

Town Centres Floorspace Needs Assessment

April 2009



Local Development Framework Evidence

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Preface

GVA Grimley Ltd was appointed in August 2008 to undertake the Barnet Town Centres Floorspace Needs Assessment. The majority of the research was carried out between September and October 2008. The household telephone interview survey was undertaken in September 2008 and the quantitative analysis prepared between October and November 2008. Although this work pre-dates revised economic forecasts including reduced expenditure growth rates forecast by Experian it provides a long term view. Therefore the longer term capacity forecasts will be more appropriate for local planning purposes.

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ABBREVIATIONS

AAP	Area Action Plan
BXC	Brent Cross Cricklewood
CAT	Competition Appeal Tribunal
CC	Competition Commission
DPD	Development Plan Document
EGi	Estate Gazette Interactive
FTE	Full Time Equivalent
GLA	Greater London Authority
IGD	Institute of Grocery Distribution
LB	London Borough
LDA	London Development Agency
LDF	Local Development Framework
OFT	Office of Fair Trading
PPG	Planning Policy Guidance
PPS	Planning Policy Statement
RSS	Regional Spatial Strategy
SFT	Special Forms of Trading
TCK	Town Centre Keepers
UCO	Use Classes Order
UDP	Unitary Development Plan
UKTS	United Kingdom Tourism Survey

1. INTRODUCTION

- 1.1 GVA Grimley was instructed by the London Borough of Barnet in August 2008, to carry out a Town Centres Floorspace Needs Assessment to inform town centre planning in accordance with guidance set out in Planning Policy Statement 6 (PPS6): Planning for Town Centres.
- 1.2 This study is a tool for the Council to make informed choices about the nature and extent of growth to be accommodated in the future. It provides robust and sound baseline evidence to inform the Local Development Framework (LDF). In particular, it will play a key role in guiding the spatial vision and strategic objectives of the Council's emerging Local Development Framework (LDF) in the context of anticipated growth over the next 17 years (2009 – 2026).
- 1.3 Based on our research, analysis and overall findings, the study identifies the performance of centres and the need for new floorspace up to 2026. However, we advise that forecasts beyond a five-year period should be interpreted with caution. We therefore recommend that the assessments be monitored and updated to take account of changes in retail and property market trends, and revised spend and population growth projections.

Aims and Objectives

- 1.4 The purpose of this work, as set out in the client's Brief is to undertake a study of all town centres and retail parks within the Borough to:
- Assess the existing supply and demand for retail, leisure and other main town centre uses and the role played by each town centre and retail park;
 - Assess the future demand for these uses and the potential future role and capacity of existing centres to accommodate new development to 2026, and to identify any centres in decline;
 - Identify potential development sites with prospects of delivery in the short and long term within the town centres and identify major planning applications that impact on town centres both granted and proposed;
 - Review the existing hierarchy and network of centres and if appropriate identify any deficiencies in the existing network;
 - Identify issues and alternative options for the future of the Borough's town centres;
 - Consider sustainability / changing shopping patterns (socio-economic trends).

1.5 Our assessment will specifically provide an estimate of the scale and nature of any changes in future provision in the light of:

- Existing and forecasts population levels;
- Housing and regeneration growth;
- Forecast changes in retail expenditure;
- Forecast improvements in the productivity and efficiency of retail floorspace;
- Changing forms of retail provision; and
- Possible increases or decreases in the trade draw from competing centres.

Approach

1.6 We have adopted a transparent approach to this study. The key steps of the analysis, data inputs and assumptions are clearly set out and justified. Our approach is also underpinned by the use of up-to-date household telephone interviews to help establish current shopping and leisure patterns, town centre catchments and market share estimates for both comparison and convenience goods.

1.7 The household telephone interview was undertaken in September 2008 and the quantitative analysis was carried out in October and November 2008. All of this work therefore pre-dates revised economic forecasts and in particular reduced expenditure growth rates forecast by Experian. Work on revised growth rates is still ongoing and as such this report has been finalised, albeit with the proviso that the capacity forecasts, particularly the short-term forecasts should be viewed with caution as the amount of expenditure growth predicted is unlikely to be forthcoming. In the longer term Experian predict expenditure growth will return and as such for local planning purposes the longer term capacity forecasts will be more appropriate.

1.8 This study also comprises a thorough overview of the existing town centre network in the Borough including detailed audits and qualitative health-checks which assess the relative vitality and viability of the Borough's major, district and local centres based, where possible, on the key performance indicators set out in PPS6 (paragraph 4.4). The site visits to inform the health check assessments were carried out in August-October 2008.

1.9 Although not undertaken as part of this piece of work, we have also included a summary of the Citizen's Panel Survey Report (2007) and the Consultation Workshops undertaken in October 2007 previously commissioned by the Council to inform their Town Centres Strategy.

Report Structure

1.10 This report draws together the results of our research, incorporating the findings of the detailed survey-based technical analysis and healthcheck assessments. The report is structured as follows:

- Section 2 summarises the national, regional and local policy framework including the current town centre hierarchy in the Borough.
- Section 3 considers current retail trends and specifically the key socio-economic trends which are likely to influence the evolution of town centres in the London Borough of Barnet.
- Section 4 reviews the London context within which Barnet's town centres sit, and assesses the influence of competing centres in the wider sub-region, and potential changes to the level of influence in the future.
- Sections 5 to 9 present our qualitative assessment of the role, attraction and performance of the main town centres in the Borough including a review of retail, leisure, cultural, tourism and office uses. We also include a review of the out-of-centre retail warehouse and foodstore provision.
- Section 10 sets out our baseline economic capacity projections for the Borough, focusing in particular on the capacity for further retail floorspace, with regard to identified commitments.
- Section 11 outlines our scenario testing of different growth and development options for the Borough.
- Section 12 identifies potential town centre development opportunities and assesses their potential to accommodate retail and other town centre uses over the short, medium and long term.
- Finally, Section 13 sets out our overall conclusions and recommendations on town centres in the Borough, including a Borough wide overview and a focus on individual centres.

2. POLICY CONTEXT

- 2.1 In this section, we examine the key points of relevance from national, regional and local planning policy; including PPS6, the London Plan, the London Borough of Barnet Unitary Development Plan and local area planning guidance for Cricklewood, Brent Cross & West Hendon and Grahame Park,. We have also considered emerging policies in the local development framework and the area actions plan prepared for Mill Hill East (adopted January 2009) and currently being prepared for Colindale.

National Policy Context

- 2.2 Government guidance makes clear that sustainable development is the core principle underpinning planning. Accordingly, PPS1 sets out a range of overarching policies aimed at facilitating sustainable patterns of urban and rural development through a number of initiatives, including the need to ensure that new development provides good access to jobs and key services for all members of the community.
- 2.3 PPS6 reaffirms the Government's commitment to protecting/sustaining town centres. Accordingly, the central objective of the guidance is to promote the vitality and viability of town centres by planning for the growth of existing centres and by promoting them as the focus for new development. Where growth cannot be accommodated in identified existing centres, local planning authorities should plan for an extension to the primary shopping area. It makes clear that where reversing the decline in centres is not possible, local authorities should consider reclassifying such centres within the retail hierarchy.
- 2.4 In allocating sites and assessing proposed development, PPS6 currently requires local planning authorities to assess the need for the development; identify the appropriate scale, apply the sequential approach, assess the impact on existing centres; and ensure locations are accessible and well served by a choice of means of transport. Local planning authorities, after considering these factors, should consider the degree to which other considerations such as physical regeneration, employment, economic growth and social inclusion are relevant.
- 2.5 The recent consultation on revisions to PPS6 follows the commitment in the Planning White Paper 'Planning for a Sustainable Future' to review the current approach in PPS6 to assessing the impact of development proposals in out-of-centre locations. The proposals reinforce the 'town centre first' approach and promote the vitality, viability and character of existing town centres.
- 2.6 The sequential test of site selection has been retained. However, the proposed changes to PPS6 will remove the 'needs test' for proposals outside town centres and introduces a new and broader 'impact test' which is intended to take better account of economic, social and environmental factors: the impact test will include issues of design quality and how the development will help to mitigate the

effects of climate change. The new impact test includes the requirement for applicants to consider the appropriateness of the scale of the development.

- 2.7 Despite these proposed alterations to PPS6, policy will continue to reinforce the principle that development should be accessible by a range of transport modes, that it should promote greater choice and retail diversity, and that it should encourage job creation in disadvantaged areas. The proposed changes strengthen references to competition consideration by reference to the promotion of competition between retailers as one of the Government's key objectives for town centres.
- 2.8 It had been anticipated that PPS6 would include a 'competition test' for large grocery stores reflecting the findings of the Competition Commission's investigation into the supply of groceries in the UK, and to promote consumer choice. However, an appeal lodged by Tesco was upheld in March 2009 and this has deferred the inclusion of a competition test (see sub-section 2.13-2.16 below). Apart from the Government's key objective to promote vital and viable town centres by planning for their growth and focussing new development and a wide range of services within them, other PPS6 objectives are to enhance consumer choice, support efficient, competitive and innovative retail and leisure sectors and to improve accessibility by a choice of means of transport.
- 2.9 Further points of relevance to this study, are:
- The need to establish a hierarchy of centres in each region and sub-region, with any change in the role and function of centres to be secured as part of the preparation of regional spatial strategies (RSSs) and through the preparation of development plans, rather than through individual applications.
 - The need to encourage a wider range of services and land uses for centres in decline;
 - The need to avoid over-concentration of growth in the highest level centres, and for regional spatial strategies to make clear strategic choices as to where growth is to be encouraged and decline managed;
 - The need to assess the quantitative need for additional floorspace for retail, leisure and office uses over the plan period and for five year periods within it, and the capacity of existing centres to accommodate additional development (in the case of long-term strategic policy guidance, a longer term forecasting horizon is required);
 - The need to improve public transport linkages to existing out-of-centre facilities, but not as a justification for their extension;
 - The need for development plans to set out the roles of different centres and explain how each centre will contribute to the local authority's overall vision for its area;
 - The need for development plans to encourage a diversification of uses in the town centre as a whole and to promote positive management of the evening economy, perhaps identifying distinct quarters where the evening economy is to be concentrated;

- The need for development plans to include policies which guide the appropriate scale of development to be encouraged, setting upper limits for the scale of developments that will be allowed in different types of centres;
 - The need for plans to positively allocate sufficient sites within and at the edge of town centres so as to meet anticipated demand for the next five years, anticipating the use of CPO powers where needed; and
- 2.10 PPS12 sets out the Government's policies on the preparation of local development documents, which are to compose the Local Development Framework. PPS12 indicates that the statutory Development Plan Documents (DPDs) will include a Core Strategy, site-specific allocations and Area Action Plans (AAPs).
- 2.11 The creation of additional floorspace within buildings was brought under control in May 2006 following consultation on the ODPM's report: 'Planning Control of Mezzanine and Other Internal Floorspace Additions' (March 2005). 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 within the 2004 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.
- 2.12 Changes to the Use Classes Order (UCO) took effect on 21st April 2005, enabling local authorities to have more control over managing town centre development while minimising the proliferation of pubs, takeaways and nightclubs. Cafes and restaurants have retained their A3 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 reclassified as Sui Generis.

Competition Committee: The supply of groceries in the UK market Investigation (April 2008)

- 2.13 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 recommends introducing a 'competition test' in planning decisions on proposed new grocery stores and extensions which will favour new entrants and grocery retailers over those which already possess a portion of the local market share. The Office of Fair Trading (OFT) will also be 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 will be required to notify the OFT of any acquisitions of grocery stores with a net sales area greater than 1,000 sqm.
- 2.14 The report also identifies and releases thirty restrictive covenants being used by retailers to restrict entry by competitors and prohibits future imposition of such covenants. Grocery retailers will also be required to relinquish control over land sites in highly-concentrated markets that have been identified as inhibiting entry by competing retailers. Finally, the report recommends the establishment of an

independent ombudsman to oversee and enforce a tightened Supermarkets Code of Practice to ensure compliance of the new regulations.

- 2.15 The Competition Commission does not make any recommendations for other changes to the planning system such as to the 'need' test or 'town centre first' policy. It also does not require any divestments of stores or land holdings. It believes that the recommended measures will be sufficient and proportionate in addressing its concerns about existing and future competition in local markets.
- 2.16 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 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.

Regional Policy Context

The London Plan (consolidated with alterations since 2004)

- 2.17 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.
- 2.18 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.
- 2.19 London has a complex network of town centres and five broad types have been identified; international, metropolitan, major, district and local and neighbourhood.
- **International Centres:** London has two such centres, Knightsbridge and the West End. International Centres are defined as major concentrations of globally attractive, specialist or comparison shopping.
 - **Metropolitan Centres:** There are 11 metropolitan centres but none within the London Borough of Barnet. Metropolitan centres are mainly in the suburbs and serve wide catchment areas covering several Boroughs and offer a high level and range of comparison shopping.
 - **Major Centres:** There are 35 major centres, including Edgware in the London Borough of Barnet. They are characteristically important shopping and service centres with a Borough-wide catchment. Their attractiveness for retailing is derived from a mix of both comparison and convenience shopping.
 - **District Centres:** London has 146 district centres. These include North Finchley, Chipping Barnet, Finchley Church End, East Finchley, Temple Fortune, Golders Green, Whetstone, Hendon Central, New Barnet, Brent Street and Mill Hill. Cricklewood and Colindale - The Hyde are district centres that fall within both the London Borough of Barnet and the London Borough of Brent. Burnt Oak falls within the London Boroughs of Barnet, Brent and Harrow. District Centres have traditionally provided convenience goods and services for more local communities to meet their day-to-day needs. 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.
 - **Local and Neighbourhood Centres:** It is recognised that there are over 1,200 neighbourhood and more local centres in London which provide services for local communities and are of cumulative strategic significance. Barnet has 10 neighbourhood centres and a further 54 local centres and parades.
- 2.20 In addition to these town centres, London contains a **Regional Shopping Centre** – Brent Cross, which serves a regional role but is not currently a town centre and in policy terms is considered separately.
- 2.21 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. It notes that the sub-regional development framework will guide the evolution of Brent Cross into an integrated town centre, which should not compromise
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the potential of Wood Green, Wembley, Harrow and other centres, to provide sustainable access to higher quality goods and services. A development framework for the North London sub-region was published in May 2006 to further guide development although it is not a statutory document.

- 2.22 In accordance with national planning policy guidance, Policy 3D.2 states that UDP policies should assess retail capacity and need. 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.
- 2.23 The London Plan proposes a regional growth corridor following the transport route along Thameslink, A5 and M1 from London to Luton and Bedford. Within this strategic corridor Barnet's major development sites are already identified and provide a significant element of growth.

GLA Floorspace Needs in London

- 2.24 The GLA have recently published their report on Consumer Expenditure and Comparison Goods Floorspace Need in London (March 2009). This was carried out by Experian in 2008 and updates previous work on comparison goods retailing in London, carried out in 2004. The 2008 study produces comparison goods capacity forecasts for the LB Barnet through to 2026 and shows a similar quantum of floorspace capacity to the GVA Grimley forecasts in this study where similar assumptions have been made. Table 2.1 summarises the GLA comparison goods floorspace requirements compared with the GVA capacity forecasts detailed in Sections 10 and 11 of this report.

Table 2.1: GLA and GVA Comparison Goods Capacity Forecasts

	2011 (sqm)	2016 (sqm)	2021 (sqm)	2026 (sqm)
GLA Flsp, Gross	22,520	57,538	104,967	160,614
GLA Flsp, Net @ 75%	16,890	43,153	78,725	120,460
GVA Baseline Flsp Net	11,356	47,917	81,024	114,531

Source: GLA, March 2009

- 2.25 The Experian analysis, like the previous work, provides useful baseline data indicating population change and comparison goods expenditure and growth projections on a London-wide base, and for individual sub-regions and smaller areas. The study is also helpful in understanding the scale and implications of major schemes in the pipeline. Significantly, however, the work focuses solely on quantitative considerations and has little regard to the issue of quality.
- 2.26 In contrast, this Town Centres study takes into consideration the trading performance of retail destinations through the results of the Household Telephone Survey. Unlike the Experian gravity model, the baseline evidence and assumptions underpinning the Barnet Town Centres study are

based to a large extent on our assessments of the quality, role and function of the main study centres. The incorporation of commitments into our quantitative model (discussed in later sections) has also been informed by our more detailed understanding of the composition of schemes, distribution, accessibility, the health of the current network of centres and the consequent impact on those centres. Our manual model has therefore been specifically developed to ensure quantitative, qualitative and accessibility considerations can all be taken into account.

- 2.27 This detailed approach was not possible for the GLA study, because it was more strategic in nature. While Experian's sensitivity analysis does highlight a range of possible requirements across London at a strategic level, it does not provide the detailed evidence needed by local planning authorities for the preparation of LDF policies, or to guide specific allocations of new comparison floorspace development. This study has consequently been commissioned to ensure a more robust and sound qualitative and quantitative assessment at a more localised level, in order to feed into informed sensitivity testing and, eventually, recommendations for development at the local level.

North West London Retail Study (April, 2004)

- 2.28 This study was undertaken on behalf of the Cricklewood/Brent Cross Development Framework steering group to assess the appropriateness of Brent Cross/Cricklewood as a location for further retail growth and its role relative to other centres in the North and West sub-regions of London. The study focuses on comparison shopping activity in the north/west London sub-regions to assess where future comparison shopping needs are likely to arise by 2011. Brent Cross was identified as the most significant comparison shopping destination within the study area, but was found to retain only a small proportion of available expenditure with significant leakage to the West End and other destinations.
- 2.29 Forecast expenditure growth analysis identified a global capacity of £1.124bn to accommodate additional comparison goods floorspace and therefore more than sufficient capacity to support the scale of retailing (55,000 sqm gross) envisaged at Brent Cross in the emerging Development Framework. Taking account of pipeline schemes and limited opportunities to accommodate new development to meet the identified need, the provision of c.55,000 sqm additional comparison goods floorspace at Brent Cross was found to offer the greatest potential to achieve more sustainable shopping patterns and maximise contributions from a key regeneration area.
- 2.30 In the context of the scale of surplus capacity generated in the study area to 2011, the strategy for Brent Cross/Cricklewood was considered consistent with maintaining and enhancing existing centres and the pre-eminent role of London.

Local Policy Context

London Borough of Barnet Unitary Development Plan (Adopted May 2006)

- 2.31 The Barnet UDP was adopted in May 2006. The Council are currently preparing their LDF which will eventually replace the UDP; however until then the Council have applied to the Secretary of State to save certain policies in the UDP. The majority of policies relevant to this study have been extended however we acknowledge three policies which are not to be saved in the most recent application to the Secretary of State. These include **GTCR3**, **L2** and **L8**. We have continued to make reference to these policies in the following text as they are included in the adopted UDP.
- 2.32 Town centres and retailing are considered crucial to the social, economic and environmental wellbeing of the Borough and the Council is committed to their regeneration and revitalisation. **Policy GTCR1** seeks to direct new retail and other major trip-generating development to sustainable locations which will enhance the vitality and viability of town centres. **Policy GTCR2** seeks to ensure that all residents have access to a wide range of goods and services in their closest town centre. Policy **GTCR3** strives to create the highest quality environments in town centres.
- 2.33 The UDP sets out the Borough's retail hierarchy which comprises one regional shopping centre (Brent Cross), one major centre (Edgware), 14 district centres, five local centres and ten neighbourhood centres. It also notes that there are a number of out-of-centre retail facilities that do not form part of the town centre network. Table 2.2 sets out the hierarchy of centres.

Table 2.2: Retail Hierarchy in Barnet

Regional Shopping Centre	Major Centre
<ul style="list-style-type: none"> • Brent Cross 	<ul style="list-style-type: none"> • Edgware*
District Centres	
<ul style="list-style-type: none"> • Brent Street • Chipping Barnet • Church End Finchley • East Finchley • Mill Hill • Colindale – The Hyde* • Temple Fortune 	<ul style="list-style-type: none"> • Burnt Oak* • Cricklewood* • North Finchley • New Barnet • Whetstone • Golders Green • Hendon Central

Local Centres

- Childs Hill
- East Barnet
- Friern Barnet
- Market Place
- West Hendon

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
- Holders Hill Circus

*these centres are part-divided between Barnet and neighbouring London Boroughs

- 2.34 The UDP notes the importance of Brent Cross as a regional retail destination in North London.
- 2.35 New retail development is directed towards town centres and specifically existing buildings within the primary and secondary frontages (**Policy TCR1**) in accordance with the sequential approach. The UDP identifies various sites for future retail development, which the Council will prioritise (**Policy TCR2**) and keep under review (**Policy TCR3**).
- 2.36 Proposed extensions and changes of use to existing out-of-centre supermarkets and other retailing, leisure, entertainment and office development, will be considered against the same policies as proposals for new buildings (**Policy TCR7**). Proposals for out-of-centre retail development of over 2,500 sqm must be accompanied by a retail impact assessment, and will be assessed against their immediate and long-term impact on the vitality and viability of existing town centres. When granting planning permission, 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-town centre retail and major trip-generating development will also be considered against their public transport accessibility and their traffic impacts.
- 2.37 The council considers that the vitality and viability of its town centres can be maintained and enhanced by ensuring the retention of a strong retail function, while also accommodating a diverse range of uses. Primary and secondary frontages are identified in all of the Borough's major and district centres, with the exception of New Barnet and Whetstone. They seek to retain the core of retail activity at the heart of these centres. **Policy TCR10** states that within primary retail 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; if it would detract from the established retail character; or if the proposed use does not fall within Class A2, A3, A4 or A5. **Policy TCR11** is a similar policy in respect of Secondary Frontages where the proportion of and vacant uses does not fall below 65% or

- 55% if the proportion of vacant units is above 15%; or the proposal would not generate sufficient pedestrian activity leading to a period of inactivity.
- 2.38 The UDP notes that some edge-of-centre locations contain shops that may be close to a town centre but remain distinct from it, due, for example, to their separation from the main centre by larger roads or non-retail frontages. The UDP recognises that while excluded from the town centre, these shops make an important contribution to local shopping facilities and in these retail areas Policy TCR19 will apply.
- 2.39 Policy TCR19 (Neighbourhood Centres, Shopping Parades and Local Shops) states that the change of use from a shop to another use will be strongly resisted unless it can be demonstrated that there will be no significant diminution of local shopping facilities and a range of other criteria.
- 2.40 Other relevant policies in the UDP include:-
- **Policy TCR12** – Evening Uses in Town Centres – encourages a range of quality facilities in town centres;
 - **Policy TCR13** – encourages residential uses in town centres;
 - **Policy TCR14** – permits minicab offices at transport interchanges or adjacent to primary frontages;
 - **Policy TCR15** – car showrooms;
 - **Policy TCR16** - encourages markets and recognises their contribution towards diversity and vitality in town centres;
 - **Policy TCR17** – North Finchley Town Centre Tally Ho Corner Special Policy Area;
 - **Policy TCR18** – encourages a mix of uses in town centres including residential accommodation;
 - **Policy TCR21** – seeks to enhance the environmental quality of town centres; and
 - **Policy TCR22** – Design of new retail developments.
- 2.41 There are several tourism attractions including the RAF Museum in Colindale - The Hyde and the arts depot in North Finchley. The UDP sets out to improve the quality of leisure, recreation and tourist facilities for the benefit of residents and visitors and will promote the development of new or improved facilities.
- 2.42 **Policy L1** states that the Council will refuse development proposals resulting in the loss of arts, culture and entertainment facilities to other uses except where new facilities of at least equivalent quality and quantity are provided or where there is an overriding community need for another use. The preferred location for arts, culture and entertainment facilities is in the Borough's town centres (**Policy L2**). The preference for tourist facilities and hotels is also town centres (**Policy L7** and **L9**).
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- 2.43 The UDP devotes a specific chapter to the Cricklewood, Brent Cross and West Hendon Regeneration Area. This area is considered to present a unique, strategic opportunity in London and the UDP promotes the creation of a new mixed-use town centre with new homes and transport links.
- 2.44 Cricklewood (a District Centre) and West Hendon (a Local Centre) both suffer from the adverse effects of traffic on the A5 and have high vacancy rates. The UDP states that through development proposals for the wider area, the Council wishes to secure social, environmental and economic benefits for these town centres. It is also noted that the regeneration of the area provides an opportunity for the transformation of the Brent Cross Shopping Centre in a sustainable manner with a maximum of 55,000 sqm of comparison retail floorspace. **Policy C6** (Brent Cross New Town Centre) states that the Council will support additional retail development at Brent Cross as part of a new town centre extending north and south of the North Circular Road (A406), subject to various criteria.

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

- 2.45 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 wellbeing in the Borough. It has also been prepared in light of the Council's long-standing aspirations to enhance several town centres, such as North Finchley, Edgware, Chipping Barnet, Finchley Church End, Whetstone and New Barnet.
- 2.46 The strategy recognises that the Council's role is not to take an interventionist approach to town centres, as ultimately it is the private sector that will invest most and will determine the amount and types of retail activity. However, it acknowledges that the Council has a key role to play in creating the right environment for private sector investment. To this end, the Council will focus on eight objectives:-
- Improving the appearance of Barnet's town centres;
 - Ensuring the effective control of parking arrangements;
 - Effective management of development opportunities and changes in planning use;
 - Regulating the street trading environment;
 - Maximising take-up of waste contracts;
 - Improving resident's feeling of safety and security;
 - Improving access to information on town centres; and
 - Ensuring consistency with other Council programmes.

London Borough of Barnet: Local Development Framework

Core Strategy Issues and Options (June 2008)

- 2.47 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.
- 2.48 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.
- 2.49 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.
- 2.50 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.
- 2.51 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.
- 2.52 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?

Cricklewood, Brent Cross and West Hendon Regeneration Area Development Framework (December 2005)

- 2.53 The Framework outlines the proposals and policies to manage the significant development of the regeneration area involving up to 10,000 new homes, a commercial district and a new town centre with major shopping and leisure development as part of a comprehensive mix of land uses.
- 2.54 The boundary of the regeneration area is defined to the west by the A5 Edgware Road and to the east by the A41 Hendon Way. Hendon Station is the northern most point and the A407 Cricklewood
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Lane the southern most point. The regeneration area includes Brent Cross shopping centre, the district centre of Cricklewood and West Hendon local centre.

- 2.55 The Framework sets out in detail the appropriate land use mix for the area which includes approximately 55,000 sqm comparison retail floorspace; 20,000 sqm convenience shopping; 27,000 sqm leisure space; two new hotels; up to 420,000 sqm business space; and in the region of 10,000 new homes.

