – Comparison Goods

	Year				
	2008	**2011**	**2016**	**2021**	**2026**
Total Comparison Goods Turnover in North Sub-(£000)	27,478	30,301	37,242	45,044	54,435
Existing Shop Floorspace (sqm net)	11,443	11,443	11,443	11,443	11,443
Committed Shop Floorspace (sqm net)	0	0	0	0	0
Sales from Existing Floorspace (£000)	27,478	28,733	30,954	33,346	35,923
Sales from Committed Floorspace	0	0	0	0	0
Residual Spending to Support New Shops (£000)	0	1,568	6,288	11,698	18,512

Source: Barnet TCFNA (2009)

A.118 The viability/vitality healthcheck assessment set out in Section 7 of this report identifies a number of qualitative deficiencies in existing provision in the centre, including the following:

- Limited consumer choice for convenience goods;
- Limited comparison goods offer (particularly higher quality goods);
- Limited multiple retailer representation; and
- Limited niche/specialist retail offer.

Leisure

A.119 The Barnet TCFNA (2009) includes a quantitative and qualitative assessment of capacity/need for a range of leisure uses in the Borough. The Study suggests that per capita expenditure on leisure and recreation goods and services is projected to increase from a base position of £2,436 per capita (per annum) in 2008 to £3,734 by 2026 (leisure expenditure is defined as recreation and sporting services, cultural services, games of chance, café's/bars/restaurants, accommodation services, and hairdressers/personal grooming establishments), which would equate to an expenditure increase in the North sub-area from £162m in 2008 to £248m by 2026 – a 53% increase.

A.120 The assessment considered that the Borough as a whole benefited from reasonable quantitative provision of cinemas, ten pin bowling and bingo facilities which was sufficient not to warrant additional provision until market demand dictates otherwise. New Barnet is served by the Odeon Cinema on the Great North Road; Hollywood Bowl (ten-pin bowling) in North Finchley; and Gala Bingo in Borehamwood (outside the Borough boundary) (plus several other leisure parks further afield). Accordingly, there is concluded to be no need for additional provision in New Barnet Town Centre.

A.121 The Study suggests that New Barnet Town Centre is well served by existing health and fitness facilities including LA Fitness. In terms of planning for further facilities, the study advises that this sector is likely to continue growing as personal health awareness gains further momentum, however it is not necessary to identify/plan for specific further provision until the market dictates otherwise.

A.122 The Study indicates that there is considerable scope to enlarge the evening economy across the Borough. At present a large proportion of expenditure leaks out of the Borough (particularly to Central London, Camden, Hampstead, and Borehamwood), with North Finchley being the most popular location within the Borough. The study estimates that expenditure on restaurants and cafes is increasing at a rate of 2.4% per year, which offers significant future spending capacity to increase the provision of such outlets across the Borough's centres. From a qualitative point of view, the existing food and drink/evening economy offer in New Barnet is very limited and would benefit from a broader offer and general enhancement.

A.123 The Greater London Authority's Hotel Demand Study suggests a net need for a further 500 hotel rooms in Barnet by 2026. Existing Borough-wide commitments total 276 rooms which is considered to be sufficient to meet requirements in the short to medium terms, and which, when coupled with the limited complementary offer in New Barnet centre suggests that there should be little or no need to plan for hotel accommodation in New Barnet centre.

Offices

A.124 The Barnet TCFNA (2009) suggests that the Borough of Barnet is viewed as the major office location within the North London Sub-region, and that on account of the significant job and population growth projections for north London in the period to 2026, market trends indicate an increase in office demand in the Borough going forward. Occupier demand is expected to focus on the Borough's established office locations (Brent Cross, Edgware, Finchley, North London Business Park, The Hyde, Golders Green, and Hendon), with little demand for new floorspace in less established office locations such as New Barnet.

Retail Floorspace Impact Scenario Testing

A.125 As noted above, there is a demonstrable quantitative and qualitative need for additional convenience and comparison floorspace in the North sub-area of the Borough. In order to establish the appropriate scale/quantum of retail floorspace that should be directed towards New Barnet town centre (if any), regard should be had to the potential impacts on the vitality and viability of other competing centres from such development.