Brent Cross Cricklewood Planning Application

- 2.56 In March 2008, an outline planning application was submitted to the London Borough of Barnet for the comprehensive regeneration of the Brent Cross Cricklewood Area. The site covers an area of 151 hectares and includes the Brent Cross Shopping Centre to the north, the A41 and Brent Cross London Underground station to the east, Cricklewood Lane to the south and the A5 to the west. The project is expected to create 7,500 homes, substantial jobs and will be developed around a new town centre. The revised Retail Report (November 2008) sets out the proposals involving approximately 111,000 sqm gross of retail floorspace (a net increase of 75,665 sqm), 26,000 sqm gross of leisure uses, 34,600 sqm gross of community uses and a hotel and 395,300 sqm gross office floorspace. It is a complex and ambitious regeneration scheme which, if approved, will be developed over the next twenty years.

Colindale Area Action Plan – Preferred Options (October 2008)

- 2.57 This Development Plan Document will set out comprehensive proposals and policies for the development of Colindale, incorporating major redevelopment opportunities and infrastructure changes. The Council consulted on the Preferred Options for the AAP at the end of December 2008 and it is anticipated that the final report will undergo Examination in Public at the end of 2009.
- 2.58 Colindale Northern Line station provides quick and direct access to central London but major barriers surrounding the area have created a rather isolated community. The area has been identified as an Opportunity Area in the London Plan and the AAP aims to stimulate development interest and provide a framework for implementing regeneration initiatives. 10,000 new homes are proposed in Colindale with 500 new jobs. The scale of new residential development in Colindale implies the need for additional retail floorspace and services. The AAP therefore plans for a new local neighbourhood centre with services to support the planned growth in the area.

Mill Hill East Area Action Plan (Jan 2009)

- 2.59 Mill Hill East is identified as an Area for Intensification in the London Plan and the Area Action Plan sets out the Council's policies and proposals to stimulate the development and regeneration of the area. Mill Hill East comprises approximately 31 hectares of land which will enable the delivery of 2,000 new homes, as well as employment uses, a new local high street and community hub with around 1,000 sqm of retail floorspace, a primary school as well as community and health facilities.

The AAP underwent an Examination in Public, was found sound by the Inspector's Report in December 2008 and finally adopted by the Council in January 2009.

Previous Research

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

- 2.60 In Summer 2007, the Council undertook a combined postal and online survey of local residents to ascertain the use of the Borough's town centres for shopping. The survey was designed to identify various shopping patterns including reason and frequency of visits; mode of travel; visitor satisfaction; the level of use of evening leisure facilities and participation in late night shopping.
- 2.61 The survey obtained a 46% response rate which identified Brent Cross as the overall most frequently visited centre although for main food shopping, North Finchley was the most popular destination. The main driver of visits was the proximity of a centre to a residents' home, presuming that a most frequently visited centre is the nearest one. In terms of accessibility the majority of respondents were satisfied with access by road although a slightly lower proportion were satisfied with access to public transport and less than 50% were satisfied with parking facilities. The car was identified as the most popular method of travel, followed by walking. Fewer respondents use public transport to travel to their most frequently visited centre.
- 2.62 Across all centres satisfaction with the range of shops, cafes and restaurants was low to moderate indicating that residents would like to see some improvement in these areas. The survey identified 66% use evening leisure facilities and 58% partake in late night shopping, the majority of the latter being at Brent Cross Shopping Centre.
- 2.63 We have reviewed the results of the Council's survey and recognise the various consumer views and behaviour identified. However, we do not directly draw upon the raw data as part of our own qualitative assessment for this study.

Stakeholder Events (October, 2007)

- 2.64 In October 2007, the Council commissioned an independent research agency to consult with residents, businesses and ward members on individual views of their local centres and how they could be improved. This qualitative piece of research focused on the main centres of Chipping Barnet, Edgware and North Finchley and two consultation events were undertaken in each centre. The first was a qualitative workshop involving business, residents and ward members and the second involved a group discussion just with residents.
- 2.65 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 across all three centres.

- 2.66 We have reviewed this piece of research and acknowledged the various local views and needs identified for the centres. However, we have not directly drawn upon the raw data from this piece of research as part of our own qualitative assessment for this study.

Summary

- 2.67 National planning policy guidance provides the framework for developing Development Plan town centres policies, which are tailored to the specific circumstances of the London Borough of Barnet. The overarching policy thrust is to sustain and enhance the vitality and viability of existing centres, wherever possible, and to plan positively.
- 2.68 The London Plan seeks to create a balanced network of vital and viable town centres, with appropriate levels of development depending on the centre's role within the network and its catchment. The London Plan proposes a regional growth corridor following the transport route along Thameslink, A5 and M1 from London to Luton and Bedford. Within this strategic corridor Barnet's major development sites are already identified and as such, there are significant opportunities for additional retail provision.
- 2.69 The local policy context seeks to improve and enhance the existing centres in the Borough, to ensure they meet the needs of growing demand. The UDP support for new retail development is in accordance with the town centre hierarchy and includes tailored policies to address significant planned growth at Cricklewood, Brent Cross and West Hendon. The Council's Three Strand Approach further encourages the enhancement of centres and exploration of opportunities for new growth. A planning framework has been prepared to supplement the policies and manage the implementation of the development and an outline planning application for the Brent Cross/Cricklewood parts of the wider regeneration area has been received by the Council. Additional planned growth at Colindale and Mill Hill East are also subject to Area Action Plans which will effectively shape future development in these areas.
- 2.70 Public consultation has been undertaken highlighting various consumer views and behaviour as well as desires for certain improvements in selected centres. The Council recognises the significant opportunities for growth and enhancement of centres in the Borough and the necessity to ensure that emerging planning policies are appropriate to encourage and manage future development.

3. NATIONAL TRENDS IN TOWN CENTRE USES

- 3.1 To put our assessment of the quality of existing provision and the need for additional floorspace into context, it is relevant to consider the wider economic and social trends likely to influence retailing in the London Borough of Barnet. A number of trends are likely to have a bearing on the future pattern of retail provision and the opportunities arising from development proposals. This section examines key trends and drivers for change in the retail industry. Of particular relevance to Barnet, drawing from a range of published data sources, including research by Verdict Analysis, Mintel and the New Economics Foundation.

Demographics

- 3.2 Over the last 15 years 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.
- 3.3 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%. 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.

Income and Expenditure

- 3.4 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.

- 3.5 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.
- 3.6 Non-store retail sales, 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).
- 3.7 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.

Sales Density Increases

- 3.8 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, with much lower growth in sales densities for convenience goods. The future growth in sales densities will undoubtedly be affected by the way in which retail space evolves and is used in the future.
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Employment

- 3.9 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

- 3.10 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.
- 3.11 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 have, therefore, 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.
- 3.12 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.
- 3.13 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. However, it is also recognised that individual retailers' business models are also relevant. Disaggregation of a retailer's proposed store does not now need to be considered if the operator can demonstrate it would adversely affect their business model.

Size of Units

- 3.14 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).
- 3.15 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

- 3.16 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

- 3.17 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.
- 3.18 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.

- 3.19 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

- 3.20 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.
- 3.21 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.
- 3.22 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.
- 3.23 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.

Tourism

- 3.24 Tourism is one of the largest industries in the UK. In 2006 expenditure for both inbound and domestic tourism reached approximately £84 billion. Over 2 million jobs are sustained by tourism activity in the UK, either directly or indirectly, and there are around 1.45 million jobs directly related to tourism activity (5% of all people in employment in the UK). According to UKTS, UK residents took 123.5 million trips in 2007 and spent over £21 billion. This represents a 2% decrease in trips on 2003 and a 1% decline in expenditure over the same period. However, overseas visits to the UK are increasing, with a 29% increase between 2000 and 2007 and an increase in spending of 25%.
- 3.25 Some of the key factors influencing tourism trends are:
- Growing disposable incomes, increased overseas travel, supplemented by short breaks in Europe and the UK;
 - Increasing expectations of product quality;
 - An ageing population with more flexibility for off-peak travel;
 - Changing consumer behaviour with more frequent short breaks and special interest holidays;
 - Decreasing interest in traditional UK seaside holidays with more interest in urban destinations;
 - The strength of the Pound / Euro;
 - Growing environmental concerns leading to more interest in walking, cycling, wildlife and remoter locations;
 - Use of Internet to research, plan and make bookings direct with businesses at the destination; and
 - A more volatile global environment, which can increase the attractiveness of UK domestic products but also lead to increased competition for our core markets.
- 3.26 National visitor trends in 2007 (published September 2008) reported that the 1,348 visitor attractions in England showed an overall 3% increase in visitor admissions in 2007. A visitor attraction may be defined as “an attraction where it is feasible to charge admission for the sole purpose of sightseeing¹”. The majority of categories showed growth in 2007, with a particularly strong increase in visits to visitor/heritage centres (+12%) and country (+8%). Museums and art galleries have remained strong following 8% growth recorded in 2006 with 3% growth in 2007. Outdoor attractions have also maintained a relatively strong level of visits despite the relatively wet weather in 2006 and 2007.

¹ VisitBritain (2007) Visitor Attractions in England – 2007 Annual Report

Summary

- 3.27 Incomes and expenditure have shown strong growth over the last 20 years, with retail expenditure growing faster than incomes. This has seen corresponding increases in sales densities within existing retail floorspace, which has also been driven by factors such as high value space efficiency and longer opening hours. Increased car ownership has resulted in greater household mobility and therefore the choices for shopping centres to visit and the distances that can be travelled are much greater. Internet shopping has grown phenomenally in the last few years, albeit from a low base, and looks set to continue in certain sectors.
- 3.28 The recent credit crunch has had massive impacts on the retail sector. 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.
- 3.29 The foodstore operators have continued to evolve their formats and offer. With restrictions on out-of-centre stores growing, and changing socio-economic trends, several large operators have returned to the High Street with small convenience stores. Operators are also seeking to extend their comparison goods offer, turning stores into variety or mini department stores. This trend in out-of-centre locations could pose a threat to smaller centres, where the large out-of-centre stores become one stop shopping destinations negating trips to town centres.
- 3.30 There has been a continued polarisation towards larger centres and the provision of larger stores in these larger centres. Where smaller centres have been unable to diversify their offer or create niche markets they have suffered. The focus on urban renewal has increased demand for town centre sites for a wider range of land uses.

4. SUB-REGIONAL CONTEXT

- 4.1 This section compares the role of the main centres in the London Borough of Barnet with other centres in the wider sub-region. It analyses the influence of key competing centres on retail centres in Barnet, particularly Brent Cross, Edgware and North Finchley. The analysis draws extensively on the household telephone survey data, which underpins the whole study. We have also drawn on other data sources including PROMIS, Javelin Retail Ranking, Focus Property Intelligence database and EGi. Our analysis of each centre is backed up with the tables set out in **Appendix 1a-1c**.
- 4.2 Our assessment of each of the competing centres identifies the main retail offer and floorspace provision, and the extent to which this is likely to change and influence shopping patterns in the sub-region in the future. The household telephone survey highlights the main centres that compete with Brent Cross, Edgware and North Finchley, which include Central London, Watford, Harrow, Enfield and Borehamwood. The location of these centres in relation to the centres in Barnet is illustrated on Plan 1.
- 4.3 As the survey was undertaken in September 2008, prior to the opening of the Westfield Centre in Shepherds Bush on 30th October 2008, we have not been able to identify the level of trade drawn to the new shopping centre. There is also no retail data available for the centre at present so whilst we acknowledge that there is likely to have been some impact on Brent Cross and other centres in Barnet, we are unable to comment on the extent of this at present.
- 4.4 Shopping patterns derived from the household telephone survey enable us to calculate the amount of comparison goods expenditure that each competing centre draws from the defined study survey area. As well as strength of retail offer, this indicator takes into consideration accessibility and distance from the study catchment area by car. The total expenditure leaking to these centres is highlighted in Table 4.1 and illustrated on Plan 12.

Table 4.1: Study Area Comparison Goods Trade Draw: Key Competing Strategic Centres

Centre	Comparison Goods Trade Draw (£000)	% of Total Available Comparison Goods Expenditure
BRENT CROSS	570,348*	26.6
Central London (West End)	302,970	14.2
NORTH FINCHLEY	81,852	3.8
Watford	75,238	3.5
EDGWARE	49,710	2.3
Borehamwood	45,563	2.1
Harrow	36,274	1.7
Enfield	33,150	1.5
Wood Green	22,598	1.1
<i>Other</i>	<i>922,719</i>	<i>43.5</i>

Source: GVA Household Telephone Survey, September 2008 *does not include Brent Cross South Retail Park

- 4.5 From the study centres, it is evident that Brent Cross has the greatest draw, approximately £570m of comparison goods expenditure, which equates to 26.6% of the total available from within the survey area. This is greater than Central London which draws 14.2% and reinforces the dominance of Brent Cross within the survey area. All other centres have a much lesser draw, but of these North Finchley has a highest, attracting nearly £82m or 3.8% which is greater than Watford which draws £75m or 3.5% expenditure from the survey area. Edgware has a lower trade draw, almost reaching £50m (2.3%) which is just slightly greater than Borehamwood (2.1%). The remaining centres of Harrow, Enfield and Wood Green are less influential with each drawing less than 2%.
- 4.6 Plans 3-11 show the comparison goods trade drawn to each of the key centres in Barnet and competing centres from each zone in the household telephone survey. Plan 3 demonstrates the dominance of Brent Cross which extends across all zones although most noticeably over Zones 4, 7, 10-11 as well as Zones 5 and 8. Plan 6 highlights that Central London has a similar influence extending over all zones although the level of market share in each zone is less intense. Watford (Plan 7) also has an extensive, albeit relatively weak influence over Zones 1-6 and 8-14. As expected, the greatest market share derives from Zones 12 and 14 which are closest in proximity. Enfield and Wood Green possess broadly the same level of influence over zones in the eastern side of the survey area, whilst Harrow has limited influence over zones in the west.
- 4.7 We have not identified Wembley as a notable competing centre at present but we do acknowledge that there is a reasonable amount of retail floorspace in the pipeline. The London Borough of Brent granted Quintain Estates and Development Plc outline permission in 2004 for a major mixed-use development scheme covering 42 acres around Wembley Stadium. The retail element of the proposals involves c. 47,000 sqm gross floorspace, including shops, restaurants and bars. We are also aware of c.7,440 sqm gross net additional retail floorspace as part of the 12,540 sqm Wembley

Central Square development. If these proposals are delivered it is likely that Wembley will have a greater impact on centres in Barnet in the future.

Profile of Competing Centres

- 4.8 The vitality rank position of each of the competing centre has been derived from Javelin (Venue Score). It is evident from **Appendix 1a** that London (West End) has the highest rank position reflecting its strength as a renowned international shopping destination. It has the 9th highest score in the UK, after places such as Nottingham (6), Brighton (7) and Leeds (7). Watford is also ranked relatively high at 37th place. In comparison Brent Cross is ranked 140th which is somewhat lower than other outer-London shopping centres such as Bluewater and Lakeside which are ranked 28th and 71st respectively. It also falls below Harrow which is ranked 118th. North Finchley and Edgware are similarly ranked at 304th and 315th which suitable reflects their role. Borehamwood is ranked lower still at 812th. The opening of Westfield since the survey was undertaken is likely to have had some impact on Brent Cross' overall market share.
- 4.9 In terms of retail floorspace, London (West End) again is the most dominant centre in this category with a retail floorspace in excess of 1 million sqm gross. Watford is the largest of the sub-regional centres comprising 144,678 sqm, followed by Wood Green with 107,768 sqm and Harrow with 99,824 sqm. Comprising 83,528 sqm gross² Brent Cross has a greater floorspace than both Enfield (57,284 sqm) and Borehamwood (57,080 sqm). Edgware and North Finchley are the smallest centres in terms of retail floorspace with 17,990 sqm and 10,490 sqm respectively.
- 4.10 Prime retail rents in Edgware and North Finchley are currently £1,023 and £753 per sqm respectively. Aside from Borehamwood, retail rents for these centres are lower than in the other centres in the sub-region. Wood Green, Harrow and Enfield have achieved prime retail rents between £1,400 and £1,600 per sqm and rents in Watford have reached £3,337 per sqm. In line with its international status Central London has the highest prime retail rents at £5,095 per sqm but retail rents at Brent Cross are strong at £4,736 per sqm.
- 4.11 The Table in **Appendix 1a** demonstrates that there is a general pattern of increasing rental levels across the sub-region between 2005 and 2007. Edgware, North Finchley and Borehamwood are the only centres where retail rents have remained static.
- 4.12 The strength of competing retail centres is also demonstrated by the level of retailer demand. In autumn 2008, Watford had the highest number of requirements with 78 demands for space. This is higher than the 54 requirements for Brent Cross and 53 for Central London. Harrow and Enfield have similar levels of demand with 44 and 42 requirements respectively. Wood Green has 18 requirements and Edgware has 14 requirements, greater than 10 requirements for Borehamwood. North Finchley has the least demand with just 7 requirements.

² Brent Cross Cricklewood Planning Application: Revised Retail Report (November, 2008)

- 4.13 Drawing on the above indicators and our review of the competing centres we have benchmarked the centres against all key indicators to further assess their relative position and role. Table 4.2 outlines the total rank score achieved for each centre, representing overall performance across the range of key indicators and demonstrates the relative positions of Brent Cross, Edgware and North Finchley in relation to the wider sub-region. The full ranking tables are included in **Appendix 1d**.

Table 4.2: Benchmarking of Centres

Centre	Rank Score
Central London (West End)	43
Watford	39
Brent Cross	36
Harrow	30
Wood Green	26
Enfield	25
Edgware	13
North Finchley	10
Borehamwood	8

Source: GVA Household Telephone Survey, September 2008

- 4.14 It is further evident from the ranking of centres that Central London is the key dominant centre, closely followed by Watford which ranks higher than Brent Cross. Edgware and North Finchley are positioned much lower and beneath Harrow, Wood Green and Enfield. Borehamwood is the lowest ranked centre in the sub-region.
- 4.15 The analysis above has reviewed the current position of Brent Cross, Edgware and North Finchley within the sub-regional town centre network. Although Brent Cross is physically smaller than other centres is it a strong centre with high rents and a good level of retailer demand for space. Edgware and North Finchley are lower order centres compared with Harrow, Wood Green and Enfield. We have taken the analysis a stage further and also reviewed developments in the pipeline in competing centres which could affect the centres in the future as a result of an enhance retail offer and a consequent increase in trade leakage. Full details of the pipeline schemes are set out in **Appendix 1b** which demonstrates that the majority all of the centres have some improvements in their retail offer coming forward.
- 4.16 In Watford, planning permission has been granted for circa 1,020 sqm gross additional retail floorspace as part of the redevelopment of existing units at 132-136 High Street. There are also proposals in the pipeline to redevelop Charter Place shopping centre for retail, leisure and community uses. The centre has become rundown and outmoded and the Council are currently seeking a development partner to undertake the scheme. There has also been some discussion over a residential-led scheme to the rear of Watford Junction Station which would also include some element of office and community uses and a small amount of retail. An application relating to this is

- anticipated. In terms of development currently coming forward there is only limited additional retail floorspace which will not greatly impact on LB Barnet.
- 4.17 There are various schemes in the pipeline in Central London. The most notable scheme coming forward on Oxford Street involves the creation of circa 4,366 sqm gross additional retail floorspace as part of the Park House scheme adjacent to the Primark unit. The development is currently under construction and due for completion in 2011. This will enhance the quality of the retail offer towards this end of Oxford Street although we do not consider this likely to significantly alter shopping patterns from the survey area nor have a great impact on centres in Barnet.
- 4.18 In Harrow, there are presently no major developments in the pipeline for the town centre, however Tesco have an outstanding consent to extend their edge-of-centre store at Station Road and Sainsbury's are also looking to develop a new store (up to 2,787 sqm gross) as part of a mixed development with 160 dwellings off Neptune Road just west of the town centre. An application had been submitted in relation to the latter, but this was refused by the Council in May 2008.
- 4.19 London Borough of Harrow have granted consent for circa 1,580 sqm gross retail floorspace in ground floor units as part of the Bradstowe House development which also includes a health club and residential dwellings. An application has also been submitted for the mixed use redevelopment of the former Post Office and depot on College Road to include approximately 1,020 sqm gross additional retail floorspace. The site has long been identified by the Council as suitable for major redevelopment. Finally, Harrow College are also looking to develop a new College with a scheme which will likely involve an element of retail floorspace. However, in the present economic climate it is likely that this scheme may be put on hold. In view of the level of development planned, we do not consider this to have a great impact on LB Barnet.
- 4.20 There are two approved schemes in the pipeline for Wood Green. These include proposals to extend to The Mall shopping centre to create circa 10,000 sqm net over three levels for a new Debenhams department store. There is also a residential-led scheme under construction on Lordship Lane which will include approximately 1,210 sqm net additional floorspace as well as some leisure provision.
- 4.21 We have not identified any proposals currently in the pipeline for Enfield town centre, however there is full planning consent for an additional 1,400 sqm retail unit at Enfield Retail Park. We have not identified any proposals currently in the pipeline for Borehamwood.
- 4.22 In addition to the above, the new Westfield Shopping Centre at White City opened on 30th October 2008. The centre comprises circa 150,000 sqm net floorspace and includes five anchor stores (Debenhams, Marks & Spencer, House of Fraser, Next, and Waitrose), 265 retail units as well as a range of food and drink outlets and other service and leisure facilities. The centre will be in direct competition with Brent Cross, and being new as well as larger, is likely to have at least some initial impact on the performance of Brent Cross.
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Summary

- 4.23 The household telephone survey has identified Central London (West End), Harrow, Watford, Enfield Wood Green and Borehamwood as the main competing centres with Brent Cross, Edgware and North Finchley. It is clear that Central London is the most dominant centre in the sub-region. Watford is the largest retail centre after London (West End), with a good range of key anchor stores including John Lewis, Marks & Spencer, Bhs and Primark as well as an extensive choice of fashion multiples. There are relatively minor retail developments in the pipeline for Watford and it is unlikely that these will greatly augment the centre's current position in the sub-region or impact on the centres in Barnet.
- 4.24 Borehamwood, Harrow, Enfield and Wood Green are less influential over the survey area. Harrow and Wood Green are relatively comparable in their total retail floorspace which exceeds that of Brent Cross; however the overall trade drawn to each centre is less than 2%. There are some potential developments in the pipeline which would enhance the offer in these centres; however it is unlikely that this would significantly impact on centres in Barnet. There are no known developments in the pipeline for Borehamwood and once again, the trade drawn from the survey area to these centres is considered minimal.
- 4.25 A further retail destination which is likely to compete with Brent Cross in the future is the Westfield Centre at White City/Shepherds Bush. This is providing a significant amount of floorspace with five anchor stores and a vast range of unit shops and food and drink outlets. It is likely to attract shoppers from the western parts of the Brent Cross catchment.

5. REGIONAL SHOPPING CENTRE AND MAJOR CENTRE

5.1 Over the next two sections we examine the regional, major, district, local and neighbourhood centres in the adopted Barnet UDP, considering the current role and function of the centres and the extent to which they are meeting Borough's shopping needs and a summary of the key indicators is included as **Appendix 2a**. We also comment on the scope for centres to change their position in the hierarchy over the LDF period. In this section we cover the two centres at the top of the hierarchy set out in the adopted UDP; Brent Cross regional shopping centre and Edgware major centre.

Brent Cross Regional Shopping Centre

- 5.2 Brent Cross Shopping Centre is situated towards the south-west of the Borough (see Plan 13) and is well served by major road links including the M1 motorway and the A41 Hendon Way. The Brent Cross South Retail Park is situated to the south of the North Circular. It includes Borders, Next, TK Max, Sports World, DFS, Lakeland, Burton/Dorothy Perkins, The Carphone Warehouse, Game, Jessops and Mamas and Papas.
- 5.3 The Brent Cross Shopping Centre opened in 1976 and was the first enclosed shopping centre in the UK. Originally comprising circa 78,220 sqm gross across 75 units the centre underwent a major refurbishment in 1995 and a small extension in 1996. In 2008, the centre was extended further and presently comprises 83,528 sqm gross³ across 125 units. However, the centre has remained relatively dated and does not completely meet the standards to offer an all-round shopping and leisure 'experience' that is increasingly synonymous with modern-day developments.
- 5.4 The centre has two high quality anchor department stores; John Lewis and Fenwick which occupy sizable units at 13,350 sqm and 10,410 sqm gross respectively. There is a Waitrose foodstore (1,920 sqm gross) and a Marks & Spencer although the 4,630 sqm store is not ideally suited to the store format and the Simply Food section is somewhat cramped. Large units are also occupied by WHSmith (2,400 sqm) and Boots (1,540 sqm) but the majority of remaining units are considered relatively small with an average unit size of 480 sqm.
- 5.5 Table 5.1 outlines the composition of the centre by the number of units in August 2008, compared to the average of all UK centres audited by Goad. It is evident that the centre has significant representation by comparison retailers comprising 75% of all units compared to the national average of 35%. On closer analysis, a large proportion of these are occupied by high street multiple retailers and in particular those operating in the clothing and footwear categories such as

³ Brent Cross Cricklewood Planning Application: Revised Retail Report (November, 2008)

Gap, H&M and Topshop. There are also various designer fashion retailers including Cecil Gee, Karen Millen and Hugo Boss amongst others.

Table 5.1: Brent Cross Retail Composition by Number of Units

Retail Category	No. of Units	% of Total	UK Average (%)	Variance
Comparison	84	75.2%	35.22%	40.0
Convenience	7	5.6%	8.82%	-3.2
Service	22	17.6%	45.87%	-28.2
Vacant	2	1.6%	9.93%	-8.3
Total	125	100	100	-

Source: LB Barnet / Experian Goad (August, 2008)

- 5.6 In contrast, the centre has below average convenience provision with just seven units offering convenience goods. These comprise the 1,922 sqm net Waitrose supermarket in addition to a bakery, two health food stores and two confectioners as well as a Timpson shoe repairers. This does not however take into account the Marks & Spencer Simply Food section incorporated within the Marks & Spencer's store which represents additional provision. The table also indicates that there is below average service provision and closer analysis highlights that this is largely dominated by restaurants, cafes and fast food take aways. Other service provision includes one hair salon, two banks, two opticians, a dry cleaners and car wash facilities.
- 5.7 The centre has just two vacant units representing a vacancy rate of 1.6% which is well below the 9.93% national average. At the time of our site visit (August 2008) there was evidence of new retailers Lipsy and Abercrombie and Fitch fitting out units in the centre although we still identified two units that were vacant. The Focus property intelligence database indicates that in August 2008 there were 54 requirements for Brent Cross with a maximum floorspace of 358,285 sqm gross. This is a very strong level of retailer demand.

Table 5.2: Brent Cross Retailer Requirements by Use Category and Floorspace (sqm)

Use Category	No. of Requirements	Min. Floorspace (sqm gross)	Max. Floorspace (sqm gross)
Comparison	43	104,144	298,550
Convenience	0	0	0
Service	11	40,504	59,735
TOTAL	54	144,648	358,285

Source: Focus Property Intelligence (August 2008)

- 5.8 Table 5.2 highlights that the majority of requirements are from comparison retailers which include quality multiple retailers Whistles, Neals Yard remedies, Ghost and Hotel Chocolat as well as popular high street operators Esprit, Uniqlo, Superdrug and Lush. The service requirements include those from a similar range of popular high street operators such as Gourmet Burger

Kitchen, Leon, La Tasca as well as hotel operator Premier Inn and multiple café retailers Apostrophe and Costa Coffee. There are no requirements from any convenience operators.

- 5.9 In terms of rents and yields, in 2007, Prime Zone A rents in Brent Cross were £4,736 per sqm which is significantly higher than other centres in the sub-region, the only exception being central London. Previous patterns show that rents had remained static between 2002 and 2004 but experienced a rise in 2005 before peaking in 2007. Similarly, commercial yields at Brent Cross fluctuated between 5% and 4.5% between April 2003 and January 2006. In January 2007 yields fell to their lowest, 4.25% and have since remained at this level indicating high investor confidence in the centre.
- 5.10 Brent Cross benefits from good accessibility by a variety of transport modes as it is well served by the local strategic road network which includes the M1 and the A41 Hendon Way. There is a multi-storey car park providing 4,000 spaces in addition to surface car parks surrounding the centre providing a further 2,960 spaces for visitors. There is also a bus station served by 13 different bus routes covering north and central London and south Hertfordshire. The centre is also within walking distance Hendon Central and Brent Cross London Underground stations and 10 minutes walk from of Hendon Thameslink station.
- 5.11 Brent Cross is part of the 'Cricklewood, Brent Cross and West Hendon regeneration area' which the Council is promoting for re-development in a bid to create a new gateway for London and a vibrant area for Barnet.
- 5.12 A framework has been proposed and a planning application covering part of the regeneration area incorporating Brent Cross shopping centre to the north as well as the A41, Brent Cross Underground Station to the east, Cricklewood Lane to the south and the A5 to the west, was submitted to the Council in March 2008. The re-development of the 151 ha site, marketed as 'BXC', seeks to create a new town centre comprising residential environments along with a new high street. The application proposes a full range of town centre uses and Table 5.3 highlights the proposed distribution of the floorspace. Subject to receiving approval, development is predicted to start in 2011.

Table 5.3: BXC proposed distribution of floorspace (sqm)

Use	Use Class	Floorspace (sqm GEA)
Residential	C3	712,053
Retail	A1-A5	110,927
Business Use	B1-B8	456,611
Hotel	C1	61,264
Leisure	D2	26,078
Private Hospital	C2	18,580
Community Facilities	C1	34,615
Rail and Bus Stations	SUI GENERIS	2,533
Petrol Filling Station	SUI GENERIS	326
TOTAL	-	1,422,987

Source: <http://www.brentcrosscricklewood.com> (August 2008)

- 5.13 In summary, Brent Cross possesses a retail offer which suitably reflects its status as a regional shopping destination. The retail offer is largely dominated by multiple retailers and those operating in the comparison goods category with the presence of convenience and service operators performing more of a complementary role. There are few vacant units, and evidence of new retailers moving in as well as high retailer demand. Rents are high and yields are low similarly indicating good investor confidence. The centre benefits from a superior retail offer, a pleasant shopping environment and good accessibility from a range of transport modes and is considered to be performing in line with its status and position in the retail hierarchy. Furthermore, plans to redevelop the surrounding area to integrate a residential community along with a range of additional retail business and community uses will further enhance Brent Cross's current performance and ensure the long-term vitality and viability of the centre.

Edgware Major Town Centre

- 5.14 Edgware is situated to the north west of the Borough on the border with London Borough of Harrow (see Plan 13). The main parts of the centre are distributed along Station Road (A5100) and the High Street (A5). High Street effectively represents the Borough boundary with units to the east situated in Barnet and those to the west considered within the jurisdiction of Harrow. Table 5.4 below highlights the distribution of retail provision within each Borough.

Table 5.4: The distribution of retail provision in Edgware by Unit and Floorspace

Retail Category	LB Barnet	LB Harrow	TOTAL*
Number of units	239	115	354
Floorspace (sqm gross)	43,690	15,348	59,038

Source: LB Barnet / Experian Goad (2008) (*include units within LB Harrow)

- 5.15 For the purposes of this study we have largely focused our analysis to only those units within the Barnet Borough boundary although we do acknowledge that parts of the centre extend beyond this. We have prepared a summary proforma for Edgware which is attached as **Appendix 2b**. Table 5.5 outlines the composition of units within Barnet's boundary by the number of units compared to the average of all UK centres audited by Goad.

Table 5.5: Edgware Retail Composition by Number of Units

Retail Category	No. of Units	% of Total	UK Average (%)	Variance
Comparison	83	34.73%	35.22%	-0.49
Convenience	25	10.46%	8.82%	1.64
Service	115	48.12%	45.87%	2.25
Vacant	16	6.69%	9.93%	-3.24
Total	239	100	100	-

Source: LB Barnet / Experian Goad (2008)

- 5.16 The table above demonstrates that the retail composition of Edgware is broadly consistent with the national average although there is marginally above average representation of convenience and service goods and below the average number of vacant units.
- 5.17 Closer analysis indicates that the comparison goods offer is largely dominated by retailers in the clothing and accessories category. There is also high representation of chemists and drugstores, electrical goods and stores selling home furnishings, hardware and household goods. There is some presence from high street multiple retailers such as Marks & Spencer, Topshop, Woolworths, Argos, Boots and WHSmith which contribute to a reasonably standard retail offer in the centre.
- 5.18 There is a good range of convenience provision which include bakeries, butchers, fishmongers, grocers and delicatessens as well as newsagents, health food stores, an off licence and general convenience stores. The main foodstore is a 4,780 sqm gross Sainsbury's supermarket situated in the Broadwalk Shopping Centre and there is also a Tesco Express located towards the other end of the centre along Hale Lane. There is a good quality ethnic food offer which includes kosher bakery Grodzinski and Mendy's Kosher superstore.
- 5.19 There is a good range of service provision including high street banks, estate agents and other business services, in addition to hair and beauty salons, opticians, dry cleaners and betting offices amongst others. There are also various restaurants, fast food takeaways and cafes with some presence of high street multiple operators including Pizza Hut, Burger King, Neros, Costa Coffee, and most recently, Starbucks.
- 5.20 The Broadwalk Shopping Centre is located on Station Road directly adjacent to the London Underground and bus stations. There are some pedestrian links between the centre and the stations although these could be improved. The single-storey centre comprises approximately 15,320 sqm gross floorspace across 37 units as well as several retailers occupying temporary kiosks within the internal walkways. The centre originally opened in 1990 although subsequent refurbishment has meant that the present internal environment is very much in keeping with modern expectations.
- 5.21 The centre is anchored by the Sainsbury's foodstore as well as Marks & Spencer. Other key retailers include Boots, HMV, the Body Shop, New Look and a Top Shop clearance store. There is also a Costa Coffee situated in a central courtyard which is a pleasant focal point and adds to an overall good quality shopping environment. In contrast to the modern interior, the exterior of the building and in particular the front façade is less impressive. There are untidy brick planters situated directly outside the front of the centre and somewhat mask the entrance. Improvements could enhance this area and create a more welcoming entrance.
- 5.22 In total, Edgware has 16 vacant units representing a vacancy rate of 6.69% which is below the 9.93% national average. At the time of our site visit there was evidence of new retailers (including Starbucks) opening new stores and provides a positive indicator of investor confidence in the centre. Vacant units are distributed across the centre with no noticeable concentrations. The size of vacant units varies from 40 sqm to 350sqm with an average size of 135 sqm.
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5.23 The Focus property intelligence database indicates that in August 2008 there were 14 requirements in Edgware for a maximum floorspace of 29,858 sqm gross. Table 5.6 below highlights that the majority of requirements are from comparison retailers and includes demand from variety store operators TJ Hughes and TK Maxx. Other requirements are mainly from discount multiple retailers including Priceless and 99p Store and there is also demand from well-known charity store operators. There is one convenience requirement from Timpson shoe repairers and three service requirements which are seeking A4 units for new bar or public house premises.

Table 5.6: Edgware Retailer Requirements by Use Category and Floorspace (sqm)

Use Category	No. of Requirements	Min. Floorspace (sqm gross)	Max. Floorspace (sqm gross)
Comparison	10	6,805	26,421
Convenience	1	9	46
Service	3	2,674	3,391
TOTAL	14	9,488	29,858

Source: Focus Property Intelligence (August 2008)

5.24 From the above requirements we have identified demand for an average unit size between 678 sqm and 2,133 sqm. Vacant units in Edgware are, on average, 135sqm which suggests that supply is not adequately meeting current retailer demand for larger units.

5.25 Prime Zone A rents in Edgware have remained static at £1,023 per sqm since 2003 although commercial yields have gradually fallen from 10% in 2005 to 9% in 2006, to 8.5% in 2007 and in 2008 have now reached a lowest level at 7.5%. Falling yields are a positive indicator demonstrating investor confidence in the centre.

5.26 Edgware is well served by a variety of transport modes. Edgware London Underground station is centrally positioned on the main high street, adjacent to the Broadwalk Shopping Centre, providing direct access to the Northern Line services into Central and south London. The centre also benefits from a bus station situated to the rear of the Underground station which is served by 70 different bus routes including two that operate on a 24-hour basis. There is good parking provision in Edgware with approximately 1,072 parking spaces in off-street car parks, including a 260-space car park to the rear of the shopping centre.

5.27 In terms of the overall shopping environment, the centre has adequate provision of street furniture including visitor seating, bins and signage. Along Station Road and Hale Lane, lampposts, railings and bollards are co-ordinately painted dark blue which creates a sense of consistency in this part of the centre. Further west along Station Road, towards the junction with the A5 and the Harrow boundary, the environment is less attractive with poorly maintained shop fronts and some unsightly vacant units. There is a large vacant former public house at this end of Station Road, however we are aware that planning approval has been recently granted for the redevelopment of this site and the reinstatement of the hotel use. A sizable site to the rear of the public house, known as Forumside, is identified in the UDP as a potential site for mixed use development comprising retail, business, housing and leisure development.

- 5.28 A planning strategy for the town centre is being prepared to provide a framework for future development in Edgware to facilitate appropriate expansion, improvement and consolidation of retail and residential provision. Opportunity sites within the town centre are identified and a summary site analysis for each sets out the opportunities and sensitivities to be considered. These include the potential for expansion and consolidation of retail provision at the Broadwalk Shopping Centre as part of a wider mixed use town centre development incorporating residential and leisure facilities.
- 5.29 In summary, Edgware is a sizable centre offering a diverse range of shops and services with representation from typical high street multiple retailers in addition to a range of local independent operators. There is also good provision of specialist ethnic or kosher goods, particularly in the convenience sector. The centre is easily accessible from a range of transport modes and there are good pedestrian links both throughout the centre and to surrounding residential areas. The quality of the environment varies with some areas, such as the Broadwalk Centre and parts of Station Road, in a significantly better overall condition than others.
- 5.30 The centre has a below average vacancy rate and a number of established requirements which in addition to evidence that new multiple retailers such as Starbucks are moving are all indicative of investor confidence. There is also an emerging strategy identifying key opportunities and the means to manage the delivery of new developments to transform the town centre towards securing future vitality and viability.
- 5.31 Edgware is therefore considered to be performing well in its role as the Borough's major town centre. There are various identified development opportunities which will further enhance the centre upon delivery. In the short-term, however, the centre would benefit from some environmental improvements to enhance the overall appearance and achieve a more pleasant shopping environment throughout.

Summary

- 5.32 Our detailed qualitative analysis of Brent Cross and Edgware highlights that the Borough's two largest centres are generally performing well and in line with their respective positions in the retail hierarchy. It is acknowledged that Brent Cross has a relatively limited convenience and service provision, however this is considered appropriate to its function as a regional shopping centre where the appeal rests largely in the comparison goods market. This will be addressed with the re-development of the Brent Cross Cricklewood area and the provision of a new town centre. In contrast, Edgware comprises the wider variety of retail provision, more in line with national averages, and adequately meets its role as a Major Centre.

6. DISTRICT, LOCAL & NEIGHBOURHOOD CENTRES

6.1 Plan 13 shows the LB Barnet retail hierarchy and the distribution of the district, local and neighbourhood centres. The 14 district town centres are broadly distributed around major transport links such as the Great North Road in the east and Edgware Road in the west. It should be noted that the district centres of Burnt Oak, Colindale - The Hyde and Cricklewood are divided between Barnet and neighbouring London Boroughs and our assessment only applies to those parts of the centres that are within Barnet. The five local centres are similarly distributed in close proximity to the Borough's larger centres towards the east, south and western areas of the Borough. It would appear there are gaps in provision in the north west and central parts of the Borough.

6.2 The published information for most of these centres is limited and our healthcheck assessment therefore draws largely on data provided by LB Barnet and site visits carried out by GVA Grimley in September 2008. Each centre is defined using data provided by the Borough council. This is largely drawn from Experian Goad and itemises each unit in each centre, identifying fascia, address, activity, Experian category, retail category, floorspace, use class and frontage.

6.3 For each of the district and local town centres we have prepared a standardised proforma which considers the following:-

- Retail composition including number, size and type of units/uses;
- Centre boundary/frontages/development opportunities;
- Physical, functional and environmental characteristics;
- Anchor/Key Stores;
- Vacancies;
- Accessibility and Car Parking; and
- Overall role of centre and its position in the retail hierarchy

6.4 The proformas for each centre are set out in **Appendix 2c-2e** and should be read in conjunction with the following chapter which provides an overview of the provision of each of the centres and considers their future roles.

District Centres

6.5 To put the centres in context, we have compared the composition of each centre in terms of the total number of units (Table 6.1) in the convenience, comparison, service and vacant categories and total floorspace (Table 6.2) in the same categories.

Table 6.1: Composition of District Town Centres by Number of Units

Centre	Convenience		Comparison		Service		Vacant		Total
Cricklewood*	45	16.6%	67	24.7%	143	52.8%	16	5.9%	271
Burnt Oak*	45	18.7%	69	28.6%	113	46.9%	14	5.8%	241
North Finchley	19	8.0%	73	30.7%	129	54.2%	17	7.1%	238
Finchley Church End	33	14.0%	55	23.4%	129	54.9%	18	7.7%	235
Chipping Barnet	22	9.9%	87	39.1%	103	46.2%	11	4.9%	223
Golders Green	20	10.8%	49	26.5%	101	54.6%	15	8.1%	185
Brent Street	25	14.9%	37	22.0%	91	54.2%	15	8.9%	168
Temple Fortune	24	16.6%	52	35.9%	66	45.5%	3	2.0%	145
Hendon Central	18	13.0%	29	21.0%	83	60.1%	8	5.8%	138
East Finchley	18	15.9%	27	23.1%	63	53.9%	9	7.7%	117
Colindale - The Hyde*	17	15.3%	18	16.2%	72	64.9%	4	3.6%	111
Mill Hill	12	11.1%	33	30.6%	60	55.6%	3	2.8%	108
Whetstone	8	8.8%	27	29.7%	53	58.2%	3	3.3%	91
New Barnet	6	7.5%	19	23.8%	41	51.3%	14	17.5%	80
Borough Average	-	13.3%	-	27.3%	-	53.0%	-	6.4%	-
UK Average⁴	-	8.8%	-	35.2%	-	45.9%	-	9.9%	-

Source: LB Barnet / Experian Goad (2008) *Figure includes units situated outside the LB Barnet boundary

- 6.6 Table 6.1 shows that the centres of North Finchley and Finchley Church End are broadly similar in size to the LB Barnet part of Edgware with 238 and 235 units respectively. The breakdown composition of the centres is also broadly similar with the majority of units in the service category and fewest in the convenience category. This is a composition pattern which is largely reflected across the remaining district centres which range in size from Chipping Barnet with 223 total units to New Barnet with 80.
- 6.7 We have calculated the average composition for all centres in the Borough, which in comparison with the UK average indicates that there is generally above average representation in the convenience and service sectors but less than average provision in the comparison category. There is also less than the national average number of vacant units which is a very positive indicator suggesting an overall healthy performance across the Borough.
- 6.8 In the convenience sector, Burnt Oak has the highest number of units representing 18.7% which is well above the 13.3% average in the Borough. Temple Fortune, Cricklewood, East Finchley and Colindale - The Hyde also have above average number of convenience units whereas in Whetstone, North Finchley and New Barnet the number of convenience units is less than average. In the comparison sector, Chipping Barnet and Temple Fortune have above the UK and

⁴ Based on an average of all centres audited by Goad.

Borough average number of units with 39.1% and 35.9% respectively. North Finchley, Mill Hill, Whetstone and Burnt Oak have above the Borough average number of comparison units. Hendon Central, Brent Street and Colindale - The Hyde have the lowest levels of comparison units compared to the other centres in the Borough. In respect of services units, Colindale - The Hyde, Hendon Central and Whetstone have considerably above UK and Borough average provision. In Burnt Oak, Chipping Barnet and Temple Fortune there is below the Borough average number of service units.

- 6.9 Table 6.1 also highlights that New Barnet has well above the average number of vacant units. This can however be partly attributed to the concentration of vacant units comprising Tesco's proposed development site.
- 6.10 Table 6.2 on the following page highlights the composition of the centres in terms of floorspace (sqm gross). New Barnet has the greatest proportion of convenience goods floorspace, 40.4% compared to an average of 16.9% for the Borough. Convenience floorspace also makes up a high proportion of space in Temple Fortune and Finchley Church End. In contrast, Mill Hill, Colindale - The Hyde and Cricklewood have less than the average convenience floorspace with between 12-13% floorspace dedicated to convenience goods.
- 6.11 The average comparison goods floorspace provision in Barnet is almost 10% below the UK average. The highest amount of comparison floorspace is in Chipping Barnet (39.2%), Cricklewood (35.6%), Temple Fortune (33.4%) and Burnt Oak (32.3%). New Barnet and Hendon Central have significantly below average comparison goods floorspace provision with 18.5% and 16.4% respectively. In contrast, the average service provision in the Borough is above the national average, with the highest levels of service floorspace in Hendon Central (60.6%), Colindale - The Hyde (56.3%), Mill Hill (53.2%) and Whetstone (52.6%). New Barnet has the lowest level of service provision in terms of floorspace amounting to just 34%.
- 6.12 The average percentage of vacant floorspace for the Borough is 6% which is less than the 8.1% national average. North Finchley and Golders Green have the highest amount of vacant floorspace (10% and 9.9% respectively). Colindale - The Hyde and Temple Fortune have the 2% or less.

Table 6.2: Composition of District Town Centres by Floorspace

Centre	Convenience		Comparison		Service		Vacant		Total
	sqm	%	sqm	%	sqm	%	sqm	%	sqm
Cricklewood*	8,491	12.0%	25,176	35.6%	32,060	45.3%	4,979	7.0%	70,706
North Finchley	6,340	16.7%	10,490	27.7%	17,300	45.7%	3,700	10.0%	37,900
Chipping Barnet	5,030	13.4%	14,770	39.2%	16,630	44.2%	1,240	3.3%	37,670
Burnt Oak*	7,395	21.9%	10,906	32.3%	13,944	41.3%	1,533	4.5%	33,778
Finchley Church End	7,350	23.5%	7,010	22.4%	15,360	49.1%	1,540	4.9%	31,260
Whetstone	2,720	19.5%	7,350	25.6%	15,360	52.6%	1,540	2.4%	31,260
Golders Green	4,420	16.7%	6,570	24.8%	12,840	48.5%	2,630	9.9%	26,460
Temple Fortune	5,030	23.6%	7,140	33.4%	8,740	40.9%	440	2.0%	21,350
East Finchley	3,430	18.3%	4,710	25.2%	9,120	48.8%	1,440	7.7%	18,700
Brent Street	3,070	17.3%	4,480	25.3%	8,590	48.5%	1,560	8.8%	17,700
Mill Hill	2,130	12.7%	5,290	31.7%	8,880	53.2%	390	2.3%	16,690
Hendon Central	2,720	16.4%	2,710	16.4%	10,030	60.6%	1,080	6.5%	16,540
Colindale - The Hyde*	1,895	12.7%	4,318	29.0%	8,380	56.3%	288	1.9%	14,880
New Barnet	5,200	40.4%	2,380	18.5%	4,370	34.0%	920	7.2%	12,870
Borough Average	-	16.9%	-	29.2%	-	46.8%	-	6.0%	-
UK Average⁵	-	14.3%	-	38.6%	-	38.8%	-	8.1%	-

Source: LB Barnet / Experian Goad (2008) *Figure includes floorspace situated outside LB Barnet boundary

- 6.13 It is evident that Cricklewood has the greatest total floorspace, however only 14,920 sqm of the overall total is situated within Barnet's boundary. The total floorspace in Burnt Oak and Colindale - The Hyde is also divided between Barnet and neighbouring London Boroughs as highlighted in Table 6.3 on the following page. Whilst the proportion of units and floorspace within Barnet is only marginally representative of the overall provision for each centre as a whole, this study focuses on the retail provision situated within Barnet's administrative boundary.

⁵ Based on an average of all centres audited by Goad.

Table 6.3: Composition of District Centres extending beyond LB Barnet boundary

Centre	BURNT OAK		COLINDALE - THE HYDE		CRICKLEWOOD	
	LB Barnet	TOTAL	LB Barnet	TOTAL	LB Barnet	TOTAL
Convenience	28	45	7	17	12	45
Comparison	45	69	12	18	11	67
Service	44	113	23	72	40	143
Vacant	6	14	2	4	0	16
Total Units	123	241	44	111	63	271
Total Floorspace (sqm) gross	15,620	33,778	4,550	14,880	14,920	70,706

Source: LB Barnet / Experian Goad Category Reports, 2008

- 6.14 All the district centres have at least one convenience store. As demonstrated by Table 6.4 below, the larger centres generally have more convenience stores, are most likely to contain large foodstores and offer a more varied product range. It is also clear that the majority of centres include representation from at least one of the national multiple supermarkets such as Sainsbury's, Tesco or Waitrose which are often supplemented by smaller national operators such as Somerfield, Co-op, Iceland and Budgens amongst others.

Table 6.4: Barnet District Centre Foodstores⁶

Centre	Anchor Food Store	Size (sqm net)	Other multiple foodstores
Finchley Church End	Tesco	3,102	Best One; Supersave Food & Wine
New Barnet	Sainsbury's	2,955	-
North Finchley	Sainsbury's	2,285	-
Temple Fortune	Waitrose	1,880	M&S Simply Food
Mill Hill	M&S Simply Food	1,685	Costcutter
Chipping Barnet	Waitrose	1,505	Iceland
Whetstone	Waitrose	1,496	-
Golders Green	Sainsbury's	1,260	Tesco
Burnt Oak	Tesco	1,092	AM 2 PM
East Finchley	Budgens	468	Iceland; Spar
Hendon Central	Costcutter	200	Nisa; Premier Express
Cricklewood	Somerfield	753	Iceland
Brent Street	Tesco	677	-
Colindale - The Hyde	Costcutter	-	Londis*

Source: LB Barnet / Experian Goad, 2008 / GVA Grimley, August 2008

*located within LB Brent

⁶ In some centres there are also edge of centre foodstores which are not listed here but discussed further in Section 7.

- 6.15 The location of the main foodstores by fascia is illustrated on Plan 15. Waitrose, in particular, has noticeable presence in the district centres in the Borough with stores in Chipping Barnet, Whetstone and Temple Fortune. There is also a store in Brent Cross Shopping Centre and out/edge of centre Waitrose stores at North Finchley and Mill Hill. Sainsbury's has stores in three district centre stores including New Barnet, Golders Green and North Finchley and Tesco stores in three district centres, including Brent Street, Finchley Church End, Burnt Oak and a Tesco Express on Golders Green Road.
- 6.16 The majority of the district centres have a good range of other convenience uses such as independently operated butchers, bakeries, greengrocers and delicatessens. Many also include some element of specialist convenience provision, particularly those catering in kosher goods or to the needs of particular local ethnic populations. Cricklewood, Burnt Oak and Temple Fortune cater particularly well in this respect.
- 6.17 There are also the following permanent street markets operating in Chipping Barnet, North Finchley and Burnt Oak.
- *Barnet Market, St. Albans Road, Chipping Barnet (Wednesdays and Saturdays from 7am)*
 - *Finchley General Market, Lodge Lane, North Finchley (Tuesdays, Fridays and Saturdays from 9am to 4pm)*
 - *Watling Market, Watling Avenue, Burnt Oak (Saturdays from 7am)*
- 6.18 Barnet Market is currently operating from Stapylton Road car park in Chipping Barnet district centre, as the St. Albans road site is being redeveloped for residential use. Once complete, the new development will also provide new market facilities, however, due to the prevailing market conditions the development has stalled. The market's owners are also reluctant to extend their lease at Stapylton Road car park and consequently the future of the market is currently in doubt.
- 6.19 The Watling Market site comprises ten kiosks, 52 stalls, four van pitches and 14 lock-ups, although currently the market operates well under full capacity and its future is also under threat with the council hoping to sell it to a private investor. The North Finchley Market comprises over 100 stalls selling various goods.
- 6.20 We have also looked at the range of comparison retailers and services on offer in each of the centres. Our qualitative assessment has identified that outside of Brent Cross and Edgware, Chipping Barnet is the only centre in the Borough which has an enclosed shopping centre. The Spires shopping centre opened in 1989 and was refurbished in 1993. The centre comprises 36 retail units and totals approximately 6,310 sqm gross floorspace. The centre is attractive with open courtyards and an overall traditional design which suitably reflects the market town characteristics of Chipping Barnet. The centre is anchored by a Waitrose foodstore and the majority of units are occupied by national multiple retailers including WH Smith, Dorothy Perkins and Monsoon.
- 6.21 Table 6.5 below indicates that Chipping Barnet has the highest percentage of multiple retailers with 49%. Over a third of units in Golders Green, Mill Hill and North Finchley are occupied by
-

multiple retailers but the remaining centres are less well represented in this respect. Colindale - The Hyde which has just 11% of multiple retailers.