A.126 Accordingly, the impacts of a range of alternative development scenarios on the projected turnover of existing centres have been tested, as follows (the scenarios assume a 2011 base year):

- One additional foodstore in New Barnet (net convenience goods sales areas of 1,000sqm, 1,500sqm, 2,000sqm, 2,500sqm, 3,000sqm, 3,500sqm, and 4,000sqm);
- More than one additional foodstore in New Barnet (with total net convenience goods sales areas of 1,000sqm, 1,500sqm, 2,000sqm, 2,500sqm, 3,000sqm, 3,500sqm, and 4,000sqm); and
- Additional comparison goods floorspace in New Barnet (total net sales areas of 1,000sqm, 1,500sqm, 2,000sqm, 2,500sqm, 3,000sqm, 3,500sqm and 4,000sqm).

A.127 The outcomes of this impact testing work are set out in Tables A.13, A.14, and A.15 on the following pages (refer to Appendix A for a schedule of assumptions that have underpinned this modelling work, and the Barnet TCFNA 2009 for further baseline information):

Table A.13 Turnover Impacts of One Additional Foodstore in New Barnet

Scenario	FORECAST TURNOVER 2008 (£000)	FORECAST TURNOVER 2011 (£000) NO NEW DEVELOPMENT	IMPACT ON TURNOVER 1,000SQM ADDITIONAL FLOORSPACE		IMPACT ON TURNOVER 1,500SQM ADDITIONAL FLOORSPACE		IMPACT ON TURNOVER 2,000SQM ADDITIONAL FLOORSPACE		IMPACT ON TURNOVER 2,500SQM ADDITIONAL FLOORSPACE		IMPACT ON TURNOVER 3,000SQM ADDITIONAL FLOORSPACE		IMPACT ON TURNOVER 3,500SQM ADDITIONAL FLOORSPACE		IMPACT ON TURNOVER 4,000SQM ADDITIONAL FLOORSPACE	
			£000	%	£000	%	£000	%	£000	%	£000	%	£000	%	£000	%
New Floorspace, New Barnet			14,000		21,000		28,000		35,000		42,000		49,000		56,000	
New Barnet (Existing Stores)	44,349	44,551	-6,090	-14	-9,135	-21	-12,180	-27	-15,225	-34	-18,270	-41	-21,315	-48	-24,360	-55
Chipping Barnet	21,423	21,614	-1,757	-8	-2,636	-12	-3,514	-16	-4,392	-20	-5,271	-24	-6,149	-28	-7,028	-33
Whetstone	18,999	19,189	-735	-4	-1,103	-6	-1,470	-8	-1,838	-10	-2,205	-11	-2,573	-13	-2,940	-15
North Finchley	34,514	34,567	-637	-2	-956	-3	-1,274	-4	-1,593	-5	-1,911	-6	-2,230	-6	-2,548	-7
Tesco, Colney Hatch Lane	65,760	66,219	-567	-1	-851	-1	-1,134	-2	-1,418	-2	-1,701	-3	-1,985	-3	-2,268	-3
Tesco Express East Barnet Rd	8,445	8,466	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Marks and Spencer, Whetstone	1,792	1,801	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Waitrose North Finchley	37,935	38,159	-84	0	-126	0	-168	0	-210	-1	-252	-1	-294	-1	-336	-1
Waitrose Mill Hill East	21,869	22,361	-238	-1	-357	-2	-476	-2	-595	-3	-714	-3	-833	-4	-952	-4
Local Centres	6,567	6,658	-70	-1	-105	-2	-140	-2	-175	-3	-210	-3	-245	-4	-280	-4
Other	866,150	888,687	-3,822	0	-5,733	-1	-7,644	-1	-9,555	-1	-11,466	-1	-13,377	-2	-15,288	-2
TOTAL	1,127,803	1,152,272														