Table 6.5: Barnet District Centres Multiple Retailer Offer

Centre	Multiple retailers	Multiple retailers (%)*	A1 Uses (%)*
Chipping Barnet	Boots; Monsoon; Dorothy Perkins	49%	65%
Golders Green	Boots; Rymans; The Carphone Warehouse	38%	54%
North Finchley	Woolworths; WHSmith; Argos; Waterstones; River Island; Game	37%	56%
Mill Hill	Boots; WHSmith; Woolworths	36%	63%
Finchley Church End	Superdrug; QS; Dreams	30%	54%
New Barnet		32%	41%
Brent Street		20%	51%
Temple Fortune	Boots; WHSmith	20%	68%
Hendon Central	-	20%	52%
Burnt Oak	Superdrug; Maplin Electronics; The Card Shop	20%	76%
East Finchley	The Post Shop; Phone City	27%	58%
Whetstone	Boots; Alliance Pharmacy	26%	51%
Cricklewood	B&Q; Phone City	19%	63%
Colindale - The Hyde		11%	57%

Source: LB Barnet / Experian Goad Category Reports, 2008 / GVA Grimley, August 2008

*figure includes convenience operators

- 6.22 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.
- 6.23 Retail banks (e.g. HSBC, Natwest, Barclays) and building societies (e.g. Nationwide, Britannia, Yorkshire) also add to vitality and viability although there are varying levels of representation from these service providers across Barnet's district centres. Golders Green has the highest representation of retail banks and building societies (11 outlets). Chipping Barnet, North Finchley and Church End Finchley also have good provision (8-9 outlets). Provision in Temple Fortune, Whetstone, Brent Street, Hendon Central, East Finchley and Mill Hill ranges between 2-5 banks/building societies. There is a single Lloyds TSB in Burnt Oak. There are no retail banks or building societies in Colindale – The Hyde, Cricklewood or New Barnet.
- 6.24 As highlighted above, the proportion of A1 units in the centres varies between 41% and 76% with the majority comprising greater than 50%. Burnt Oak has the greatest proportion of A1 units and New Barnet has the least. It is not therefore surprising that New Barnet has a high proportion of A3-A5 units (25%) as demonstrated by Table 6.6 below.
- 6.25 Cricklewood and Whetstone also have a relatively high proportion of A3-A5 units comprising 23% and 25% respectively. The quality of this provision varies with A3-A5 units in New Barnet and

Cricklewood comprises a significant number of fast food take-aways and public houses whereas in Whetstone there are a higher proportion of restaurants and bars which are reflective of a more affluent surrounding population in this part of the Borough. We consider the quality of the food and drink offer in centres in more detail in Section 8.

Table 6.6: A3-A5 Uses

Centre	Multiple operators	A3-A5 uses (%)
Cricklewood	KFC; McDonalds; McGowans Irish Bars	30%
New Barnet	JD Wetherspoon; Pizza Go Go; Pizza Hut	25%
Whetstone	Ask; Costa Coffee; Pizza Express; Scottish & Newcastle Pub Enterprises; Subway	23%
Golders Green	Costa Coffee; KFC; Neros; Pizza Express; Starbucks; Subway	21%
Brent Street	Pizza Go Go; Trust Inns	21%
North Finchley	Coffee Republic; McDonalds; Neros; Pizza Express; Starbucks;	20%
East Finchley	Costa Coffee; Dominos Pizza; KFC; Pizza Hut	18%
Finchley Church End	Café Azzurro; KFC; Pizza Hut; Subway	17%
Mill Hill	Pizza Express; Pizza Hut	17%
Colindale - The Hyde	JD Wetherspoon	16%
Temple Fortune	Starbucks, Costa Coffee	14%
Chipping Barnet	Chicken Cottage; Costa Coffee; KFC; McDonalds; Starbucks	13%
Hendon Central	Dominos; KFC; Pronto Pizza; Subway	13%
Burnt Oak	Dixy Chicken; Perfect Fried Chicken; Punch Taverns	12%

Source: LB Barnet / Experian Goad Category Reports, 2008 / GVA Grimley, 2008

- 6.26 We have identified requirements for some of the district centres and these are summarised in Table 6.7 on the following page. It is evident from the table that there is the highest level of demand in Golders Green with ten requirements from comparison retailers which includes high street multiple retailers Superdrug, Poundland and charity shop operators British Heart Foundation, Save the Children and YMCA. The requirements for service premises include McDonalds, the Barracuda bar chain and Explore Learning Ltd, a learning centre for 5-14 year olds. We have not identified any requirements for Chipping Barnet, Finchley Church End, Brent Street or New Barnet.

Table 6.7: District Centre Retail Requirements

Centre	Total Requirements	Comparison	Convenience	Service
Golders Green	13	10	0	3
Mill Hill	10	4	0	6
Cricklewood	8	5	1	2
North Finchley	7	4	0	3
Whetstone	6	3	0	3
East Finchley	3	2	0	1
Temple Fortune	3	2	0	1
Burnt Oak	2	2	0	0
Colindale - The Hyde	2	1	0	1
Hendon Central	2	1	0	1
Chipping Barnet	0	0	0	0
Finchley Church End	0	0	0	0
Brent Street	0	0	0	0
New Barnet	0	0	0	0

Source: Focus Property Intelligence (August 2008)

6.27 Our assessment has established that all of the centres are reasonably well served by public transport with good pedestrian linkages to surrounding residential areas and key transport interchanges as demonstrated by Table 6.8 below.

6.28 **Table 6.8: Accessibility**

Centre	London Underground Station	Mainline Station	Strategic Bus Routes	Cycle parking	Car Park	On-Street Parking
Golders Green	Golders Green	-	✓	✓	Sainsbury's	✓
Mill Hill	-	Mill Hill Broadway	✓	✓	✓	✓
Cricklewood	-	Cricklewood	✓	✓	✓	✓
North Finchley	-	-	✓	✓	✓	✓
Whetstone	Totteridge & Whetstone	-	✓	✓	✓	✓
East Finchley	East Finchley	-	✓	✓	-	✓
Temple Fortune	Golders Green	-	✓	✓	M&S	✓
Burnt Oak	Burnt Oak	-	✓	✓	✓	✓
Colindale - The Hyde	Colindale	-	✓	✓	✓	✓
Hendon Central	Hendon Central	-	✓	✓	-	✓
Chipping Barnet	High Barnet	-	✓	✓	✓	✓
Finchley Church End	Finchley Central	-	✓	✓	Tesco	✓
Brent Street	Hendon Central	West Hendon	✓	✓	✓	✓
New Barnet	-	New Barnet	✓	✓	✓	✓

Source: LB Barnet / GVA Grimley, 2008

- 6.29 A more detailed account of the accessibility in each centre is set out in the proformas in **Appendix 2c**. Many of the centres also have on-street parking, which is particularly important where specialist uses attract people from outside of the local walk-in catchment area, and where centres are located on strategic routes that cater for the needs of those passing through, as well as the local population.
- 6.30 The environmental quality of the centres varies with some considerably more attractive and well-maintained than others. Many of the centres are situated along busy main roads which undermines the quality of the environment somewhat. Several of the centres also look tired in parts and would benefit from environmental improvements. In most cases enhanced hard and soft landscaping and planting would assist in counteracting the impacts of heavy traffic flows as well as freshen the appearance of centres.
- 6.31 The centres are generally clean and shop fascias are well maintained. This is assisted by the Town Centre Keepers (TCKs) who regularly clean the centres and proactively monitor and respond to incidents of graffiti, vandalism, fly-posting, fly-tipping and litter amongst other offences. In doing this, the TCK's operate a 'zero-tolerance' principle which has effectively seen the overall environmental quality of Barnet's centres improve in the ten years since they were originally established. The work of the TCKs is supported by good communication links with various other Council departments including those dealing with licensing, trade waste and CCTV operation. There is currently CCTV provision in all the district centres apart from Colindale - The Hyde where it is currently being installed. A more detailed review of the environmental quality at the time of our site visits in August 2008, is provided in the individual centre proformas in **Appendix 2c**.

Local Centres

- 6.32 As demonstrated by Table 6.5 below, the five local centres are less variable in size and contain between 57 and 81 units. West Hendon comprises 77 units and East Barnet comprises 81. Similar to the district centres, the local centres are dominated by service units (40-60%) and comprise broadly between 22% and 29% comparison units and 6% and 15% convenience units. Tables 6.10 and 6.11 demonstrate the breakdown of the retail composition in each of the local centres by number of units and floorspace (sqm).

Table 6.10: Composition of Local Centres by Number of Units

Centre	Convenience		Comparison		Service		Vacant		Total
East Barnet	12	14.8%	22	27.1%	44	54.3%	3	3.7%	81
West Hendon	12	15.6%	22	28.6%	31	40.3%	12	15.6%	77
Childs Hill	4	6.5%	14	22.6%	39	62.9%	5	8.0%	62
Friern Barnet	5	8.8%	15	26.3%	35	61.4%	2	3.5%	57
Market Place	9	15.8%	17	29.8%	26	45.6%	5	8.8%	57

Source: LB Barnet / Experian Goad Category Reports, 2008

Table 6.11: Composition of Local Centres by Floorspace (sqm)

Centre	Convenience		Comparison		Service		Vacant		Total
	Units	%	Units	%	Units	%	Units	%	
West Hendon	1,220	15.5%	2,510	32.0%	2,620	33.4%	1,500	19.1%	7,850
East Barnet	1,960	27.8%	1,550	22.0%	3,280	46.5%	260	3.7%	7,050
Childs Hill	640	11.3%	1,250	22.0%	3,370	59.3%	420	7.4%	5,680
Market Place	800	15.2%	1,550	29.5%	2,020	38.4%	890	16.9%	5,260
Friern Barnet	770	15.5%	1,100	22.1%	2,830	56.8%	280	5.6%	4,980

Source: LB Barnet / Experian Goad Category Reports, 2008

- 6.33 With the exception of West Hendon, the level of vacant units and floorspace is relatively low. West Hendon has a significantly high number of vacant units (15.6%) and not surprisingly, the highest vacant floorspace (19.1%). West Hendon is also the local centre which appears most dilapidated, deprived and very much in need of enhancement. This has been recognised by the Council and the centre has been identified within the Cricklewood, Brent Cross, and West Hendon regeneration area. Furthermore, outline planning permission was granted mid-2008 for the redevelopment of the West Hendon Estate to provide 2,171 residential units and circa 10,000 sqm for retail, office, food and drink, community and leisure uses.
- 6.34 Proforma summaries for each of the centres are attached as **Appendix 2d** and Table 6.12 below highlights some key indicators for each centre, both demonstrating that the centres are broadly similar in their offer. East Barnet, West Hendon and Friern Barnet have benefited from having an albeit small anchor foodstore which is absent in Childs Hill and Market Place. The latter does however have the highest representation of multiple retailers (23%) which are largely high street multiple bank or building society operators. Childs Hill has a very limited overall convenience provision and there is a well-positioned vacant site which could be a potential development site for a modest foodstore as part of a mixed-use development.

Table 6.12: Barnet Local Centres Key Centre Uses

Centre	Convenience Store / CTN	Bank/Building Society	Post Office	Personal Services	Food/Drink Outlets
East Barnet	✓	✓	✓	✓	✓
West Hendon	✓	✓	✓	✓	✓
Childs Hill	✓	-	✓	✓	✓
Friern Barnet	✓	-	✓	✓	✓
Market Place	✓	-	✓	✓	✓

Source: LB Barnet / Experian Goad Category Reports, 2008 / GVA Grimley, 2008

- 6.35 The local centres are each located along or around relatively busy road networks in the Borough and in close proximity to other larger centres. East Barnet is an attractive village with a good range of local independent operators and pleasant landscaping. Market Place is situated on the A1, within the Hampstead Garden Suburbs, and benefits from an overall good quality environment with modern fascias, well-maintained pavements and planting. The quality of the environment in Childs Hill varies with some units in need of improvement and there is an inconsistent retail frontage which limits integration and a central focus. Some areas of Friern Barnet could also benefit from further enhancement. Situated along Woodhouse Road and

around the junction Colney Hatch Lane, the centre is dominated by heavy traffic which detracts from the overall environment and impedes pedestrian movement. Finally, West Hendon exhibits poorly-maintained buildings and shop fronts in addition to an overall low quality shopping environment. As we have highlighted, this centre is the subject of a regeneration scheme which will help revitalise the centre.

Neighbourhood Centres

6.36 We have also assessed the ten neighbourhood centres in Barnet and a summary of our findings is included in **Appendix 2e**. Table 6.13 below highlights the retail composition of the neighbourhood centres and demonstrates a broad variation in size from Grahame Park which has just 19 units (3,382 sqm) to Golders Green Road which is the largest comprising 49 units (5,625 sqm).

Table 6.13: Composition of Neighbourhood Centres by Number of Units

Centre	Convenience		Comparison		Service		Vacant		Total
New Southgate*	12	16.1%	14	13.8%	52	59.8%	9	10.3%	87
Golders Green Road	12	24.5%	12	24.5%	22	44.9%	3	6.1%	49
Colney Hatch Lane*	8	19.1%	8	19.1%	23	54.8%	2	7.1%	42
Hale Lane	6	14.6%	7	17.1%	26	72.2%	2	2.9%	41
Hampden Square	3	7.5%	13	32.5%	22	55.5%	2	5.0%	40
Holders Hill Circus	8	22.9%	6	17.1%	21	60.0%	0	0.0%	35
Great North Road	1	3.1%	8	25.0%	19	59.4%	4	12.5%	32
Apex Corner	1	4.0%	9	36.0%	14	56.0%	1	4.0%	25
Deansbrook Court	6	24.0%	4	16.0%	13	52.0%	2	8.0%	25
Grahame Park	5	26.3%	1	5.3%	11	57.9%	2	10.5%	19

Source: LB Barnet 2008

*Figures include units situated outside the LB Barnet boundary

6.37 The table also demonstrates that each centre is largely dominated by service operators. Golders Green Road is the only centre which has less than 50% of units dedicated to this category, whilst Hale Lane has the highest percentage of service provision with 16 units equating to 72.2% which largely dominated by food and drink outlets (including five fast-food takeaways, a café, two restaurants and two public houses) and health and beauty services.

6.38 The majority of centres have good representation of convenience goods although in Hampden Square, Great North Road and Apex Corner the convenience provision is more limited and falls below the 8.89% national average. In contrast, Apex Corner has marginally above average representation of comparison retailers, whereas comparison provision in all remaining neighbouring centres falls below the 35.22% average.

6.39 It should be noted that New Southgate and Colney Hatch Lane are part-divided between Barnet and neighbouring local authorities. Table 14 shows that New Southgate comprises 15,329 sqm across 87 units⁷, 7 of which are situated within Barnet and amount to 799 sqm. In Colney Hatch

⁷Experian Goad Category Report (06/06/07) for New Southgate. This report is not accompanied by a plan illustrating the extent of the survey area but in agreement with LB Barnet, we have assumed that a larger area has been surveyed than is perhaps recognisable as New Southgate and the resultant total unit count is too high.

Lane, 32 units (3,419 sqm) are situated in Barnet. A further 10 units situated outside the Borough make up the centre's total 3,929 sqm floorspace.

6.40 **Table 6.14: Composition of Neighbourhood Centres extending beyond LB Barnet boundary**

Centre	COLNEY HATCH LANE		NEW SOUTHGATE	
	LB Barnet	TOTAL	LB Barnet	TOTAL
Convenience	7	8	1	12
Comparison	5	8	2	14
Service	17	23	4	52
Vacant	3	3	0	9
Total Units	32	42	7	87
Total Floorspace (sqm) gross	3,419	3,929	799	15,329

Source: LB Barnet / Experian Goad Category Reports

6.41 Our assessment has largely concentrated on those units located within Barnet, but we recognise that there is additional provision which extends beyond this.

6.42 The majority of the neighbourhood centres comprise linear developments along main roads or around traffic interchanges. Grahame Park is the only exception, where the centre is embedded within a council-housing estate. The overall quality of the environment varies, with those situated along busier roads (e.g. Apex Corner, Golders Green Road) somewhat undermined by the impacts of heavy traffic; whilst others benefit from their location on quieter roads (e.g. Hampden Square, Holders Hill Circus, Colney Hatch Lane) as well as the use of trees and planting to enhance the overall environment. Those centres which would benefit from further improvement include New Southgate, Deansbrook Road, and Apex Corner. Grahame Park is considered to be the most vulnerable centre and in the most need of improvement. However, this has been recognised by the Council and the area is subject to a regeneration programme due to commence in 2009.

Summary

6.43 Our qualitative assessment has highlighted distinct variations between the district centres in terms of their scale, retail offer and overall role in the Borough. Of all the district centres, Chipping Barnet and North Finchley benefit from a superior retail offer. Chipping Barnet, with the Spires Shopping Centre has the highest representation of multiple retailers. The centre has good accessibility from a range of transport modes and a pleasant, well-maintained environment enhanced by historic market town qualities. North Finchley offers a similar higher order offer with over a third of units occupied by mainstream multiples, although it does not have an enclosed shopping centre aside from the dated Arcade. There is also scope to further enhance the quality of the shopping environment, including improvements to the public realm to facilitate pedestrian movement and bring about positive integration of the centre.

6.44 Golders Green and Mill Hill also benefit from reasonable multiple retailer representation. In Golders Green these are largely service operators, including well-known high street restaurants

and cafes, which reflect its primary role as a service destination. Despite having below the Borough average comparison and convenience provision, Golders Green has the highest number of requirements from comparison retailers which implies that there is potential for the centre to enhance its offer in this respect. In contrast, Mill Hill has the most requirements from service operators which would further enhance its role in this category. Mill Hill is also noted for its higher quality comparison, including some designer boutiques, and the centre is anchored by an M&S Simply Foodstore offering quality convenience provision.

- 6.45 Whetstone and Temple Fortune have a similar high quality offer to that in Mill Hill with a number of specialist, boutique shops. Temple Fortune has a higher than average comparison and convenience goods offer anchored by a Waitrose and M&S Simply Food store. Whetstone has a strong service destination function, with a good selection of restaurant and cafes. East Finchley is an attractive centre with a high quality environment but a limited comparison offer. The centre primarily performs a service and convenience role catering to the needs of the surrounding residential areas and key local businesses.
- 6.46 The remaining district centres in the Borough have a lower quality retail offer, with fewer multiple retailer representation and generally more limited comparison goods provision. Finchley Church End caters well for both convenience and service needs. Tesco is the key anchor but the store is somewhat dated. Further environmental improvements elsewhere in the centre would benefit overall vitality.
- 6.47 Burnt Oak and Cricklewood would also benefit from environmental improvements to enhance the quality of the shopping environment. Both centres have a high convenience offer, particularly those catering in kosher goods or to the needs of local ethnic populations, and this appears to be their core function. In contrast, Brent Street, Hendon Central and Colindale - The Hyde perform a greater service role. These centres are heavily traffic-dominated and would also benefit from environmental improvements to enhance the overall quality of the environment.
- 6.48 New Barnet is anchored by a large Sainsbury's which currently represents the main retail offer for the centre. The centre has a number of vacant units and an above average vacancy rate. There is a level of retailer interest in New Barnet and planning applications have been submitted by both Asda and Tesco for new foodstores in the centre. In addition to their recent application, Tesco have also secured planning permission for a Tesco Express which was upheld by appeal in April 2009. In the event that neither of the larger store proposals comes forward, the centre will continue to fulfil its District Centre status, in accordance with the definition set out in PPS6 (containing a supermarket or superstore and a range of other shops and services), and we therefore do not consider the need for its current position in the retail hierarchy to be reviewed.
- 6.49 The five local centres in the Borough are more comparable in terms of their overall scale and offer which largely service-orientated. East Barnet, West Hendon and Friern Barnet each benefit from having a small anchor foodstore, although this is absent in Childs Hill and Market Place. With the exception of West Hendon, the level of vacant units and floorspace is relatively low. West Hendon is also the local centre which appears most dilapidated, deprived and very much in need of enhancement. This has been recognised by the Council and the centre has been identified within the Cricklewood, Brent Cross, and West Hendon regeneration area. The quality
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of the environment varies across the centres with West Hendon, Friern Barnet, and to a lesser extent Childs Hill, being identified as those in most need of further enhancement.

- 6.50 The ten neighbourhood centres are also broadly similar inline with their status at the base of the retail hierarchy. All centres are largely service-orientated, with high representation of cafes, fast-food takeaways and other food and drink operators and those providing health and beauty services. There appears to be adequate convenience provision, usually consisting of small newsagents/convenience stores, in all centres aside from Hampden Square. The overall quality of the environment in each centre varies, with Grahame Park, New Southgate, Deansbrook Road, Apex Corner identified as those that would most benefit from environmental improvements.

7. OTHER RETAIL PROVISION

- 7.1 This section sets out our assessment of the out-of-centre convenience and non-food retail provision across the Borough; this review is designed to help identify the location, scale, type and quality of such provision in the London Borough of Barnet.

Local Parades and Shops

- 7.2 In Barnet there are approximately 54 local parades and shops which supplement the retail offer in the larger centres in the Borough. A detailed review of the retail units in these local parades was not part of this study. Whilst these centres have vacant floorspace, from a commercial point of view it is unlikely that they will attract any significant level of investment and large stores would not be appropriate as they would be out of scale with the centre.

Out-of-Centre Foodstores

- 7.3 We have undertaken a qualitative review of out-of-centre retail provision. The household telephone survey identified the market share and attraction of the main out-of-centre foodstores as outlined below and illustrated on Plan 15.

(i) Tesco Extra, Colney Hatch/North Circular Road

- 7.4 The Tesco store at Colney Hatch opened in 1988 and was extended and upgraded in 2008 to a Tesco Extra format. Prior to the extension the store comprised approximately 4,212 sqm net sales floorspace with a smaller comparison goods offer. The extension increased the net sales area to 5,975 sqm with comparison goods making up 35% of sales floorspace (excluding checkouts/lobby).

- 7.5 The store offers a wide range of food products and includes a deli, bakery, hot food counter, fish monger and butcher counter. As well as a range of non-food goods on offer, there is also an in-store pharmacy, a Costa Coffee café and a petrol filling station. The store is open 24 hours from 8:00am on Mondays to 10:00pm on Saturdays and between 10:00am and 4:00pm on Sundays. The store is relatively expansive with approximately 40 checkouts. It is well located with direct access off the North Circular and a further access off Colney Hatch Lane.

(ii) Tesco, Tilling Road, Brent Cross

- 7.6 The Tesco at Brent Cross is situated just south of the Brent Cross Regional Shopping Centre. The store opened in 1995 and comprises approximately 3,681 sqm net. The store is open 24 hours from 8:00am on Mondays to 10:00pm on Saturdays and between 11:00am and 5:00pm on Sundays. There is a good overall food offer which includes a deli, hot food counter, bakery and a fish counter. There is some provision on non-food goods as well as an in-store café, operated by

Costa Coffee, and a petrol station. As part of the proposals for Brent Cross/Cricklewood, this store will be redeveloped as a Tesco Extra with a proposed 6,446 sqm gross comparison and 5,274 sqm gross convenience goods floorspace.

(iii) Lidl, Edgware Road, Cricklewood

- 7.7 The Lidl foodstore is situated along the Edgware Road just north of Cricklewood district centre and opposite the new bus station development. The store is approximately 741 sqm net and offers a good range of food products and a number of continental varieties. However, this store is proposed to be demolished to make way for new development as part of the Brent Cross/Cricklewood regeneration scheme.

(iv) Sainsbury's, Hyde Estate Road

- 7.8 The 3,506 sqm net Sainsbury's foodstore is situated along Edgware Road between Colindale - The Hyde district centre and West Hendon local centre. The store, which opened in 1994, has good provision of parking with 630 customer spaces in addition to provision for disabled customers and those with children. The store is sizable with a good food range which includes a deli, bakery, hot food counter, fish monger and butcher services. There is also a Starbucks café, a pharmacy as well as a wide range of non-food provision including the TU clothing range, home furnishings and electrical goods.

(v) Waitrose, Ballards Lane, North Finchley

- 7.9 The Finchley Waitrose is situated on Ballards Lane just south of North Finchley district centre. The 2,516 sqm net store opened in 1994 and provides a good range of quality convenience goods and a good fresh counter offer which includes a deli, fish monger, butcher, hot food and in-store bakery. The store is easily accessible off Ballards Lane and there are customer-only parking facilities. The store is open between 8:30am and 8:00pm Monday to Saturday (with a late opening until 9:00pm on Fridays), and 11:00am until 5:00pm on Sundays.

(vi) M&S Simply Food, High Road, Whetstone

- 7.10 The M&S Simply Food store is situated off the High Road just north of Whetstone district centre. The 836 sqm net store is part of a small retail complex along with a Carpetright retail warehouse. The store offers a good range of quality convenience goods although it lacks an in-store bakery and overall it is relatively compact with just 10 checkouts.

(vii) Waitrose, Mill Hill East,

- 7.11 The Mill Hill Waitrose is part of a relatively new development which includes housing and an adjacent gym complex, situated off Bittacy Hill just north of Holders Hill Circus local centre. The store opened in 2003 with a net floorspace of 1,685 sqm and provides a range of quality

convenience goods. There is also a fresh counter offer which includes a deli, fish monger, butcher, hot food and in-store bakery. The store is easily accessible off Bittacy Lane and there is a large customer car park. The store is open between 8:30am and 8:00pm Monday to Saturday (with a late opening until 9:00pm on Fridays), and 11:00am until 5:00pm on Sundays.

(viii) Tesco Express, East Barnet Road

- 7.12 The Tesco Express is incorporated within the Esso petrol filling station on East Barnet Road and situated between New Barnet district centre and East Barnet local centre. The store is compact, comprising just 233 sqm net but offers a sufficient range of food goods to meet top-up convenience needs and is open between 6:00am and midnight every day of the week.

Out-of-Centre Retail Warehouses

- 7.13 Our assessment of the Borough has identified a reasonable level of out-of-centre retail warehouse provision with a particular concentration to the south west of the Borough along Edgware Road and close to the Brent Cross shopping complex. Identified retail parks in the Borough are outlined below and their location in the Borough is illustrated on Plan 16:

- Staples Corner Retail Park (Carpetright, ScS, PC World, Currys, Laura Ashley, JJB Sports, The Carphone Warehouse and Dreams)
- Pentavia Retail Park (Argos, Comet and Homebase)
- Friern Bridge Retail Park (Carpetright/Sleepright, Currys, Harveys/Benson for Beds/Rosebys, Halfords, Furniture village, MFI/Paul Simon, Allied Carpets, Sports World, JJB Sports and Comet)
- Broadway Retail Park (B&Q Warehouse, In Store and Tile Warehouse)
- Silkbridge Retail Park (Allied Carpets, Halfords and Comet)

- 7.14 There are also a number of free-standing stores in the Borough which include the Homebase off Rookery Way and the Homebase just south of North Finchley; B&Q on High Road just south of Whetstone and the Toys R Us off Tilling Road near Brent Cross.

- 7.15 Our analysis of the retail warehouse provision indicates a total floorspace of 60,852 sqm net across the whole Borough. There is a concentration of retail warehouse provision in the south west of the Borough and less provision in the north and east comprising the Friern Bridge retail park, the Carpetright and B&Q at Whetstone and the Homebase at North Finchley. We have categorised the provision by floorspace and it is evident that the majority of floorspace is in DIY, electronics and furniture (Table 7.1). These are traditional retail warehousing bulky goods uses and therefore town centre type retailers are not dominating the out of centre provision in the Borough.

Table 7.1: Out of Centre Retail Warehousing

Category	Net Floorspace (sqm)	Percentage of Total Retail Warehousing Floorspace (%)
DIY	15,671	26%
Electronics	12,150	20%
Furniture	8,740	14%
Mix	5,574	9%
Carpet	4,143	7%
Toys	3,538	6%
Sports	3,723	6%
Clothes	2,980	5%
Stationary	2,735	4%
Cars	1,598	3%

Source: LB Barnet / Experian Goad / Trevor Wood / GVA Grimley, 2008

- 7.16 In terms of new developments, we are aware that the 4,229 sqm Toys R Us at Tilling Road has been designated for redevelopment as part of the proposals for the Brent Cross Cricklewood development scheme. Whilst not immediately, it is also likely that the 17,803 sqm Brent South Shopping Park will also eventually be redeveloped for office purposes as part of the wider regeneration of the area.
- 7.17 We have also reviewed the outstanding commitments for out-of centre retail warehousing. Aside from the former Courts unit at Staples Corner, where two new retail units (amounting to 1,607 sqm net additional comparison goods floorspace) are currently under construction, we have not identified any further commitments for new out-of-centre development.

Summary

- 7.18 Our assessment has identified further retail provision including local shops and parades in addition to the various out-of-centre foodstores and comparison goods retailing concentrated in the identified retail parks and stand-alone stores. We have also identified some outstanding commitments although these amount to a relatively minimal creation of additional out-of-centre comparison goods floorspace. Aside from the redevelopment of the Tesco foodstore on Tilling Road, there are no other out-of-centre convenience floorspace developments in the pipeline for the Borough that we are aware of.

8. LEISURE & TOURISM

8.1 In this Section we set out our assessment of the growth in leisure expenditure over the forecast period and the potential need for new commercial leisure uses and facilities within the Borough. Unlike for retail capacity assessments, the methodologies for assessing the quantitative need for new leisure floorspace are less developed and robust. For this reason we have used both quantitative and qualitative approaches to assess leisure need across the Borough. We have also, where appropriate, provided an overview of national trends to provide a better understanding of the relative viability and performance of the different categories. This helps to provide a better understanding of the potential market interest and key drivers of development at the local level. Plans 17-19 demonstrate leisure provision for the Borough.

(i) Growth in Leisure Expenditure, 2008 – 2026

8.2 The Experian '*E-marketer*' report calculates annual consumer leisure expenditure per person on leisure and recreation goods and services (2006 price base), based upon a demographic profile of the survey area. Leisure expenditure as defined by Experian includes recreation and sporting services, cultural services, games of chance, cafés/bars/restaurants, accommodation services and hairdressing salons and personal grooming establishments.

8.3 We have projected available leisure expenditure per capita up to 2026, based on the population projections from the survey area, and assumed an 'ultra long term' growth rate in available expenditure of 2.4% per annum for leisure goods. This 'ultra long term' growth rate figure is derived from Experian Business Solutions.

8.4 The annual average consumer expenditure per person on leisure goods in the survey area is currently estimated to be £2,436 (2006 prices). Per capita expenditure is projected to increase to £3,734 by 2026 (see Table 8.1). At present (2008) per capita expenditure on leisure goods in the study area is well above the national average (£1,817).

Table 8.1: Per Capita Leisure Goods Expenditure Adjustments – Total study area

2008 (£)	2011 (£)	2016 (£)	2021 (£)	2026 (£)
2,436	2,616	2,945	3,316	3,734

Source: Experian Business Solutions, Emarketer, 2008

8.5 If we apply the per capita goods expenditure to the total population of the survey area, it highlights that there is currently £1,670m available leisure expenditure in the survey area. This is expected to rise to over £2,846m by 2026 (Table 8.2).

Table 8.2: Total Leisure Expenditure survey area

	2008 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)
Total	1,669,605	1,831,685	2,126,658	2,459,596	2,845,892

Source: Experian Business Solutions, Emarketer, 2008

8.6 The demand for additional quality leisure facilities will naturally grow as the population increases within the survey area. The existing designated centres in Barnet should remain the main policy focus for leisure growth. Leisure provision should also come forward as part of mixed use new developments. At Brent Cross, outline proposals for the creation of a new town centre include a mix of leisure uses totalling circa 26,078 sqm gross as well as hotel and conference facilities amounting to an additional 61,264 sqm gross.

(ii) Cinema Provision

8.7 According to Dodona Research (2006), the number of new cinema screen openings has slowed significantly over recent years, following a period of dramatic growth during the 1990s. During this period there was a significant increase in new multiplex cinema developments, primarily in out of centre locations, either as stand-alone schemes or as anchors to leisure parks.

8.8 The slowdown in development is partly explained by the Government's town centres first policy, which has effectively curbed new multiplex cinema and commercial leisure developments in out of centre locations. Although there has been a resultant increase in investment in smaller cinemas in town centre locations, multiplexes have maintained and increased their share of cinema screens to 73% (i.e. the number of cinemas has decreased but the number of screens has increased). Research indicates that there are now approximately 200 single screen cinemas in the UK and only 16% of all cinemas have less than four screens.

8.9 According to Dodona, the number of multiplex cinemas (and screens) opened in 2005 was the lowest since 1987. The latest research indicates an increase in openings in 2006, with eight new multiplexes planned comprising 64 screens. Although Dodona forecast an increase in new investment and development over the short term, the growth will continue to be modest compared with previous trends due to the increase in sophisticated home entertainment systems, digital television and other technological advances.

8.10 The household survey identified that some 51.8% of people in the survey area visit a cinema. Cinema trips vary across the study area, with the highest rate in Zone 7 (68%) and the lowest in Zone 3 (41.1%). There are a total of four cinemas located within Barnet and together they attract at least 35% market share (Table 8.3 below).

Table 8.3: Cinema visitation in Barnet

Cinema	No. of Screens	Market Share (%)
Vue Cinema, Great North Leisure Park	8	15.4
Odeon, Great North Road	5	10.4
Cineworld, Staples Corner Retail Park	6	5.8
Phoenix Cinema, East Finchley	1	3.7

Source: Household Telephone Survey, September 2008 and Dodona Research, 2006

8.11 The survey may not captured the full market share of the Vue Cinema at the Great North Leisure Park as its possible there has been some confusion between this Vue Cinema at the leisure park

near to North Finchley and the Vue at the O2 Centre on Finchley Road. We expect the market share is actually somewhat higher than 15.4%.

- 8.12 The survey results highlighted 26.2% cinema goers that either did not know which cinema they usually visited, or that the location varied. However, it can be reasonably expected that the majority of these visits would be to those cinemas within Barnet or to the Vue Cinema at the O2 Centre on Finchley Road in LB Camden. A further two cinemas located outside of the Borough also achieved notable market shares, these include the Odeon in Muswell Hill (3.6%) and the Vue Cinema in St. Georges Shopping Centre, Harrow on the Hill (2.6%). Other cinemas situated outside of the Borough account for the remaining 19.7% market share. Overall, we consider there to be reasonable cinema provision in the Borough, which in addition to other nearby locations with cinema facilities, is considered sufficient not to warrant additional provision until the market demand dictates otherwise.

(iii) Ten Pin Bowling and Bingo

- 8.13 Tenpin bowling has been established as a commercial leisure activity in the UK for over 40 years, but after a period of growth in the 1980s, decline set in during the early 1990s. Since then, however, a spate of investment in new centres and refurbishments by recognised chain brands has revitalised the industry to a degree.
- 8.14 Mintel research (2006) has identified an increase in development of high-end quality venues in central locations. However, long term attraction and viability of this sector of the commercial leisure market will depend on increasing its appeal to a wider demographic and providing a more sophisticated eating/drinking offer.
- 8.15 There are more recent signs that the concept is already beginning to evolve to generate increased customer interest and visits. For example, the Bloomsbury Bowl Lanes in London offers a very popular 1950s American themed bowling venue with ancillary karaoke rooms, venue rooms for hire, DJ booths, bars, small scale cinema and a venue for bands and live performers/comedy nights. This more integrated leisure/entertainment experience could represent the way forward for this sector of the market.
- 8.16 There is currently only one ten-pin bowling facility in Barnet which is the Finchley Hollywood Bowl at Great North Leisure Park. However, the household telephone survey identified that just 1.4% of people across the survey area considered bowling facilities to be lacking within a reasonable distance of their home.
- 8.17 There is also only one bingo hall site in Barnet, the Beacon Bingo in Cricklewood, which has a capacity of over 2,700 players. From the household telephone survey just 0.4% indicated a lack of bingo facilities. There is therefore a lack of consumer demand for bowling and bingo facilities in Barnet. Rather than planning for further facilities, if the market proposes additional provision this should be considered on the basis of national policy including the sequential approach town centre first policy and local circumstances.
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(iv) Health & Fitness Clubs/Swimming Pools

- 8.18 According to Mintel's research report on UK Health and Fitness Clubs, the value of this sector increased by 62% between 1998 and 2002 (at current prices). In real terms the growth was a substantial 49%. The growth of this sector has been driven by a number of factors, including significant changes in lifestyles and a resultant shift away from competitive sports towards those focused on personal health and fitness development.
- 8.19 The expansion of this sector has continued in recent years, although growth has been characterised by significant consolidation in the industry. For example, Virgin Active recently took control of the Holmes Place leisure clubs. The industry is forecast to remain strong throughout this decade and beyond as personal health and fitness awareness continues to develop.
- 8.20 We have assessed the level of health and fitness club provision in Barnet which is illustrated on Plan 18. The provision we have identified broadly comprises multiple leisure operators such as Virgin Active, LA Fitness and other privately run centres. There are also public leisure centres operated by the Council. The household survey identified 23.1% of people from the survey area use gyms/health and fitness clubs and Table 8.4 below highlights those destinations with the greatest market share.

Table 8.4: Location of most popular health and fitness facilities

Destination	% Market Share
North Finchley	8.8%
Central London (West End)	8.0%
Mill Hill	7.4%
Muswell Hill	5.8%
Borehamwood	5.6%
Cricklewood	4.7%
East Finchley	4.6%
New Barnet	4.5%
Swiss Cottage	4.2%
Hendon Central	3.9%
Southgate	3.0%
Other	39.5%

Source: Household Telephone Survey, September 2008 and GVA Grimley, 2008

- 8.21 The table highlights that North Finchley is the most popular destination attracting 8.8% although this is only marginally greater than Central London (West End) which draws 8%. Mill Hill is next most popular with a market share of 7.4%. The household survey also questioned respondents

on facilities they felt to be lacking within a reasonable distance from their home which identified the following levels of deficiency:

- Swimming pool (6.3%)
- Leisure/fitness centre (4.0%)
- Sports Facilities (0.3%)
- Tennis Courts (0.3%)

8.22 In terms of planning for further facilities, we advise that health & fitness clubs should be encouraged, ideally as part of more comprehensive mixed use retail/residential scheme, within existing designated centres. The need for this type of leisure activity will also be determined by market interest and demand.

(v) Evening Economy Offer

8.23 According to the household survey some 33.3% of respondents visit pubs and clubs in the study area. Unsurprisingly, given the level of provision, Central London is the most popular destination with a 17.9% market share. North Finchley has the next highest market share with 4.9% of respondents from the survey area visiting the centre for pubs and clubs, although the majority of these are derived from Zones 3-5 which surround the centre. Other centres in Barnet have lower market shares with Edgware attracting just 3.2%, which is only slightly greater than New Barnet's 3.0% and Mill Hill's 2.7%. Overall, centres outside of the Borough such as Camden Town, Hampstead and Borehamwood are more popular for their evening economy offer.

8.24 There is considerable scope for centres in Barnet to improve provision and enhance their evening economy offer, particularly in North Finchley and other centres with high levels of accessibility such as Golders Green and East Finchley. However, this would call for a coordinated approach to ensure an inclusive and safe night time economy which would extend the vitality and viability of centres into the evening.

(vi) Restaurant/Café Expenditure

8.25 According to Experian Business Strategies (2008) the average person in the catchment area spends £1,577 per annum in restaurants/cafés. Experian also estimate that people's average spend on leisure goods, such as eating out, is increasing by 2.4% each year. Currently the total expenditure available for restaurant/cafés in the survey area is £1,080.1m. This is forecast to increase to £1,842.4m in 2021, as shown by Table 8.5.

Table 8.5: Restaurant / Café Expenditure Forecasts – Total Survey Area

Projection	2008 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)
Total Catchment	1,080,939	1,185,873	1,376,845	1,592,396	1,842,493

Source: Experian Business Solutions, Emarketer, 2008

- 8.26 This does not in itself justify a more flexible policy with regard to primary shopping frontages. We advise that retail uses should continue to be protected to underpin the vitality and viability of the Borough's major and district centres, as well as the local and neighbourhood centres. However, we consider that it will be appropriate to maintain a more flexible policy approach in secondary frontages, enabling the representation of A3 and A4 uses which can enhance the vitality and viability of the centre and encourage longer trip times. Tighter control of A5 (hot food/take away) uses may be appropriate for amenity and environmental reasons.

(vii) Hotels

- 8.27 We have reviewed provision of large hotels based on the number of multiple hotel operators represented in the Borough. Table 8.6 highlights that there is only one in-centre hotel, the luxury Crown Moran hotel, situated along Cricklewood Broadway in Cricklewood district centre. The majority of the hotels we have identified offer budget accommodation located at major transport interchanges such as the Days Inn off the M1 London Gateway Services and the Express by Holiday Inn off the North Circular Road. Other hotels are strategically located in close proximity to leisure or shopping attractions such as the Holiday Inn opposite Brent Cross Shopping Centre and the Comfort Inn at the Great North Leisure Park. In contrast to other provision, Hendon Hall Hotel is an out-of centre country house hotel set in extensive grounds and offering 4 star luxury accommodation and a venue for weddings and weekend breaks.

Table 8.6: Hotels in Barnet

Hotel	Location	In/Out-of Centre	Type	Number of Rooms
Comfort Inn	Leisure Way, Finchley	Out-of-Centre	Budget	88
Crown Moran Hotel	Cricklewood Broadway, Cricklewood	In-Centre	Luxury	116
Days Inn	London Gateway Services, Mill Hill	Out-of-Centre	Budget	200
Express by Holiday Inn	Regents Park Road/ Finchley Road	Out-of-Centre	Budget	83
Hendon Hall Hotel	Ashley Lane,	Out-of-Centre	Luxury	57
Holiday Inn	Tilling Road, Brent Cross	Out-of-Centre	Standard	154

Source: GVA Grimley, 2008

- 8.28 The Brent Cross/Cricklewood planning application includes proposals for a new hotel and conference facilities involving approximately 61,264 sqm gross floorspace. We are also aware of recent planning approvals for a Travelodge at 214-218 Cricklewood Broadway (64 rooms) in addition to a 121-bed hotel at 112-114 Cricklewood Lane. Consent has also been granted for the reinstatement of the Railway Hotel on Station Road in Edgware involving an extension to the rear to provide a new 91-bed hotel in the centre. We have illustrated the existing and approved hotel provision in the Borough on Plan 19.
- 8.29 The GLA Hotel Demand study (June 2006) provides a net additional rooms requirement for Barnet of 500 rooms. This figure is calculated drawing on low, medium and high scenarios for London hotel requirements up to 2026 which are produced based on different factors, largely

macro-economic. It should be noted that these assume a high growth rate between 2007-2016, which does not reflect the global downturn in the economy currently being experienced. Hotel rooms required by sub-region and Borough are forecast by a mixture of qualitative and quantitative analysis: step one considers the planning pipeline for 2006-2010 reported in the London Hotel Development Monitor produced by Visit London; step two employs quantitative techniques to forecast over the 2001-2026 period at a sub-region and the Borough level; step three involves small adjustments to the Borough level forecasts taking into account future developments or key drivers including, transport links, proximity of tourist attractions, regeneration initiatives and site availability.

- 8.30 In Barnet three hotels have planning permission, which together would provide 276 rooms. We have been unable to verify whether these rooms have been incorporated within the Visit London's planning pipeline data for Barnet.
- 8.31 The level and type of hotel provision in Barnet, supplemented by various new developments coming forward, is considered reasonable to accommodate the needs of visitors to the Borough. However, we would recommend that provision is closely monitored and remains responsive to market demand. In accordance with the town centres first policy and the sequential approach, new development should be directed towards existing centres and, based on individual merits, appropriate locations well-served by the strategic transport network.

(viii) Cultural Facilities

- 8.32 Our review of cultural and tourist facilities in Barnet has identified the following range of facilities on offer.
- **Theatres** (e.g. Arts Depot, North Finchley; The Bull Theatre, Chipping Barnet)
 - **Galleries** (e.g. Bertold Gallery)
 - **Museums** (e.g. Royal Air Force Museum; Church Farmhouse Museum)
 - **Nature Reserves** (e.g. Barnet Gate Wood; Oak Hill Woods and Meadow)
- 8.33 The above is somewhat limited, however in view of the close proximity of London and the reasonably suburban nature of the Borough we do not consider there to be specific opportunities for additional provision. However the emergence of opportunities to enhance such facilities should be welcomed and considered on their merits.
- 8.34 In addition to the cultural facilities above, there are also 16 public libraries in the Borough which are categorised into six 'Leading Libraries' and ten 'Local Libraries'. However, library buildings range in age from 1900 (Hampstead Garden Suburb and Friern Barnet) through to 1991 (Chipping Barnet) with the majority dating from the 1950s and 60s.
- 8.35 According to Barnet's emerging Libraries "Strategy" there are now significant issues for many of these buildings, including location, maintenance and projected building life, fitness-for-purpose to
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provide modern library services, and longer-term sustainability issues. The report rated seven of the 16 libraries as a high priority for action and Hendon library as the busiest library in Barnet. The majority of libraries in the Borough are located in the historical centres of population, but these may not be in the most suitable locations anymore due to retail or housing development, new transport routes, and changing social patterns that affect how people use libraries.

Summary

- 8.36 Our leisure expenditure projections have identified significant growth in the leisure sector across the study area. Given that the Government's objective is to maintain and enhance the vitality and viability of town centres, we recommend that the strong growth in leisure expenditure should be directed to defined centres in the Borough.
- 8.37 Our assessment of the leisure sector in Barnet indicates a relatively good provision and choice of commercial leisure and tourist facilities. However, there is a reasonably high level of leakage from the pub/club and restaurant sectors most notably to Central London as well as other competing centres outside of the Borough. It is important that centres in Barnet maintain and enhance their provision of pubs and restaurants and other leisure facilities to encourage a healthy evening economy and to meet the needs of their catchment populations.

9. OFFICE MARKET ANALYSIS

- 9.1 In this section we set out our assessment of the commercial office market within Barnet. We have looked at office provision in Barnet by examining changes in total stock of office floorspace, development activity, demand levels, stock availability and rental levels. It should be noted that this assessment is set in the relatively uncertain market conditions prevailing in 2008, which are having a noticeable effect on short term demand. This is due to a reduction in investment and therefore demand for employment land including office space. Over a longer period (more than ten years) it is expected that there will be a return to less volatile patterns of supply and demand and long term trends will remain.
- 9.2 It is also pertinent to acknowledge the overall changing of working patterns within the UK. The theory is that the increase in home working, hot-desking and cost pressures on employers to use space more cost effectively results in higher employee densities per sqm.
- 9.3 A recent study⁸ asserted that there was some evidence to support changing practices, with big employers such as BP and IBM requesting lower employment densities for their offices. Anecdotal evidence suggests they were encouraging more hot-desking and flexible working patterns within their organisations. However, a quantitative study of the South East⁹ concluded that employment densities were not changing overall in the region and did not make any strong conclusions on changing work practice.
- 9.4 While there is no quantifiable evidence to suggest that employment densities are changing, the view that they will alter in the future is supported by a recent report by the Chartered Management Institute¹⁰. They predict that the workplace will undergo significant change by 2018, citing that pressures to reduce carbon footprint and an ageing population, which will require more time looking after elderly relatives, as key reasons for this change. This will result in more working from home and possibly an alteration in the number of days that an individual works per week.
- 9.5 While there is a strong consensus that working practices will change, there is a lack of detailed quantitative studies to give an idea of what it will mean for employment density requirements in the future.
- 9.6 In order to assess office floorspace requirements in Barnet, the methodology considers the quantitative need for new office floorspace, supplemented by discussions with local agents to understand office requirements within Barnet from a qualitative perspective.

⁸ Roger Tym & Partners, Ramidus Consulting & King Sturge (2006), The Use of Business Space in London

⁹ DTZ Pineda (2004) Use of Business Space and Changing Working Practices in the South East

¹⁰ Chartered Management Institute (March 2008): Management Futures – The World in 2018

Overview

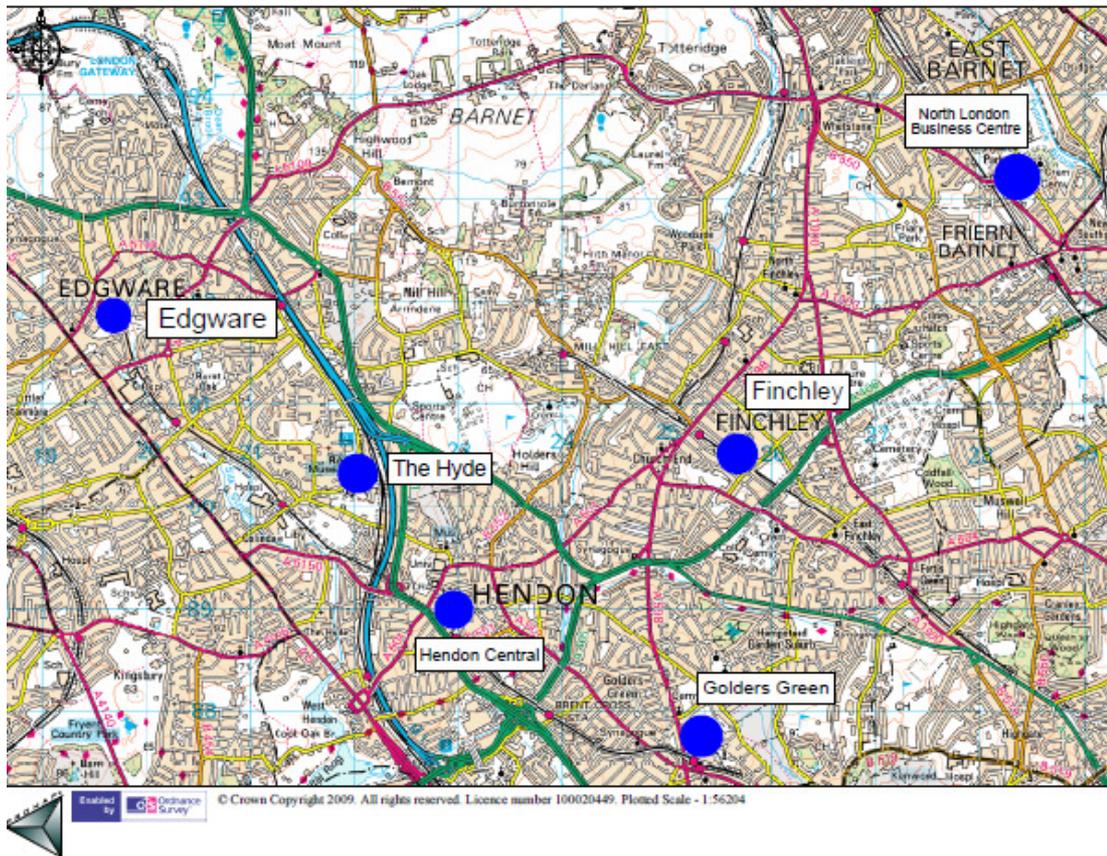
- 9.7 Office related economic activity is concentrated in Central and Eastern London with over 75% of office floorspace located in these areas. In this wider London context, Barnet is not viewed as a strategic office location. We consider that, within the sub region of North London (defined in this report as the Borough's of Barnet, Enfield, Haringey and Hackney) where logistics and distribution are the major drivers of economic activity, Barnet is viewed as the major office location.
- 9.8 The growth agenda in North London, with large scale population and housing increases forecast, means that employment and more specifically office type employment is set to grow. The likelihood is that this growth will be concentrated in Barnet due to its position as the office location within the sub-region, most likely in major regeneration areas such as Brent Cross Cricklewood.
- 9.9 For these reasons, while current market trends indicate only a small increase in demand for office floorspace in Barnet in the short term, the GLA London Office Policy Review (2006) forecasts a larger increase in demand for office space to 2026.
- 9.10 Given the nature of these projected increases, which are to be in the Financial & Business Services sector, demand is likely to be for new stock of a higher specification than the units which are currently available. There may also be increased demand for larger units as companies grow and expand, or move from Central London to more viable suburban locations such as Barnet.
- 9.11 Taking this increased demand and the nature of current stock into account, the demand for high specification, larger offices is unlikely to be met unless new stock is built. It is our view that it is likely to be the development at Brent Cross Cricklewood that will meet a large part of this demand however this is as yet untested in the market in terms of demand and rents.

Office Locations

- 9.12 An analysis of the current office market within Barnet indicates that there are six major office locations within the Borough highlighted in Figure 9.1 on the following page. Four of these locations are in or around the town and district centres (Edgware, Hendon, Golders Green, Finchley¹¹) while the remaining two areas are business park locations (North London Business Centre & The Hyde).
- 9.13 We have observed that the office stock tends to be similar in each of the major centres, with a predominance of office uses ancillary to the main retail uses. The exception to this is the North London Business Centre and The Hyde where a mix of office sizes and industrial uses are set in purpose built business park developments.

¹¹ Includes East Finchley and Finchley Church End

Figure 9.1: Office Centres in Barnet



9.14 The majority of office stock in Barnet is of a secondary nature, and there is a predominance of units sized (0–465 sqm / 0–5000 sqft). These units are located within the town centres or along their periphery in line with current UDP policies and national guidance through PPS6 'Planning for Town Centres'. Barnet has a concentration of local business support and financial firms, such as accountancy and solicitors firms and our discussions with agents suggest that these businesses serve their locality and cluster in town centres due to the easy rail access to central London. The individual office centres within Barnet are described in more detail below.

(i) North London Business Centre

9.15 The North London Business Centre has only grade 'A' office space, the highest quality type of office stock, with rental values of around £215 per sqm (+£20 per sqft). The Centre is located at the north western edge of Barnet between Whetstone and North Finchley, off Oakleigh Road North. The nearest underground station is Arnos Grove and Oakleigh Park and New Southgate national railway stations are within 1.5 miles distance. Barnet Council occupy a significant amount of floorspace within the centre.

(ii) Edgware Town Centre

- 9.16 Edgware is principally a retail and residential area with some ancillary office space, primarily above existing retail units. There are some new developments in the area however the majority of the existing office stock appears to be second grade. Office rents in Edgware are some of the highest in Barnet at around £194 per sqm (£18 per sqft) for prime stock, and £161 per sqm (£15 per sqft) for secondary stock.