Table A.14 Turnover Impacts of More than One Additional Foodstore in New Barnet

Scenario	FORECAST TURNOVER 2008 (£000)	FORECAST TURNOVER 2011 (£000) NO NEW DEVELOPMENT	IMPACT ON TURNOVER 1,000SQM ADDITIONAL FLOORSPACE		IMPACT ON TURNOVER 1,500SQM ADDITIONAL FLOORSPACE		IMPACT ON TURNOVER 2,000SQM ADDITIONAL FLOORSPACE		IMPACT ON TURNOVER 2,500SQM ADDITIONAL FLOORSPACE		IMPACT ON TURNOVER 3,000SQM ADDITIONAL FLOORSPACE		IMPACT ON TURNOVER 3,500SQM ADDITIONAL FLOORSPACE		IMPACT ON TURNOVER 4,000SQM ADDITIONAL FLOORSPACE	
			£000	%	£000	%	£000	%	£000	%	£000	%	£000	%	£000	%
New Floorspace, New Barnet			11,200		16,800		22,400		28,000		33,600		39,200		44,800	
New Barnet (Existing Stores)	44,349	44,551	-4,164	-9	-6,245	-14	-8,327	-19	-10,409	-23	-12,491	-28	-14,573	-33	-16,654	-37
Chipping Barnet	21,423	21,614	-1,385	-6	-2,078	-10	-2,771	-13	-3,464	-16	-4,156	-19	-4,849	-22	-5,542	-26
Whetstone	18,999	19,189	-909	-5	-1,364	-7	-1,818	-9	-2,273	-12	-2,728	-14	-3,182	-17	-3,637	-19
North Finchley	34,514	34,567	-591	-2	-886	-3	-1,181	-3	-1,476	-4	-1,772	-5	-2,067	-6	-2,362	-7
Tesco, Colney Hatch Lane	65,760	66,219	-572	-1	-859	-1	-1,145	-2	-1,431	-2	-1,717	-3	-2,003	-3	-2,289	-3
Tesco Express East Barnet Rd	8,445	8,466	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Marks and Spencer, Whetstone	1,792	1,801	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Waitrose North Finchley	37,935	38,159	-67	0	-101	0	-134	0	-168	0	-202	-1	-235	-1	-269	-1
Waitrose Mill Hill East	21,869	22,361	-207	-1	-311	-1	-414	-2	-518	-2	-622	-3	-725	-3	-829	-4
Local Centres	6,567	6,658	-85	-1	-127	-2	-170	-3	-212	-3	-255	-4	-297	-4	-339	-5
Other	866,150	888,687	-3,220	0	-4,829	-1	-6,439	-1	-8,049	-1	-9,659	-1	-11,269	-1	-12,878	-1
TOTAL	1,127,803	1,152,272														

Table A.15 Turnover Impacts of Additional Comparison Goods Retail Floorspace in New Barnet

Scenario	FORECAST TURNOVER 2008 (£000)	FORECAST TURNOVER 2011 (£000) NO NEW DEVELOPMENT	IMPACT ON TURNOVER 1,000SQM ADDITIONAL FLOORSPACE		IMPACT ON TURNOVER 1,500SQM ADDITIONAL FLOORSPACE		IMPACT ON TURNOVER 2,000SQM ADDITIONAL FLOORSPACE		IMPACT ON TURNOVER 2,500SQM ADDITIONAL FLOORSPACE		IMPACT ON TURNOVER 3,000SQM ADDITIONAL FLOORSPACE		IMPACT ON TURNOVER 3,500SQM ADDITIONAL FLOORSPACE		IMPACT ON TURNOVER 4,000SQM ADDITIONAL FLOORSPACE	
			£000	%	£000	%	£000	%	£000	%	£000	%	£000	%	£000	%
New Floorspace, New Barnet			5,751		8,627		11,502		14,378		17,254		20,129		23,005	
New Barnet	6,397	7,127	-144	-2	-216	-3	-288	-4	-359	-5	-431	-6	-503	-7	-575	-8
Chipping Barnet	21,081	23,174	-791	-3	-1,186	-5	-1,582	-7	-1,977	-9	-2,372	-10	-2,768	-12	-3,163	-14
Whetstone	7,724	8,480	-230	-3	-345	-4	-460	-5	-575	-7	-690	-8	-805	-9	-920	-11
North Finchley	66,096	72,707	-474	-1	-712	-1	-949	-1	-1,186	-2	-1,423	-2	-1,661	-2	-1,898	-3
Edgware	48,360	55,101	-29	0	-43	0	-58	0	-72	0	-86	0	-101	0	-115	0
Brent Cross	559,883	628,333	-1,780	0	-2,670	0	-3,560	-1	-4,450	-1	-5,340	-1	-6,230	-1	-7,120	-1
Other	1,372,765	1,534,238	-2,303	0	-3,455	0	-4,607	0	-5,759	0	-6,910	0	-8,062	-1	-9,214	-1
TOTAL	**2,082,307**	**2,329,161**														

Summary

Summary of Key Issues and Opportunities:

- Baseline convenience retail expenditure capacity (to support additional floorspace) of £13.42m in 2011, rising to £19.59m by 2026
- Baseline comparison retail expenditure capacity (to support additional floorspace) of £1.57m in 2011, rising to £18.51m by 2026.
- Significant new retail floorspace in New Barnet risks adversely affecting the vitality and viability of competing centres (notably Chipping Barnet).
- Qualitative need for broader convenience retail offer; increased and broader comparison retail offer; banks/building societies; and higher quality retail/service provision.
- Opportunity for niche/specialist retail role;
- Under representation of multiple retailers.
- Capacity/need to enhance/broaden food/drink and evening economy offer.