(iii) Finchley

- 9.17 Finchley is an area situated to the north of Hampstead Heath at the southern end of the Borough. The North Circular runs through Finchley, separating Finchley Church End from East Finchley. The High Road, which runs off East Finchley, is a busy road with multiple retail outlets and the former-UK headquarters of McDonalds which is now used by The Institute – Adult Education for North London. Finchley Church End accommodates office buildings at Gateway House on Regents Park Road, Arcadia Avenue, Winston House in Dollis Park and The Court. Rents for grade 'A' stock in Finchley are approximately £194 per sqm (£18 per sqft). Secondary rents are approximately £161 per sqm (£15 per sqft).

(iv) The Hyde

- 9.18 The Hyde is situated at the point where West Hendon Broadway meets Edgware Road, immediately to the west of the M1 motorway. The Hyde is a business and industrial estate which includes office (B1a), light industrial (B1c) and storage and distribution (B8) uses. Major office occupiers include Barnet Primary Care Trust. The primary office stock achieves rental values of up to £172 per sqm (£16 per sqft). The secondary stock, such as that found at Hyde House, has a rental value of circa £107 per sqm (£10 per sqft), which is lower than in other office centres in Barnet with the exception of Hendon Central.

(v) Golders Green

- 9.19 Golders Green is predominantly a retail centre with ancillary office uses, typically above retail units. The area is currently the subject of a Business Development Pilot, the first phase of which has been funded by the London Development Agency (LDA). Barnet's Strategic Development Unit business development strategy for Golders Green aims to unite the business community and the Council in partnership, in order to improve the environment and raise the profile of Golders Green as a retail and business destination. There are no multi-storey office blocks in the area and the offices that are present are all secondary stock, commanding rents of around £161 per sqm (£15 per sqft).

(vi) Hendon Central

9.20 Hendon Central is located between Brent Cross and Colindale and benefits from good transport links; it is directly served by the London Underground Northern Line and Hendon railway station is in close proximity. The majority of stock is part of mixed-use schemes, although there are some large single use office units. Rents for prime stock are approximately £161 per sqm (£15 per sqft) and £107 per sqm (£10 per sqft) for secondary stock. This is slightly lower than the other identified office centres in Barnet.

(vii) Brent Cross/Cricklewood

9.21 The Brent Cross/Cricklewood area is not currently a recognised office location. However, the scale of proposed development as part of the regeneration scheme will mean that, in the future, it will be seen as a major office location. The planning application which has been submitted to the London Borough of Barnet for approval seeks consent (amongst a variety of other uses) for offices, industrial and other business uses within Use Classes B1-B8. It is estimated that it will provide approximately 450,000 sqm (4,800,000 sqft) of new business space, a significant proportion of which will be office (B1a) use. The area has strong transport links to the M1, the North Circular, the A5 and a new Midland Mainline railway station is proposed as part of the current planning application.

9.22 It is the view of local agents that the development will only provide office space attractive to sizeable businesses from outside of the Barnet area such as national firms. This is a contrast to the current office mix in Barnet which comprises mainly small firms and second grade office stock and the majority of relocations occurring within the Borough. All the agents we consulted believe that the proposals would not have a significant impact on the current office market, but will bring about a change in the office market dynamics within the Borough

Office Stock

9.23 Office stock within London and England as a whole has grown significantly since 1998, however stock within Barnet has remained relatively constant, as demonstrated by Table 9.1 below.

Table 9.1: Office Centres in Barnet

Area	1998 (000' sqm)	2007 (000' sqm)	% change (1998-2007)
Barnet	445	446	0.2%
London	28,983	28,498	18.8%
UK	78,973	96,700	22.5%

Source: Office for National Statistics

9.24 We have highlighted that Barnet's stock is largely of a secondary nature and, aside from Brent Cross/Cricklewood, there is limited new development coming forward onto the market. The nature of the stock in locations such as Edgware town centre (floorspace above retail units or within of mixed use developments) dictates that stock will be mostly secondary or, if housed in previously residential premises, not designed to suit office requirements.

- 9.25 Agents have indicated that new stock currently under development is also of a secondary nature in order to suit the low rental requirements of existing firms in the area. Reflecting the needs of the market, the majority of office stock in Barnet is 465 sqm (5,000 sqft) or less in size, with a shortage of units of more than 465 sqm (5,000 sqft). Vacancy levels within the Borough are consistent with those in the South East region and nationwide as highlighted in Table 9.2.

Table 9.2: Barnet Commercial Property Vacancy Levels

Area	Vacancy Rate (%)
Barnet	9%
London	9%
UK	9%

Source: VOA, 2006

Development Activity

- 9.26 Latest data from the Annual Monitoring Report and the London Borough of Barnet shows that the majority of office developments coming forward within Barnet are similar to the existing stock with a focus on small, supplementary office units. Office space tends to be a secondary use with the main focus of development predominantly residential, retail or industrial with the exception of proposed development at Brent Cross/Cricklewood involving circa 400,000 sqm (4.3million sqft) new office floorspace. An outline of current commitments and schemes in the pipeline for B1a office floorspace (sqm gross) totalling 29,521 sqm is set out in Table 9.3 below

Table 9.3: Barnet Office Developments with planning consent

Site Location	Floorspace (sqm gross)
221 Golders Green Road	2,845
Barnet Trading Estate, Park Road (<i>demolition has commenced</i>)	2,715
Meadow Works, Great North Road	2,664
135-177 Granville North	2,635
Tudor House, Llanvanor Road	2,500
46 Watford Way	2,111
land to the rear of 2-24 Lytton Road	1,792
car park to the rear of 2-24 Regents Park Road	1,379
land to the rear of 30-100 Colindeep Lane	1,253
30 & 32 Friern Park	1,203
Old Laundry Works, Falkland Road	1,167
181 Victoria Road	1,100
2 Lyttelton Road	1,065
779-783 Finchley Road	1,000
Former Royal Oak Public House, 1117 Finchley Road	901
Green Point, The Hyde, Edgware Road	569
Former RAF East Camp Site, Aerodrome Road	465
Blocks C1 and C2 at Former RAF East Camp Site, Aerodrome Road	250
Hartley Hall, Flower Lane	1,907
TOTAL	29,251

Source: AMR / LB Barnet

Demand

- 9.27 Wider trends show that economic growth, particularly within London, is primarily driven by the Financial & Business Services sector. It is not yet clear to what extent this will alter given current economic conditions, however the long term economic projections of growth in this sector suggest that demand for office accommodation across London is likely to continue to rise.
- 9.28 The current trend for Barnet, according to local agents, is a slowly increasing level of demand for office space. Much of this is intra-Borough demand and involves local businesses swapping and changing their premises between each other, as opposed to new businesses moving into Barnet from outside the Borough. The majority of demand is for units of less than 465 sqm (5,000 sqft), which is consistent with the Borough's current office stock profile. Local agents indicate that the current supply in the Borough is adequately meeting demand.
- 9.29 However, agents also highlight that larger firms looking to relocate to Barnet from central London, in response to increasing prime rents and lack of space, fail to do so due to the lack of suitable stock. These firms tend to 'leap frog' Barnet and relocate into greenbelt areas in Hertfordshire and locations beyond the M25, such as St Albans. This lends support to the view that development at Brent Cross Cricklewood would deliver stock more suitable to larger occupiers and alter the office market in Barnet.
- 9.30 Table 9.4 sets out the anticipated need for additional office floorspace in Barnet and other comparable Boroughs. This is derived from the London Office Policy Review and highlights the scale of planned office floorspace increases up to 2026 in Barnet.

Table 9.4: Need for additional Office floorspace

Borough	2006-2011	2006-2016	2006-2021	2006-2026
Barnet	458,296	898,345	1,383,655	2,793,992
Haringey	82,912	480,204	739,364	965,213
Enfield	191,593	479,939	753,021	974,843
Waltham Forest	74,492	252,153	417,127	553,846
London	25,110,000	47,952,000	66,571,391	82,609,391

Source: London Office Policy Review

- 9.31 Local agents believe that if demand for office space does increase significantly in line with the projections set out above, new stock will be incorporated into large regeneration schemes such as Brent Cross/Cricklewood, rather than the secondary town centre units which currently exist.

Take-Up

- 9.32 Take-up in the Barnet office market has been relatively subdued in recent years, with a particular lack of noteworthy deals occurring in 2007/8 according to local agents. This is in contrast to the average take-up rates in the Central and East London office market areas (which include the West End, The City and the Docklands areas) where take-up has remained strong. However,

take-up has also been slowing in other suburban centres and it has been especially weak in North London as a whole.

- 9.33 An analysis of office deals listed on EGI highlights that the average take up of office space in Barnet over the last 10 years is approximately 7,000 sqm (75,350 sqft). Reflecting the predominance of smaller units in Barnet, the majority of deals involved units of less than 185 sqm floorspace with an average of six deals per year. In the same period of time there has been only one deal involving floorspace in excess of 1,850 sqm as highlighted in Table 9.5.

Table 9.5: Annual average Office take-up in Barnet (1998-2008)

Floorspace	Barnet average annual take-up & number of deals		
	Absolute (sqm)	% Total	Average number of deals
<185 sqm	692	10%	6
185 – 465 sqm	953	13%	3
465 – 1,850 sqm	2,069	29%	9
1,850 sqm +	3,448	47%	1
Total	7,162	100%	5

Source: EGI

Availability

- 9.34 In Barnet, total availability in the office market is currently approximately 12,000 sqm (130,000 sqft) according to EGI and our discussions with local agents. Table 9.6 below indicates that the majority of this availability involves units between 465 to 1,850 sqm floorspace.

Table 9.6: Office availability in Barnet (March, 2008)

Floorspace	Available floorspace (sqm)	Annual take-up (sqm)	Notional Years Supply
<185 sqm	844	692	1
185 – 465 sqm	1,347	953	1
465 – 1,850 sqm	5,788	2,069	3
1,850 sqm +	4,076	3,448	1
Total	12,055	7,162	2

Source: EGI

- 9.35 When availability is compared with average annual take up rates over the last ten years it suggests that supply in Barnet is reasonably tight. In relation to annual take up trends over the last 10 years a total notional supply of two years office stock is available in the Borough. This is generally regarded as a fairly tight supply. This level of availability is also consistent with the local agents' view that supply meets current demand and opportunities to attract larger occupiers from outside the borough are restricted due to the lack of available, suitable stock. It is the view of agents that there is adequate supply of smaller units but that there are also many sites that are considered poor quality stock.

9.36 A major factor cited by agents is lack of availability of large scale developments offering Grade 'A' office space (discounting the forthcoming development at Brent Cross/Cricklewood). The agents' view reveals that out of town business parks, such as the North London Business Centre, are unlikely to be successful in attracting large scale employers unless they are located within regeneration areas such as around Cricklewood, Brent Cross and West Hendon, and are within close proximity to good transport links. As such, the agents were unanimous in their view that Barnet's current office stock is highly unlikely to attract large, significant occupiers, and demand will continue to be focussed on smaller, local occupiers until a time when developments such as Brent Cross/Cricklewood become operational.

Future Need

9.37 Data provided by the London Office Policy Review shows that Barnet has had more stock permitted compared to other Boroughs of Haringey, Enfield and Waltham Forest. However, a total floorspace of 1,858 sqm (20,000 sqft) permitted at the end of 2005, remains an insignificant amount compared to London as a whole. This reinforces the view that North London is not considered an office location. The small scale development permitted further emphasises the overall lack of office stock in the Borough and raises potential concern that Barnet will not be able to meet future demand given the lack of forthcoming developments. Table 9.7 outlines office capacity at 2005.

Table 9.7: Office capacity by Borough (End 2005)

Borough	Floorspace under construction (sqm net)	Permitted floorspace (sqm net)	Gain to 2006 stock from permissions (sqm net)	Total potential gain from 2006 (sqm net)
Barnet	0	1,858	1,858	1,858
Haringey	0	0	0	0
Enfield	0	0	0	0
Waltham Forest	0	0	0	0
London	964,767	5,019,759	4,268,383	5,233,145

Source: London Office Policy Review

9.38 Further evidence of the potential shortfall in future need is demonstrated in Table 9.8 on the following page which sets out office capacity as a proportion of potential need in London from 2006 to 2026. Barnet's current capacity as a proportion of its need is significantly low. Between 2006 and 2011 Barnet is forecasted to possess 4% of its potential need compared to London which has 224%. This disparity widens throughout the period 2006 to 2026 for which Barnet is predicted to possess just 1% capacity compared to potential need while London will retain 68%.

Table 9.8: Office capacity and potential need by Borough (2006 - 2026)

Borough	Floorspace Need (preferred scenario) (000' sqm net)				Gain to Stock Capacity (End 2005) (000' sqm net)			Total Capacity as Proportion of Need (%)			
	2006-2011	2006-2016	2006-2021	2006-2026	U/C	Permitted	Total	2006-2011	2006-2016	2006-2021	2006-2026
Barnet	43	83	129	167	0	2	2	4%	2%	1%	1%
Haringey	8	45	69	90	0	0	0	0%	0%	0%	0%
Enfield	18	45	70	91	0	0	0	0%	0%	0%	0%
Waltham	74	252	417	554	0	0	0	0%	0%	0%	0%
London	2,332	4,455	6,184	7,674	965	4,268	5,233	224%	117%	85%	68%

Source: London Office Policy Review

Rents

- 9.39 At a Borough level top rents for Grade 'A' Office space are £215 per sqm (£20 per sqft) for newly built prime stock. This will of course alter according to the location of the property and quality of the area. Local agents consider rents of this magnitude could be achieved at the North London Business Centre, Edgware Town Centre and are likely to be achieved at Brent Cross/Cricklewood once it is developed. Secondary rents in Barnet vary between £107 per sqm (£10 per sqft) and £161 per sqm (£15 per sqft) as demonstrated in Table 9.9 below.

Table 9.9: Rental Values for 'A' Grade and Secondary Stock in Barnet

Location	Grade 'A' Stock (£ per sqm)	Grade 'A' Stock (£ per sqft)	Second-hand Stock (£ per sqm)	Second-hand Stock (£ per sqft)
North London Business Centre	+£215.00	+£20.00	n/a	n/a
Edgware	£194.00	£18.00	£161.00	£15.00
North Finchley	£194.00	£18.00	£161.00	£15.00
The Hyde	£172.00	£16.00	£107.00	£10.00
Golders Green	n/a	n/a	£161.00	£15.00
Hendon Central	£161.00	£15.00	£107.00	£10.00
Brent Cross/Cricklewood*	£215.00	£20.00	n/a	n/a

Source: GVA Grimley and Local Agents, November 2008 *anticipated values

- 9.40 In the current market, the North London Business Centre achieves the highest rents, with top rents of over £215 per sqm (£20 per sqft). In the town centres, Edgware and North Finchley achieve the highest top rents at levels of £194 per sqm (£18 per sqft). Lower levels are achieved at The Hyde and Hendon Central of £172 per sqm (£16 per sqft) and £161 per sqm (£15 per sqft) respectively and offers an indication of the varying quality in stock amongst the different office locations in the Borough.
- 9.41 In terms of second hand stock rental levels are similar in the three town centres of Edgware, North Finchley and Golders Green. Rental levels achieved in these centres are circa £161 per

sqm (£15 per sqft). This compares to the lower levels of £107 per sqm (£10 per sqft) in The Hyde and Hendon Central.

Summary

- 9.42 Examples of existing stock can be found in all Barnet's town centres, most notably in Edgware town centre and Finchley and Golders Green district centres. These centres are typified by being in predominantly residential areas, with office floorspace located in purpose built units, above high street retail units or within converted residential buildings.
- 9.43 We have identified a single office market operating within Barnet at present in that supply largely consists of small units in lower grade stock located in town centres and the two business parks. As such, supply is adequate to meet current demand levels, but there is no capacity for large scale developments to attract larger occupiers to the Borough.
- 9.44 Barnet is not presently a strategic office location, the majority of stock is second hand and no major deals have been achieved in recent years. The current stock is designed to serve a particular locality and does not attract large scale developments to serve a wider area. This is primarily due to the historical nature of North London as an industrial and warehousing location which has resulted in an overall lack of high quality office supply.
- 9.45 In the future it appears that Barnet will become an increasingly significant office location within North London. This is supported by the growth agenda, promoted through the North London DIF, and demonstrated through the projection of the increasing presence of the Financial and Business Services sector. The projected increase in this sector's presence will in turn increase demand for office space within the Borough.
- 9.46 In order for Barnet to meet increased demand, new office space is required which needs to be of a high specification and offer a mix of small and large accommodation. This space is most likely to come forward in new build schemes, such as Brent Cross/Cricklewood or in new business parks across the Borough. We do recommend that an Employment Land Review for the Borough sets out future policy for specific employment sites in terms of retention and potential for redevelopment. To be successful it is important that these parks are set in the right location, with good transport links and comprising suitable stock. It is our view that western parts of the Borough where the M1, the A5 and the North Circular are easily accessible are the most viable locations for such development. This supports the major role Brent Cross/Cricklewood will play in the future provision of office space within Barnet. The proposed development here is likely to appeal to large businesses servicing a much wider area than those businesses currently located in the Borough. There is also potential for Barnet to capitalise on firms wishing to move to North London and overcome the existing trend for such firms to relocate to Hertfordshire and areas outside of the M25 due to present stock restrictions in the Borough.

10. QUANTITATIVE ASSESSMENT: BASELINE

- 10.1 In this section, we estimate the current performance of the retail provision in the London Borough of Barnet. This is then used as a basis for forecasting the capacity for additional retail floorspace for the period to 2026. The capacity tables accompanying this assessment are attached in Appendices 3 and 4.
- 10.2 We have used a conventional and widely accepted step-by-step methodology, consistent with best practice, this draws on the results of the household telephone survey of existing shopping patterns to model the flows of available expenditure to different retail destinations. To develop the baseline position, we have:
- calculated the total amount of convenience and comparison goods expenditure which is available within the post code areas comprising the Barnet survey area;
 - allocated the available expenditure to the convenience and comparison goods shopping destination, on the basis of the household telephone survey of shopping patterns, so as to provide estimates of current sales and forecasts of future sales;
 - compared the total expenditure attracted to each shopping destination with current retail floorspace to access sales density in each shopping destination.
- 10.3 Building on the baseline position, we have explored the global capacity for further convenience and comparison goods retail floorspace within the Borough. This takes into account development commitments in the pipeline and therefore provides our best estimate of the current position. In the next section we take this a stage further and test a series of scenarios for future growth and development. Scenario testing is encouraged through current best practice to allow local authorities to plan positively in response to change economic circumstances over forthcoming LDF periods.

Data Inputs

(i) Survey Area and Household Telephone Survey

- 10.4 In order to provide detailed factual baseline information on shopping patterns in the Borough, we have commissioned a new household telephone survey covering 1,575 households. GVA Grimley designed the survey questionnaire in consultation with Council Officers and NEMS, who undertook the interviewing and data processing. The survey area is illustrated on Plan 2.
- 10.5 The survey results identify shopping habits of households for both convenience and comparison goods. Where necessary, survey results have been re-based to remove certain responses such as 'internet/mail order shopping', to ensure consistency with categories excluded in the
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expenditure projections. For convenience goods, the household telephone survey included questions on main food and top-up food shopping. The results for the two types of food expenditure were then merged through the application of a weight, which reflects the estimated proportion of expenditure accounted for by each type. For food we use a 75%/25% main food top-up food weighting which is widely accepted and used in retail planning studies. This forms a composite pattern of convenience spending, expressed as a market share for each destination centre or food store, for each survey zone.

10.6 The survey also includes six questions on specific comparison goods type, which coincide with Experian Business Strategies definitions of comparison goods expenditure. The retail capacity modelling exercise uses the weighted averages of the household survey responses to each goods type based on the proportion of per capita expenditure on that goods type. This process establishes the pattern of spending for residents of each zone in terms of the following types of goods:

- clothes and shoes;
- furniture, floor coverings and household textiles;
- diy and decorating goods;
- domestic electrical appliances;
- tv, hi-fi, radio, etc; and
- personal, luxury goods and recreational goods.

10.7 Summary tables highlighting the survey results for each comparison goods type for Brent Cross, Edgware and the district centres is provided in **Appendix 2f**. The full results are included as **Appendix 8**.

(ii) Internet Sales/E-Tailing

10.8 For the purposes of quantitative capacity forecasting, we have deducted special forms of trading 'SFT', which includes mail order and internet based sales from expenditure per capita figures for convenience and comparison goods. We consider that the proportion of expenditure accounted for by SFT will increase over the period 2008-2026, based on Experian Business Strategies research into internet sales. For convenience goods, they forecast a rise in this sector from 3.4% in 2006 to 8.1% by 2016, remaining at this level until 2026 (Table 2, **Appendix 3**) and for comparison goods they forecast a rise from 8.3% in 2006 to 13.9% by 2016, remaining at this level until 2026 (Table 2, **Appendix 4**).

(iii) Estimates Population in the Survey Area

- 10.9 To establish the baseline at 2008, population estimates were prepared for each survey zone from the Experian E-Marketer system. This provides estimates of population based on trend line projections and the 2001 census for small, localised areas.
- 10.10 The population projections for the survey zones in the London Borough of Barnet were then taken from the Councils and the GLA's forecasts. These set out population projections for each of the wards in the Borough. We have translated the wards into the survey zones used in the retail study and then estimated the population in each of the test years for each survey zone. As the survey zones and ward boundaries do not directly correspond we have used growth rates rather than the actual numbers. The growth rates were applied to the Experian baseline position at 2011, 2016, 2021 and 2026.
- 10.11 Population of the survey area is currently 685,298. This forecast will grow to 744,982 by 2016, 759,612 by 2021 and 770,032 by 2026 (Table 1, **Appendix 3**). Overall the population is forecast to grow by 12% between 2008 and 2026 across the entire survey area.

(iv) Available Expenditure in the Survey Area

- 10.12 The Experian e-marketer system provides estimates for the per capita expenditure for convenience and comparison goods in 2006 prices. As outlined above, we have made deductions for special forms of trading. We have provided individual per capita expenditure figures across each survey area zone to provide a more detailed understanding of expenditure in different parts of the catchment area.
- 10.13 In terms of expenditure growth, we have drawn on convenience and comparison goods growth rates provided by Experian Business Strategies. These indicate that more growth would take place on comparison goods as apposed to convenience goods. This is because the scope to purchase more food is more limited than the scope to purchase non food goods. Experian Business Strategies estimate a convenience goods growth rate of 0.3% per annum and a comparison goods growth rate of 3.7% per annum. We have generated expenditure by zone to highlight variations across the survey area (Table 2, **Appendix 3**).
- 10.14 Table 3, **Appendix 3** applies per capita convenience goods expenditure within each zone to population forecasts. This shows that the total convenience goods expenditure within the survey area is currently £1,128m. This is forecast to grow to £1,218m by 2016, £1,261m by 2021 and £1,295m by 2026. This represents an overall growth of approximately £167m (15% between 2008 and 2026).
- 10.15 In terms of comparison goods, the total available expenditure within the survey area is currently £2,082m, and is forecast to increase to £2,914m by 2016, £3,564m by 2021 and £4,322m by 2026. This equates to an overall increase of £2,239m (107% between 2008 and 2026) (Table 3, **Appendix 4**).
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(v) Floorspace Data

- 10.16 The comparison and convenience floorspace data used in our modelling has been drawn from a range of data sources including the Institute of Grocery Distribution (IGD), London Borough of Barnet, the Trevor Woods Retail Warehouse Database and Experian Goad. Our floorspace assumptions for the foodstores include, where appropriate, an adjustment to identify the proportion of purely convenience goods floorspace. Most superstores include a proportion of non food floorspace; and we have therefore adjusted net floorspace to identify the proportion of sales space allocated for convenience goods. This accords with the expenditure data and the expenditure assumptions used.

Convenience Goods Assessment

- 10.17 Addressing each of the main town centres and out of centres destinations in the London Borough of Barnet, we have reviewed shopping patterns and performance of existing convenience goods floorspace. Using the composite market shares derived from the household telephone survey and baseline expenditure estimates, we have calculated the convenience goods turnover of the main convenience provision in the Borough.
- 10.18 The following analysis reviews the performance of the main convenience provision identified by the results of the household telephone survey, by comparing each with sales based upon estimates of company average, in accordance with PPS6. The survey results can underestimate the turnover of single stores on the basis that they may not be the regular destination for main food shopping but instead receive a large number of shoppers who visit infrequently and this would not be identified by the survey. M&S and Waitrose in particular, tend to be understated.

Table 10.1: Current Trading Performance of Convenience Floorspace London Borough Barnet

Foodstore	2008 Turnover (£000s)	Company Average Sales (£000s)
Waitrose	£21,460	£22,297
Marks and Spencer Food Hall	£4,578	£9,086
Total Brent Cross RSC	£26,038	£31,383
Sainsburys, Broadwalk Centre	£39,249	£31,183
Marks and Spencer Food Hall	£3,634	£19,411
Other Stores	£14,888	£7,660
Total Edgware Major Centre	£57,772	£58,254
Brent Street	£11,050	£10,807
Chipping Barnet	£21,423	£20,688
Finchley Church End	£29,506	£41,381
East Finchley	£4,169	£4,460
Mill Hill	£2,392	£11,396
Colindale - The Hyde	£1,356	£1,847
Temple Fortune	£16,459	£34,210
Burnt Oak	£12,249	£18,949
Cricklewood	£4,095	£12,406
North Finchley	£34,514	£24,235
New Barnet	£44,349	£26,343
Whetstone	£18,999	£18,321
Hendon Central	£824	£2,652
Golders Green	£30,983	£18,026
Local Centres	£6,567	£1,911
Total District and Local Centres	£238,935	£245,719
Marks and Spencer Whetstone	£1,792	£9,865
Sainsburys The Hyde	£28,942	£30,746
Tesco, Brent Cross South	£16,770	£35,597
Tesco, Colney Hatch Lane	£65,760	£38,772
Tesco Express, East Barnet Ln	£8,445	£3,004
Waitrose, North Finchley	£37,935	£29,188
Waitrose Mill Hill East	£21,869	£19,548
Total Out of Centre	£181,513	£173,222
TOTAL	£504,258	£508,577

Source: GVA Convenience Capacity Modelling, Appendix 3.

(i) Brent Cross Regional Shopping Centre

- 10.19 In total, we estimate that the convenience stores in Brent Cross regional shopping centre have a turnover of £26.0m. If all the stores traded at company average levels, the turnover would be £31.4m. Our analysis indicates that the Waitrose store is trading adequately; it draws some trade from most survey zones in the southern part of the Borough. According to the household telephone survey, the Marks & Spencer Food Hall is performing less well in relation to company average turnover. However, this is likely to be due to the nature of the survey questions which focus on main food shopping and this store is likely to largely be a top-up food shopping destination.

(ii) Edgware Major Centre

- 10.20 We estimate that the convenience stores in Edgware major centre have a combined turnover of £57.8m, which is in line with turnover at company average levels (£58.2). The Sainsbury's store in the Broadwalk Centre is trading very well and has a turnover of £39m compared with a company average turnover of £31.2m. Conversely, the Marks & Spencer Food Hall in the Broadwalk Centre appears to be trading at significantly below company average levels. Again this may in part be due to the household telephone interview survey focusing on main food shopping. It is evident however that the other convenience stores in Edgware, which are likely be largely used for top-up food shopping are trading extremely well and have a turnover of approximately £14.9m compared with an average turnover of £7.7m. Edgware draws the majority of its convenience goods trade from survey zone 8 (29%). It also draws some trade from adjacent zones 4, 9 and 14; 5%, 8% and 12% respectively.

(iii) District Centres

- 10.21 **Brent Street District Centre** has a turnover of £11.05m compared with our estimate of company average turnover at £10.8m. The Tesco store at Sentinel Square in Brent Street is performing adequately (£10.7m) and at slightly above company average levels (£8.7m), whereas the performance of other stores does not appear as strong.
- 10.22 **Chipping Barnet District Centre** has a turnover of £21.4m which is broadly in line with company average turnover levels (£20.7m). The Waitrose store in The Spires Shopping Centre is performing adequately with an estimated turnover of £17.1m compared with an average turnover of £17.5m. The range of other convenience stores in Chipping Barnet are trading at broadly average levels.
- 10.23 **Finchley Church End District Centre** has an estimated turnover of £29.5m which is below estimates based upon company average sales (£41.4m) and would indicate that the centre is not performing as strongly as possible. We estimate that the turnover of the Tesco Metro in Finchley Church End is below the level based upon estimates of company average. It has a turnover of £29.3m compared with the company average of £38m. However, our qualitative analysis found

the store busy and likely to be trading well at the time of our site visit in October 2008 and the survey may have underestimated the store's performance. The range of other convenience stores in Finchley Church End, which are largely operated by independent retailers, have a very limited turnover of £0.2m compared with the potential turnover of £3.4m based on an average £1,500 per sqm sales density.

- 10.24 **East Finchley District Centre** has a turnover of £4.2m, this is broadly in line with estimates of average turnover at £4.5m. East Finchley does not have a main convenience store operated by one of the core foodstore retailers rather it has a Budgens convenience store, supplemented by an Iceland and Spar, and this is reflected in the lower level of turnover.
- 10.25 **Mill Hill East District Centre** has a turnover of approximately £2.4m. This is significantly below turnover based upon company averages at £11.4m. The main convenience store in Mill Hill District Centre is a Marks & Spencer Simply Food, based upon company averages this stores should have a turnover of approximately £9.9m. From our qualitative assessment we acknowledge that the store is positioned at the far end of the main high street away from the main focus but considered well-located opposite the bus and rail station to meet the top-up needs of commuters. The indication that the store is under-trading may therefore be a reflection of the survey focusing on main food rather than top-up food shopping.
- 10.26 However, it could also be an indication that the Marks & Spencer store does not meet shopper's needs in the Mill Hill area. Our analysis shows that shoppers from the Mill Hill zone, zone 4, are using a range of alternative convenience stores including out of centre Waitrose stores at North Finchley (10%) and Mill Hill East (20%), Sainsburys Edgware (5%), Tesco Brent Street (5%), Tesco Finchley Church End (16%), Sainsburys North Finchley (5%).
- 10.27 **Colindale - The Hyde District Centre** has a turnover of £1.4m. This compares with a company average of £1.8m and indicates that Colindale - The Hyde is performing at broadly average levels. Colindale - The Hyde does not have a convenience store operated by a national multiple and as highlighted in our qualitative assessment, the centre has overall limited convenience provision. This is reflected in the lower level of convenience goods turnover of the centre.
- 10.28 **Temple Fortune District Centre** has a turnover of £16.4m. This is significantly below the estimated turnover based upon company average sales which is £34.2m. All of the stores in Temple Fortune are trading at below average levels. We estimate that the Waitrose store has a turnover of £11.6m compared with the company average of £21.8m. The other convenience stores in Temple Fortune, including a Marks & Spencer Simply Food have a combined turnover of £4.8m compared with a company average of £12.4m. The low Waitrose turnover maybe a reflection of the relatively dated nature of the store which is quite small with a cramped, poorly configured layout. The lower level of turnover identified for Marks and Spencer Simply Food and the other convenience stores is likely to be a reflection of the survey focus on main food rather than top-up shopping. Although the Marks and Spencer store was not busy at the time of our site visits.

- 10.29 **Burnt Oak District Centre** has a turnover of £12.2m compared with a company average of £18.9m. The convenience stores are therefore trading at below company average levels and this is a result of a poor performance by both the Tesco store and the other local convenience stores including food stalls at the local market. We estimate that Tesco has a turnover of £7m compared with a company average turnover of £13.4m. The low turnover of the Tesco Metro store in Burnt Oak is likely to be as a result of its top-up shopping function and its more dated appearance. There is also quite considerable competition from other independent retailers in Burnt Oak. Tesco have been investigating other development opportunities in Burnt Oak, as outlined in Section 12. The other convenience stores have a turnover of £5.2m which is broadly in line with our estimate of average turnover (£5.6m).
- 10.30 **Cricklewood District Centre** has a turnover of £4.1m this is significantly below estimates based on company average which indicate a turnover of £12.4m. The Somerfield store and the other convenience stores draw a very limited amount of trade, despite a sizeable other convenience store provision. Cricklewood only has a 2% market share from zones 11 and 15.
- 10.31 **North Finchley District Centre** has a convenience goods turnover of £34.5m. This is one of the highest levels of turnover of the district centres in Barnet. It compares to a company average turnover of £24.2m and indicates that the centre is performing well for convenience goods trade. The strong performance of North Finchley is largely as a result of the Sainsbury's store which has an estimated turnover of £34.1m compared with company average turnover of £22.3m. North Finchley appears to draw some trade from the majority of survey zones. Most trade (20%) is drawn from survey zone 3 where it is located but it also draws some trade, albeit lower amounts, from 10 other survey zones.
- 10.32 **New Barnet District Centre** has a turnover of £44.3m this is an extremely high level of trade and is the highest convenience goods turnover of all district centres. We estimate that the Sainsbury's store in New Barnet has a turnover of £38m this compares to a turnover based upon estimates of company average of £25.9m. The store is therefore trading extremely strongly. The household telephone survey indicates shoppers are also attracted to New Barnet for other convenience goods stores. This is however a survey anomaly as there are very few other convenience stores in New Barnet. It is possible that respondents confused the distinction between New Barnet and nearby East Barnet town centres which does offer a range of convenience stores. New Barnet draws the majority of its trade from survey zones 1 and 2. It has very strong market shares in these zones for a district centre, 28% in zone 1 and 34% in zone 2.
- 10.33 **Whetstone District Centre** has a turnover of £19m, compared with an average turnover of £18.3m. The centre is therefore performing adequately, the household telephone survey indicates that the Waitrose in Whetstone is performing below company average levels, it has a turnover of £13.3m compared with a company average of £17.3m. The other convenience stores in Whetstone appear to be performing really strongly with a turnover of £5.7m compared with an estimated average of £0.97m. Whilst the survey may not adequately reflect the role of different stores in Whetstone, the Waitrose store is quite small and dated, with an under stated street frontage. Whetstone attracts most of its trade from survey zones 2 and 3. It is located on the
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border of these two survey zones. Much of the trade to other convenience stores in Whetstone is from survey zones 8 and 9 which are some distance from the district centre. There are a number of office buildings in the centre and it is therefore possible that this trade can be attributed to those working in the centre, purchasing their lunch and other top-up shopping before travelling home.

- 10.34 **Hendon Central District Centre** has a very low level of turnover at £0.8m. This is the lowest level of all the district centres in the Borough and compares with an average turnover of £2.6m. According to the household telephone survey Hendon Central draws just 1% of trade from survey zone 10, where it is located. The poor performance of Hendon Central may reflect the lack of a main food shopping convenience store in the centre, the provision is mainly from smaller top-up shopping convenience store operators such as Costcutter, Nisa and Premier Express.
- 10.35 **Golders Green District Centre** has a turnover of £31m which is considerably above the turnover based upon company average at £18m. The Sainsbury's store in Golders Green is performing particularly well with an estimated turnover of £23.7m compared with company average turnover of £12.3m. The Tesco Express store is also performing well and the other stores in Golders Green adequately.

(iv) Local Centres

- 10.36 The local centres in the London Borough of Barnet have a combined turnover of £6.6 m this is a good level of turnover when compared with an estimated average of £1.9m. It indicates that the local centres are performing well and largely meeting their role in the local shopping hierarchy.

(v) Out of Centre Convenience Stores

- 10.37 The household telephone survey has identified the use of seven out of centre foodstores in the London Borough of Barnet which collectively have a turnover of £181.5m, compared with a company average turnover of £166.7m. The survey has not identified much trade drawn to the Marks & Spencer Simply Food store in Whetstone. It has an estimated turnover of £1.8m compared to a company average of £9.9m. The Sainsbury's store at The Hyde is performing broadly in line with company average with a turnover of £28.9m compared to the company average of £30.7m.
- 10.38 According to the survey the Tesco store at Tilling Road appears to be undertrading with an estimated turnover of £16.8m compared to a company average of £35.6m. Whilst we find it surprising for a Tesco to be trading so poorly, it was evident from our site visit that the complexity of the adjacent road network creates some accessibility issues for vehicles and limits the potential for any walk-in catchment. The survey also suggests the centre performs only a very limited role in terms of top-up food shopping.
- 10.39 The remainder of the out of centre stores are performing strongly, in particular the Tesco store Colney Hatch Lane has a turnover of £65.8m compared to a company average of £38.8m. This is

a very strong level of performance. The Tesco Express store on East Barnet Lane is also performing very well with a turnover of £8.4m compared to a company average of £3m. Both the Waitrose stores at North Finchley and Mill Hill East are performing well. The Waitrose North Finchley has a turnover of £38m compared to a company average of £29.2m and the Waitrose Mill Hill East has a turnover of £22m compared to a company average turnover of £19.5m.

Baseline Convenience Goods Capacity Forecasts

- 10.40 We have examined the capacity for further convenience goods floorspace at the global level for the London Borough of Barnet up to 2026 (incorporating the interim years of 2011, 2016 and 2021). It is important to note that capacity forecasts become increasingly open to margins of error over time and should be updated over the LDF period.
- 10.41 The forecasts for global capacity will enable the Borough to test alternative options for the spatial distribution of new development. By forecasting at the Borough level, the Council can make informed policy choices about where the capacity should be met depending on a range of other considerations such as site availability and accessibility. Capacity arising in a specific centre does not necessarily mean that the identified capacity should be met within that centre. A more appropriately located site in a nearby centre may encourage, for example, more sustainable travel patterns.
- 10.42 In order to ensure our capacity forecasts are as up to date and robust as possible we have taken into account new convenience goods developments already coming forward in the future as a result of existing planning permissions. In terms of the convenience commitments we have considered, they include the following schemes provided by the Borough council:
- Extension to Tesco, Colney Hatch Lane/North Circular (*complete*)
 - Sainsbury's Extension, 612-614 Finchley Road (Golders Green)
 - Former Courts Unit, Staples Corner Retail Park, Edgware Road (*under construction*)
 - Grahame Park Estate
 - Unit 1C, Brent Cross Shopping Centre
- 10.43 These convenience goods retail commitments have a combined convenience goods floorspace of 1,628 sqm net. We have converted this into an expected turnover for this floorspace. This is then removed from the residual expenditure identified in the capacity modelling.
- 10.44 In order to translate residual convenience goods expenditure into floorspace, we have assumed that mainstream foodstore operators would aim to achieve an average sales density of approximately £10,000 per sqm net. As is our normal practice, we have not prepared low and high sales density capacity forecasts, rather we have focused on the capacity available to support main foodstores. The forecasts are therefore conservative; if smaller operators and discounters
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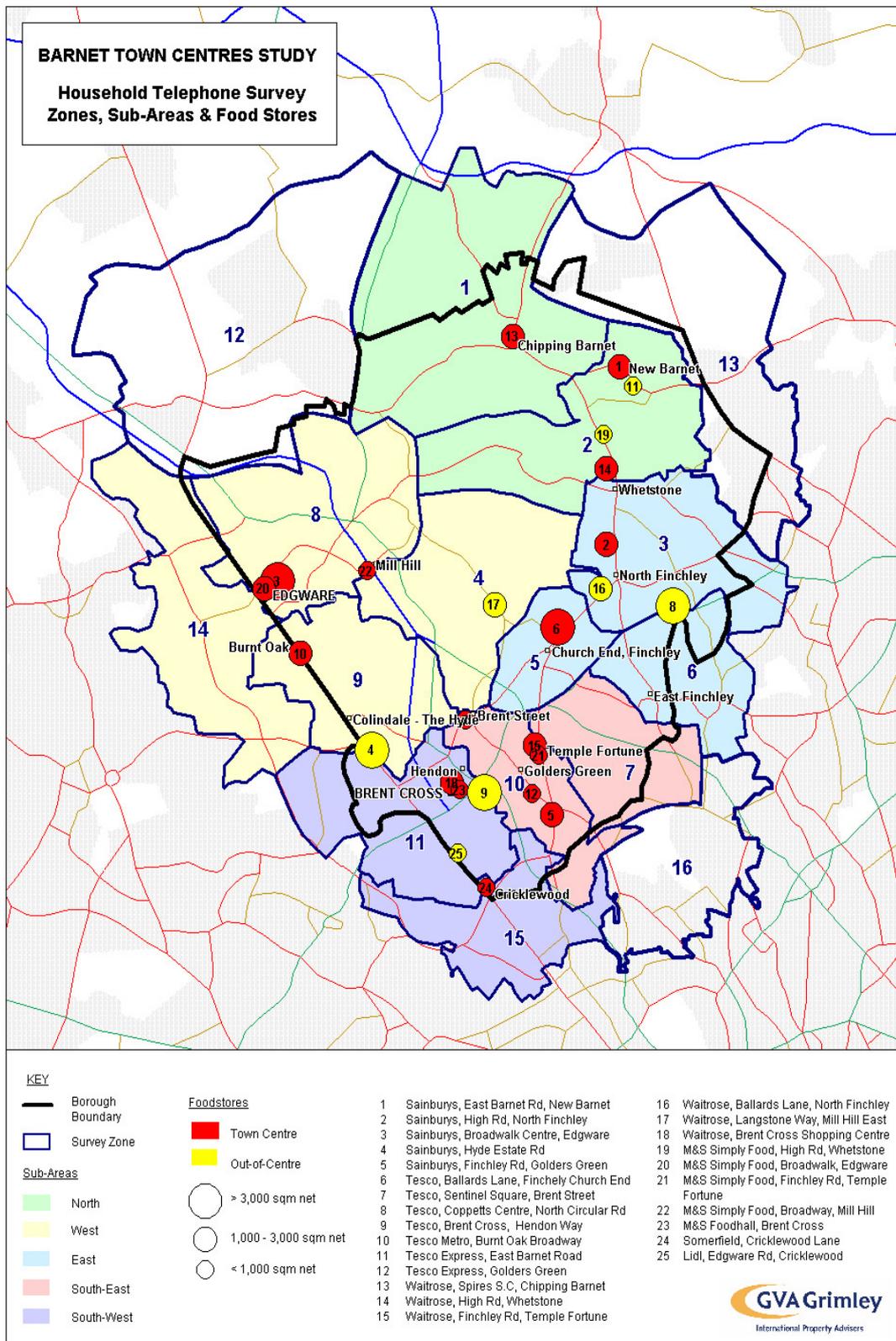
come forward the amount of capacity available would be greater as they have a lower sales density. For example Budgens currently have a sales density of £3,342 per sqm net and Aldi £3,638 per sqm net.

- 10.45 Table 10.2 illustrates the global convenience goods capacity in the London Borough of Barnet. These figures are based on current market shares and taken account of the commitments outlined above. It is evident that a limited amount of convenience goods floorspace capacity is created in the Borough in the short-term. We forecast that by 2011 there will be limited capacity to support 103 sqm net convenience goods floorspace. By 2016, capacity arises to support of 3,233 sqm net, increasing to 5,028 sqm net by 2021.
- 10.46 We have forecast the capacity in different sub-areas of the Borough. The majority of capacity arises in the East, largely as a result of the strong performance of Sainsbury's North Finchley and Tesco Colney Hatch Lane. Some capacity also arises in the North (Chipping Barnet and New Barnet) and in the West (Edgware) by 2021.

Table 10.2: Baseline Capacity Forecasts for Convenience Goods (sqm net)

	2011	2016	2021
Borough	103	3,233	5,028
North	1,653	1,884	2,071
West	-1,008	543	1,091
East	3,352	3,955	4,476
South East	-505	-351	-57
South West	-3,389	-2,798	-2,553

Source: GVA Convenience Capacity Modelling, Appendix 3.



Map reproduced from GBPro 200 GB (2005 edition). © Collins Bartholomew Ltd (2005)

Comparison Goods Assessment

10.47 We have assessed each of the main comparison goods shopping destinations in the Borough by reviewing shopping patterns and the performance of existing comparison goods floorspace. Using the market shares derived from the household telephone survey and the baseline expenditure estimates, we have calculated the comparison goods turnover of each of the main centres, including Brent Cross regional shopping centre, Edgware major centre, all the district centres and the out of centre stores. (Table 10.3)

Table 10.3: Current Trading Performance of Comparison Floorspace London Borough Barnet

Location	2008 Turnover (£000s)	Floorspace (sqm net)	Sales Density (£per sqm)
Brent Cross	699,854	62,646	11,172
Edgware	48,360	13,200*	3,664
Brent Street	1,218	2,912	418
Chipping Barnet	21,081	9,601	2,196
Finchley Church End	4,053	4,557	889
East Finchley	11,416	3,062	3,728
Mill Hill	24,142	3,439	7,020
Colindale - The Hyde	5,472	2,807*	1,949
Temple Fortune	4,593	4,641	990
Burnt Oak	6,101	7,089*	861
Cricklewood	12,795	12,084*	1,059
North Finchley	66,096	6,819	9,693
New Barnet	6,397	1,842	3,473
Whetstone	7,724	2,327	3,319
Hendon Central	12,698	1,762	7,206
Golders Green	4,768	4,271	1,116
Out of Centre	138,025	50,593	3,249
TOTAL	1,074,793	158,472	

Source: GVA Comparison Capacity Modelling, Appendix 4. *includes floorspace outside Barnet

(i) Brent Cross Regional Shopping Centre

10.48 We have used the household telephone interview survey to estimate the market share at Brent Cross regional shopping centre (Table 4, **Appendix 4**). We have also included the survey results for Brent Cross South Shopping Park as we consider that shoppers are likely to regard this and Brent Cross regional shopping centre as a single destination in their responses to the household telephone survey.

10.49 Brent Cross draws some trade from all the zones in the survey area. The core catchment of Brent Cross covers five survey zones surrounding the centre and the area to the east. This includes survey zones 4, 5, 7, 10 and 11. In this area Brent Cross attracts 40-46% of comparison goods shopping. In its secondary catchment area, Brent Cross has a market share of between 16-33% this includes all of the remaining survey zones with the exception of zone 12 which covers the Borehamwood area.

- 10.50 The location of Brent Cross on the south western edge of the Borough of Barnet and subsequently our survey area has meant that we have not identified the entire catchment area of the centre. It is likely to draw trade from the western parts of London beyond the survey area. We have not at this stage carried out an in centre survey which would enable the identification of people using Brent Cross from beyond our telephone survey area. We have therefore estimated the likely inflow of trade to Brent Cross from beyond our survey area and we consider this could be in the region of 20%.
- 10.51 Based on these shopping patterns, we estimate Brent Cross has comparison goods turnover from the survey area of £559.9m (Table 5, **Appendix 4**). With an inflow of 20% from beyond the survey area this equates to a total centre comparison turnover of £699.9m. We estimate that the existing comparison goods floorspace of Brent Cross shopping centre is currently 62,646 sqm net and based upon the level of turnover identified it therefore has a sales density of £11,172 per sqm net. This is a strong performance.
- 10.52 The turnover of Brent Cross shopping centre is forecast to increase over the period to 2021 as a result of growth in population and expenditure, this increasing turnover is on the basis of an assumed constant market share. The opening of Westfield since the survey was undertaken is likely to have had some impact on Brent Cross' overall market share however, the redevelopment of the Brent Cross area will result in an enhanced market share which will increase the turnover of the centre further in the future. However, for the purposes of our baseline forecasts we estimate that the turnover at Brent Cross could increase to £785.4m by 2011, £994.8m by 2016 and £1,218.3m by 2021.

(ii) Edgware Major Centre

- 10.53 We have identified the main market share attracted to Edgware is from survey zones 8, 9 and 14. Edgware is located on the border of these three zones. The highest market share is from zone 8 at 14%, followed by zone 9 at 10% and zone 14 at 7%. Overall the level of market share attracted to Edgware results in a comparison goods turnover for the centre of £48.4m. This is forecast to increase to £55.1m by 2011, £70m by 2016 and £85.4m by 2021. We estimate that Edgware has a total comparison goods floorspace (including parts outside the London Borough of Barnet) of 13,200 sqm net. Based upon a turnover of £48.4m this equates to a sales density of £3,664 per sqm net. This is an adequate level of trading but does not demonstrate a particularly strong centre. North Finchley, a district centre has a higher level of turnover than Edgware and a number of district centres have a higher sales density reflecting a better performance.

(iii) District Centres

- 10.54 **Brent Street District Centre** has a turnover of £1.2m. This is a low level of trading and Brent Street only attracts a limited market share for comparison goods shopping from the survey area. We estimate that the turnover of Brent Street equates to a performance or sales density of below £500 per sqm net. This is a poor performance for comparison goods shopping and reflects the more localised shopping facilities that are on offer.
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- 10.55 **Chipping Barnet District Centre** has a turnover of £21.1m for comparison goods. This equates to a sales density of £2,196 per sqm on the basis of a comparison goods floorspace of 9,601 sqm net. This is an adequate level of trading but is not as strong as some of the other District Centres in the Borough. We have adjusted the survey results for Chipping Barnet and New Barnet as we consider that respondents may have confused the two. The survey results for Chipping Barnet indicated a low market share for comparison goods whereas the results for New Barnet indicated a high market share which does not accord with the retail offer available in New Barnet. It has a very limited comparison goods offer and is dominated by service outlets.
- 10.56 **Finchley Church End District Centre** has a turnover of £4m with a floorspace of 4,557 sqm net this equates to sales density of under £1,000 per sqm net. This is a low level of trading for this district centre and reflects a poor performance. The centre attracts just 1.3% of comparison goods trade from survey zone 5 where it is located and a very negligible proportion of trade from other survey zones.
- 10.57 **East Finchley District Centre** has an estimated turnover of £11.4m. This trade is largely drawn from survey zones 5, 6, 7, 15 and 16. Most trade is drawn from survey zone 6 where East Finchley is located (2.6%). We estimate that East Finchley has a comparison goods floorspace of 3,062 sqm net and based upon a turnover of £11.4m this equates to a sales density of £3,728 per sqm net. This is a good performance represented by a strong sales density.
- 10.58 **Mill Hill District Centre** has an estimated comparison goods turnover of £24.1m. Mill Hill draws trade from a number of different survey zones including in particular survey zones 4, 8 and 9. Aside from these zones it draws trade from all other survey zones with the exception of three which is a strong performance. With an estimated comparison goods floorspace 3,439 sqm net and a turnover of £24.1m we estimate that Mill Hill has a sales density of £7,020 per sqm net. This is a very strong level of trading and may reflect the boutique and designer fashion comparison shopping offer in Mill Hill.
- 10.59 **Colindale - The Hyde District Centre** has an estimated comparison goods turnover of £5.5m. With a floorspace of 2,807 sqm net this equates to a sales density of £1,949 per sqm net. This is an adequate level of performance and reflects the more limited comparison goods offer in Colindale - The Hyde.
- 10.60 **Temple Fortune District Centre** has an estimated turnover of £4.6m. This trade is drawn from survey zones 10 and 7. Temple Fortune has an estimated comparison goods floorspace of 4,641 sqm net and this equates to a sales density of just under £1,000 per sqm net. This is not a particularly strong level of trading and we would expect Temple Fortune to be trading at a higher level given the number of high quality and specialist boutique operators.
- 10.61 **Burnt Oak District Centre** has a comparison goods turnover of £6.1m, the majority of which is drawn from survey zone 9 (2.9%). With a floorspace of 7,089 sqm net this equates to a sales density in Burnt Oak of under £1,000 per sqm net. This is not a particularly strong level of trading but reflects the lower order comparison goods order in Burnt Oak.
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- 10.62 **Cricklewood District Centre** has an estimated turnover of £12.8m. The centre comprises 12,084 sqm net of comparison goods floorspace which equates to a sales density for comparison goods of £1,059 per sqm net. This is considered a moderate level of performance for this district centre.
- 10.63 **North Finchley District Centre** has a turnover of £66.1m. This is a very strong level of trading and is the highest of all the district and major centres in the Borough. North Finchley attracts trade from all the survey zones with the exception of one, the most trade is attracted from survey zone 3 where it is located (14.8%) and the adjacent survey zone 5 (12.2%). With a turnover of £66.1 m and a floorspace of 6,819 sqm net this equates to a sales density of £9,693 per sqm net. This is a very strong performance and reflects that comparison goods facilities in North Finchley are trading extremely well.
- 10.64 **New Barnet District Centre** has an estimated turnover of £6.4m. It has a limited comparison goods offer and just 1,842 sqm net of floorspace, including the non-food goods in the Sainsbury's store. With this level of floorspace, we estimate that New Barnet has a sales density of £3,473 per sqm net which is good performance.
- 10.65 **Whetstone District Centre** has a comparison goods turnover of £7.7m. Most trade is drawn from survey zones 1, 2 and 3. With a floorspace for comparison goods of 2,327 sqm net Whetstone has a sales density of £3,319 per sqm net. This is a good level of trading.
- 10.66 **Hendon Central District Centre** has a turnover of £12.7m. The majority of this trade is drawn from survey zone 11 where it is located. Hendon Central only has a modest comparison goods floorspace, which is the lowest of all the district centres in Barnet, at 1,762 sqm net. With this quantum of floorspace and a turnover of £12.7m this equates to sales density of £7,206 which is such a strong performance for this centre we consider there must be a survey anomaly.
- 10.67 **Golders Green District Centre** has a comparison goods turnover of £4.8m. This trade is largely drawn from survey zone 10 (2.1%) where the district centre is located. With a comparison goods floorspace of 4,271 sqm net this equates to a sales density in Golders Green of £1,116 per sqm net, this is a moderate level of performance for this district centre.

(iv) Out of Centre

- 10.68 We have identified the market share drawn to the main retail warehouse destinations in the Borough, as well as stand alone units. The retail warehousing stores attract trade from all the survey zones albeit not more than 10% from any one zone. The majority of trade is attracted to retail parks in survey zone 3 (8.2%) this is where Friern Bridge retail park is located.
- 10.69 Overall we estimate that the retail warehouses in the London Borough of Barnet have a combined comparison goods turnover of £138m. This compares with a turnover based upon company average sales of £165.5m. The stores are therefore trading at below average levels. According to the household telephone survey, all of the retail parks are under performing. We have
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identified a low level of turnover for Staples Corner Retail Park, Pentavia Retail Park and Broadway Retail Park. The stores that are performing well include the Homebase North Finchley and the B&Q Whetstone.

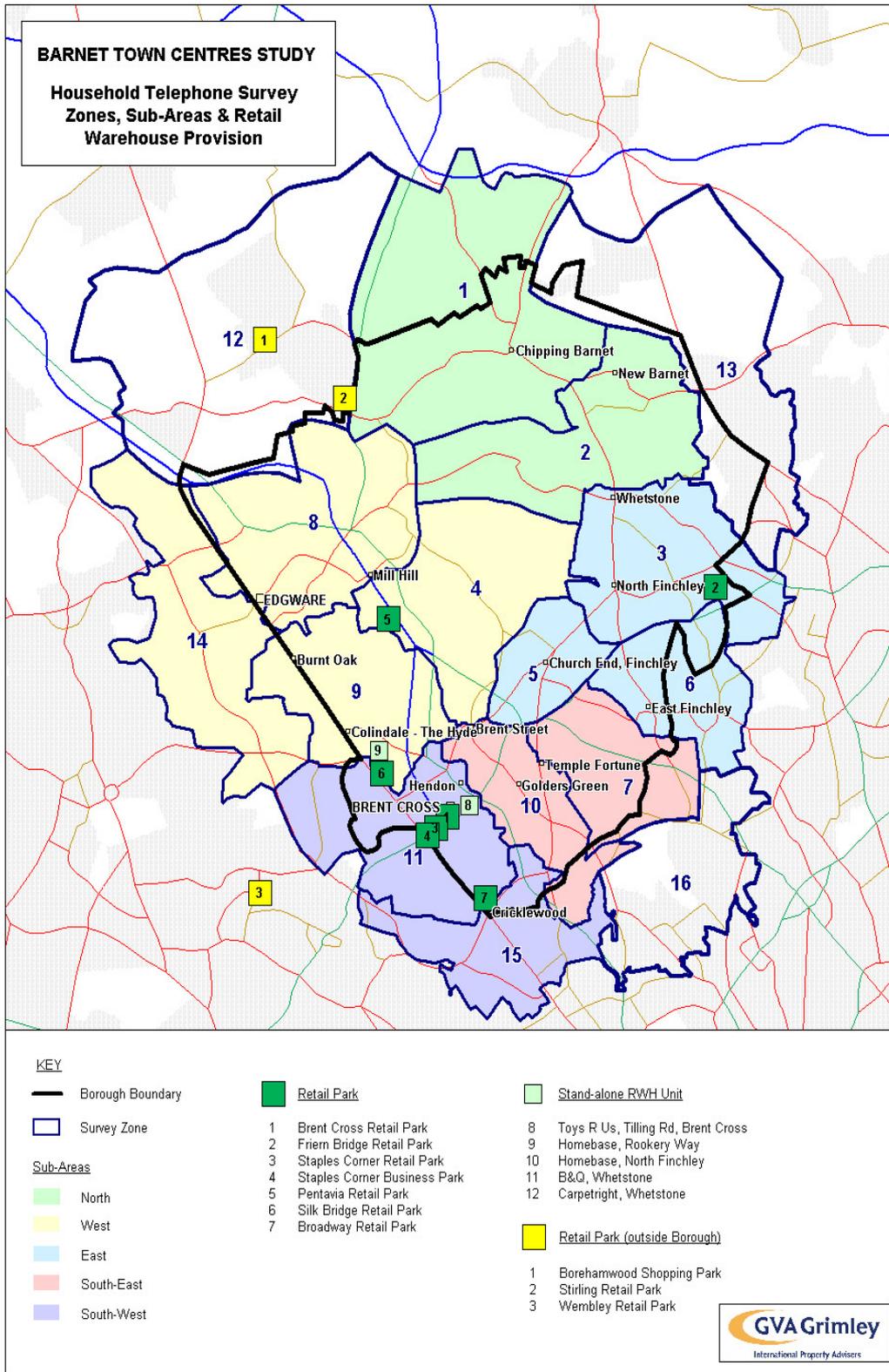
Baseline Comparison Goods Capacity Forecasts

- 10.70 In accessing capacity for future comparison goods floorspace, we have assumed that the efficiency with which existing floorspace is being used will increase over time, and we have assumed an annual growth in existing sales per sqm of 1.5%. Drawing on our experience elsewhere we have assumed new floorspace should achieve sales of at least £5,500 per sqm net.
- 10.71 We have factored in a number of commitments for comparison goods floorspace which will come forward in the future. These are on the whole very small scale and include the following:
- Sainsbury's, 612-614 Finchley Road, Golders Green
 - Former Courts Unit, Staples Corner Retail Park
 - Extension to Tesco, Colney Hatch/North Circular
 - Unit 1C, Brent Cross Shopping Centre
- 10.72 The combined floorspace of these commitments for comparison goods is 5,067 sqm net.
- 10.73 Table 10.4 below illustrates the global comparison goods capacity for the London Borough of Barnet. These figures are based on current market share and take account of commitments. It is evident that growth and population expenditure in the Borough create a large residual capacity by 2021. We estimate capacity for a further 11,356 sqm net by 2011, increasing to 47,917 sqm net by 2016 and 81,024 sqm net by 2021.
- 10.74 We have forecast the capacity available in the different sub-areas of the Borough. The vast majority of capacity arises in the South West (Brent Cross/Cricklewood). There is also some in more modest capacity in the East (North Finchley) and West (Edgware).

Table 10.4 Baseline Capacity Forecasts for Comparison Goods (sqm net)

	2011	2016	2021
Borough	11,356	47,917	81,024
North	273	1,015	1,753
West	1,947	6,538	10,116
East	913	5,058	9,607
South West	9,060	35,944	59,885
South East	-837	-637	-336

Source: GVA Comparison Capacity Modelling, Appendix 4



Map reproduced from GBPro 200 GB (2005 edition). © Colins Bartholomew Ltd (2005)

Summary

10.75 We have used our capacity modelling to assess the convenience and comparison goods turnover of the centres in Barnet. As illustrated on Table 10.5, Brent Cross is performing at a different level from all of the other centres, with a total turnover of £725.9m. The Major Centre of Edgware has a turnover of over £100m, as does North Finchley. The remaining District Centres have a turnover of between £12m and £50m.

Table 10.5 Centre Turnover (£000s)

	Convenience Goods Turnover (£000s)	Comparison Goods Turnover (£000s)	Total Turnover (£000s)
Brent Cross RSC	26,038	699,854	725,892
Edgware Major Centre	57,772	48,360	106,132
North Finchley	34,514	66,096	100,610
New Barnet	44,349	6,397	50,746
Chipping Barnet	21,423	21,081	42,504
Golders Green	30,983	4,768	35,751
Finchley Church End	29,506	4,053	33,559
Whetstone	18,999	7,724	26,723
Mill Hill	2,392	24,142	26,534
Temple Fortune	16,459	4,593	21,052
Burnt Oak	12,249	6,101	18,350
Cricklewood	4,095	12,795	17,070
East Finchley	4,169	11,416	15,585
Hendon Central	824	12,698	13,522
Brent Street	11,050	1,218	12,268
Colindale - The Hyde	1,356	5,472	6,828
Out of Centre	181,513	138,025	319,538

Source: GVA Convenience and Comparison Modelling

10.76 Our convenience goods assessment indicates a mixed performance by foodstores in Barnet. Some centres are performing really well, largely as a result of strong anchor convenience stores, for example, North Finchley, New Barnet and Golders Green. Others show a more average performance, for example Brent Cross, Edgware, Brent Street, Chipping Barnet, East Finchley, Colindale - The Hyde and Whetstone. Whereas some, according to the survey results are performing less well, for example, Finchley Church End, Mill Hill, Temple Fortune, Burnt Oak, Cricklewood, and Hendon Central.

10.77 The forecasts show limited convenience goods capacity in the Borough in the short term. By 2016 global capacity is forecast for 3,233 sqm net of convenience goods floorspace, increasing to 5,028 sqm net by 2021. Most of the convenience capacity is arising in the East (North Finchley) and North (Chipping Barnet and New Barnet) sub areas of the Borough. Some capacity also arises in the West (Edgware) sub-area beyond 2016.

- 10.78 Our assessment of comparison goods also shows a mixed performance. According to the survey certain centres such as Brent Cross, Mill Hill and North Finchley are trading very well, whereas others such as Brent Street, Burnt Oak, Finchley Church End and Cricklewood have a low level of trading. We also consider there are some anomalies such as Temple Fortune where we consider that the entire market share has not been identified and Hendon Central where the market share has been over stated. Overall the retail warehouses in Barnet are performing at below average levels. Certain retail parks are under performing including Staples Corner, Pentavia and Broadway Retail Parks.
- 10.79 For comparison goods on the basis of current market shares, increases in population and disposable income will increase the available comparison spend, creating capacity for additional retail floorspace. We forecast a comparison goods capacity of 11,356 sqm net by 2011, increasing to 47,917 sqm net by 2016 and 81,024 sqm net by 2021. This is a very significant amount of floorspace and in the next section we carry out scenario testing to examine the implications for capacity of different growth and development scenarios.

11. QUANTITATIVE ASSESSMENT: SCENARIO TESTING

11.1 In this section, we develop the baseline capacity assessment to test alternative future development scenarios. We have examined the implications for convenience and comparison goods floorspace capacity of development in the pipeline coming forward. This includes proposals for new foodstores in the Borough including two new convenience superstores in New Barnet. We have also examined the implications for capacity of the redevelopment of Brent Cross regional shopping centre into a town centre.

Convenience Goods Capacity Forecasts with Pipeline Development

11.2 The convenience goods capacity scenarios, examining the implications for capacity of developments in the pipeline coming forward, draw on estimates from GVA Grimley and information from Barnet Council. The development pipeline includes the following:

- Asda, New Barnet
- Tesco, New Barnet
- Tesco Express, New Barnet
- Replacement Tesco Extra and Unit shops, Brent Cross South
- Convenience store, Colindale Avenue
- Unit shops, Mill Hill East

11.3 Based on constant market shares, the baseline convenience goods capacity assessment indicates capacity for additional floorspace in the LB Barnet by 2016. In the short term, to 2011, there is a small negative global capacity or over supply of floorspace. We estimate capacity to support an additional 3,233 sqm net convenience goods floorspace by 2016, increasing to 5,028 sqm net by 2021. The scenario testing seeks to understand the effects of new development on capacity. On the basis of current convenience goods market shares there is clearly limited capacity to support new floorspace.

11.4 For the scenario testing we have sought to anticipate when development is likely to come forward. The timing of development affects the estimates of capacity as there will be more growth and expenditure to support new floorspace over a longer timescale. We have anticipated that pipeline development at New Barnet, Colindale Avenue and Mill Hill East could come forward

by 2011. We have assumed that the replacement Tesco Extra store and unit shops at Brent Cross South would not come forward until 2016.

11.5 On this basis we estimate that convenience goods development in the pipeline would remove any surplus capacity in the London Borough of Barnet over the LDF period and create a large surplus of floorspace. We anticipate an oversupply of floorspace would arise to the extent that there would be a surplus of -10,776 sqm net of convenience floorspace in 2011, -14,633 sqm net in 2016 and -13,108 sqm net in 2021.

11.6 We have examined the effects of pipeline development coming forward on the capacity in different sub areas of the Borough (Table 11.1) As indicated in the baseline work the majority of capacity arises in the East sub area, we have not identified any development in the pipeline which would address this capacity. However, this area is adjacent to the North sub area where two convenience superstores are potentially in the pipeline to come forward in New Barnet and a Tesco Express on Victoria Road, New Barnet.

Table 11.1: Barnet Scenario Testing of Convenience Goods Capacity (sqm net)

Scenario	2011 (sqm net)	2016 (sqm net)	2021 (sqm net)
Baseline	103	3,223	5,028
With all pipeline development	-10,776	-14,633	-13,108
With pipeline development but only one superstore at New Barnet*	-6,655	-10,450	-8,862
North	1,653	1,884	2,071
Scenario Two Superstores & Express	-8,343	-8,262	-8,229
Scenario One Superstore*	-4,222	-4,080	-3,984
West	-1,008	543	1,091
Scenario	-1,891	-354	181
East	3,352	3,955	4,476
Scenario	3,352	3,955	4,476
South East	-505	-351	-57
Scenario	-505	-351	-57
South West	-3,389	-2,798	-2,553
Scenario	-3,389	-9,621	-9,479

Source: GVA Convenience Capacity Modelling Tables *scenario does not include superstore & express

11.7 In the North sub area, if both Asda and Tesco develop large convenience superstores in New Barnet and a new Tesco Express store came forward as well, this would remove any surplus expenditure capacity available to support new floorspace and result in an oversupply of convenience goods floorspace on the basis of current market shares.

- 11.8 We have examined the effect on capacity of only one superstore coming forward in New Barnet. We consider there would be a smaller oversupply of floorspace on the basis of current market shares. Under a one superstore scenario we estimate that there would be a negative capacity of -4,222 sqm net in New Barnet in 2011, -4,080 sqm net in 2016 and -3,984 sqm net in 2021. A large new foodstore is however likely to increase market share, attracting new customers to the centre.
- 11.9 Other sub areas where some pipeline development is proposed include the West sub area and the South West sub area. In the West sub area pipeline schemes including a new convenience store at Colindale Avenue and unit shops at Mill Hill East result in a relatively modest turnover which would create an oversupply of floorspace in the short-term. As a result of expenditure growth this would have been absorbed by 2021.
- 11.10 In the South West sub area we have not anticipated any pipeline development coming forward by 2011, the capacity forecasts remain the same as in the baseline year. However, we anticipate that the replacement Tesco Extra store and unit shops at Brent Cross South would have been built by 2016 and on the basis of current market share these would create a significant oversupply of convenience goods floorspace. This surplus could be to the extent of -9,621 sqm net by 2016 and -9,479 sqm net by 2021. However, as the whole ethos for Brent Cross Cricklewood is to create a new town centre we anticipate that there will be a significant increase in market share such that the new convenience floorspace would be supported.

Implications of Convenience Superstore Development in New Barnet

- 11.11 We have carried out an initial review of the potential impact of two new foodstores in New Barnet on the key competing centres. The focus of this assessment is on the convenience goods floorspace proposed. We have assessed the impact at 2011.
- 11.12 In order to examine the potential impact of two new convenience stores in New Barnet, we have estimated their proposed turnover. We anticipate that the Asda convenience store in New Barnet could have a convenience goods turnover of £37.9m in 2011. The Tesco proposals are slightly smaller and we estimate that the store would have a turnover of £32.3m in 2011. We estimate that the majority of trade drawn to these stores would be from the survey zone in which New Barnet is located (zone 2) and the adjacent zone (zone 1). For example, we estimate that the Asda store could draw £19.5m of convenience goods expenditure from survey zone 2 and £9.8m of convenience goods expenditure from survey zone 1. We estimate that both stores would also draw some trade from survey zone 13 and from zones 3 and 4.
- 11.13 In order to estimate the impact of these new stores we have determined how the trade drawn to them will affect the forecast turnover of competing centres. The centres most likely to be affected include New Barnet and in particular the existing Sainsbury's store, Chipping Barnet, Whetstone, North Finchley and the local centres in this area, other retail destinations also likely to be affected

include a range of out of centre stores. Table 11.2 summarises the likely impact in terms of the reduction in turnover of these centres/stores in 2011.

Table 11.2: New Barnet Impact Testing (%)

	Impact 2011 Two New Stores	Impact 2011 One New Store
New Barnet	41%	38%
Chipping Barnet	31%	23%
Whetstone	21%	11%
North Finchley	10%	5%
Tesco, Colney Hatch Lane	5%	2%
Tesco Express, East Barnet Road	0	0
Marks and Spencer, Whetstone	0	0
Waitrose North Finchley	1%	1%
Waitrose Mill Hill East	6%	3%
Local Centres	5%	2%
Other	4%	3%

Source: GVA Convenience Impact Modelling Tables, Appendix 5

- 11.14 We forecast that New Barnet and in particular the Sainsbury's store is likely to be significantly affected as a result of two new foodstores in New Barnet. We forecast that without the new stores the turnover of New Barnet would increase from £44.3m in 2008 to £44.6m in 2011. If two new stores came forward this turnover in 2011 would reduce to £26.3m, this is a reduction of £18.2m or a 41% fall in turnover. Whilst this is a major reduction in turnover and may affect the viability of the store in the longer term it would at this level be trading at broadly company average levels.
- 11.15 We also anticipate a fairly significant impact on Chipping Barnet as a result of two new stores in New Barnet. We forecast that Chipping Barnet has a turnover of approximately £21.4m in 2008 and without any new development this would increase to £21.6m in 2011. With two new stores the impact would be to reduce this turnover to £15m in 2011. This is a reduction in turnover of £6.6m or 31%, which is significant and could be a cause for concern. We also anticipate that Whetstone would be affected by two new foodstores in New Barnet. We forecast Whetstone has a turnover of £19m in 2008 increasing to £19.2m in 2011. We anticipate this turnover could fall to £15.1m as a result of two new foodstores in New Barnet. This is a reduction of £4.1m or 21%. This could be a cause for concern for the future of convenience goods retailing in Whetstone.
- 11.16 Other centres likely to be affected by two new foodstores in New Barnet are North Finchley and the neighbouring local centres. We anticipate an impact of potentially 10% and 5% respectively on the turnover of North Finchley and the local centres. These estimates, at 10% or less, should not be a cause for concern. Similarly the estimated impact on out of centre stores is relatively

modest. Tesco, Colney Hatch Lane only draws small amounts of trade from the survey zones covering and adjacent to New Barnet therefore we only anticipate an impact of approximately 5% on the turnover of the store, similarly the Waitrose stores in North Finchley and Mill Hill East only draw modest amounts of trade from this area and therefore we anticipate an impact of 1% and 6% respectively.

- 11.17 In addition to the impact on existing convenience stores in this part of the Borough we also anticipate that two new stores in New Barnet would have a mutual impact on each other such that they would be competing for the same market. We anticipate that Asda would have a 25% impact on the turnover of the Tesco store and Tesco could have a 16% impact on the turnover of the Asda store.
- 11.18 We have also examined the likely impact as a result of just one new convenience store coming forward in New Barnet by 2011. In this scenario we still anticipate a significant impact on New Barnet itself and in particular the Sainsbury's store. We estimate that without any new development the centre would have a turnover of £44.6m in 2011, with a single new store coming forward this turnover would fall to £27.5m in 2011. This is a reduction of £17m or 38%. Whilst this is a significant level of impact, the Sainsburys store would be trading more in line with estimates of company average.
- 11.19 We anticipate that a single store would still result in an impact on Chipping Barnet. We estimate that without any new development Chipping Barnet would have a turnover of £21.6m in 2011. With a new convenience store in New Barnet this turnover would fall to £16.6m, a reduction of £5m or 23%. This is still a fairly significant reduction in the turnover of the centre and could be a cause for concern. We estimate an impact as a result of a single store in New Barnet of 11% on Whetstone, 5% on North Finchley and 2% on local centres. These impact estimates should not be a cause for concern.

Comparison Goods Capacity Forecasts with Pipeline Development

- 11.20 In preparing the scenario to examine the implications for capacity of comparison developments in the pipeline coming forward, we have drawn on estimates from GVA Grimley and information provided by the London Borough of Barnet. We have only identified one significant retail development in the pipeline and this is the Brent Cross Cricklewood application for a new town centre. This development could provide approximately 28,590 sqm net of new comparison goods floorspace which could equate to a turnover of £191m in 2011, increasing to £229m by 2016 and £275m by 2021. We also anticipate some comparison goods floorspace coming forward as part of the offer in new convenience superstores in New Barnet and at Brent Cross South Retail Park. We estimate the residual capacity as a result of new comparison floorspace coming forward in convenience stores in New Barnet in 2011, at Brent Cross South in 2016 and as a result of the Brent Cross Cricklewood development in 2021.

- 11.21 Other pipeline development comprises comparison goods floorspace in large convenience stores.
- 11.22 The global capacity forecasts for the London Borough of Barnet demonstrate that **pipeline developments will meet a significant proportion of capacity up to 2021**. Table 11.3 illustrates that by 2021 the amount of floorspace taken up by proposed developments in the pipeline has the potential to reduce capacity from 81,024 sqm net to 32,301 sqm net. This reduction is almost entirely because of the Brent Cross Cricklewood redevelopment. With this level of capacity it will be more appropriate to plan for modest comparison goods development in the Borough including extensions to existing town centre schemes and more modest extensions to current centres.
- 11.23 We have examined the capacity to support additional comparison goods floorspace in the different sub areas of the Borough and how this would be affected by pipeline development coming forward. There are currently no pipeline schemes for the west or east sub areas and these are where the majority of the comparison goods floorspace capacity is arising. We anticipate capacity for 10,116 sqm net in the West sub-region by 2021 and 9,607 sqm net in the East sub-region by 2021. There is no capacity in the South East sub-region. Modest capacity forecast for the North sub-region would be removed entirely as a result of two new superstores in New Barnet and comparison goods floorspace in these schemes would result in an oversupply of comparison floorspace and a negative capacity throughout the LDF period. Significant capacity is arising in the South West sub area would however be largely addressed by the Brent Cross Cricklewood proposals.

Table 11.3: Barnet Scenario Testing of Comparison Goods Capacity (sqm net)

Scenario	2011 (sqm net)	2016 (sqm net)	2021 (sqm net)
Baseline	11,356	47,917	81,024
With Pipeline Development	7,874	41,174	32,301
North	273	1,015	1,753
Scenario	-3,209	-2,861	-2,562
West	1,947	6,538	10,116
Scenario	1,947	6,538	10,116
East	913	5,058	9,607
Scenario	913	5,058	9,607
South East	-837	-637	-336
Scenario	-837	-637	-336
South West	9,060	35,944	59,885
Scenario	9,060	33,076	15,477

Source: GVA Comparison Capacity Modelling Tables

Summary

- 11.24 In terms of scenarios for convenience goods provision in LB Barnet, we have considered new stores in New Barnet, a replacement Tesco Extra and unit shops at Brent Cross Cricklewood, a new convenience store at Colindale Avenue and new unit shops at Mill Hill East. We consider the provision of a single new superstore in New Barnet and a replacement Tesco Extra and unit shops at Brent Cross Cricklewood town centre would more than meet identified capacity for convenience floorspace based upon current market shares. We therefore consider that there is no quantitative need to plan further significant convenience goods provision in the London Borough of Barnet over and above this over the LDF period. We do not forecast capacity to support two new superstores at New Barnet and a new small format convenience store.
- 11.25 Notwithstanding our conclusions from the quantitative assessment, there may be scope in qualitative terms for new/improved foodstores in defined centres. For example local shopping needs arising from new development at Mill Hill East and Colindale Avenue will mitigate any oversupply of floorspace.
- 11.26 We forecast some capacity for additional comparison goods development in the Borough over the LDF period, following the development of the new Brent Cross Cricklewood town centre. The majority of this capacity arises in the West and East sub-regions and corresponds with the Major Centre of Edgware and the District Centre of North Finchley. We have not identified any schemes at the planning application stage for these areas/centres. In the next Section we examine potential development opportunities.

12. DEVELOPMENT OPPORTUNITIES

12.1 Drawing on preceding sections and discussions with the Council, we have identified possible development opportunities in some of the larger centres in the Borough. This chapter sets out a broad overview of the identified areas of opportunity and, in cases, the uses considered most appropriate for taking them forward.

(i) Edgware

12.2 The Council have already identified a potential site for retail and other town centre development proposals comprising 'land at Forumside' as set out in their UDP. The plan in **Appendix 6a** illustrates the site is bounded by Church Way and the Broadwalk Shopping Centre to the north east; the Railway public house and units along Station Road and High Street to the north west and south west and by office/industrial units to the south east. Comprising approximately 0.4 hectares and situated adjacent to the Broadwalk Shopping Centre the site represents an ideal opportunity to further extend the shopping centre.

12.3 The Council have indicated that they would be supportive of such an extension to improve the quality of the comparison retail offer in Edgware and have sought discussions with new owners, the Bridehall Group, over a potential scheme. We also understand that such a scheme would have the backing of Sainsbury's as the shopping centres key anchor. The UDP considers a mix of retail, business, housing and leisure development appropriate uses for the site.

12.4 There is also opportunity to improve the Underground and bus station facilities which are ill-configured and lack integration with the shopping centre. The Council would support the redevelopment of these facilities to create better pedestrian linkages with the centre in combination with further enhancements to the public realm, particularly around the entrance to the shopping centre and further south along Station Road.

(ii) Burnt Oak

12.5 The Barnet UDP identifies Watling Avenue car park, the site of the centre's market, as a potential opportunity site for a supermarket or superstore development. We are aware that Tesco currently have an option on the site, however we also understand that there are issues relating to flood risk which create some uncertainty about deliverability. The site is illustrated on the Plan in **Appendix 6b**.

(iii) Colindale - The Hyde

12.6 The Council are aware of a large-scale redevelopment of the Oriental City site which has been approved by the London Borough of Brent and proposes 28,566 sqm A1 retail comprising a replacement Oriental City outlet, DIY store and furniture store in addition to 520 residential units,

a nursery, primary school and health and fitness centre (totally 9,832 sqm), located across eight blocks rising to seventeen storeys.

- 12.7 Taking into consideration the level of potential growth, the Council is preparing the Colindale Area Action Plan (Preferred Options - September 2008) which sets out the Council's aspirations for the regeneration of the Colindale area, focussing around four key corridors of change. The plan identifies provision for a 2,500 sqm convenience foodstore on Colindale Avenue as part of a new focus of activity to link in with the key transport facilities in the area. Other small-scale provision is proposed to complement residential proposals within the Edgware Road and Grahame Park Way corridors of change. We have not identified sufficient capacity to support a new foodstore in this sub-area. However, other qualitative considerations such as the local shopping needs of new residents will add weight to the need for new provision.

(iv) Cricklewood

- 12.8 Our review of the centre identified two vacant derelict sites with potential for redevelopment. The first, 214-218 Cricklewood Broadway, is situated adjacent to the Beacon Bingo unit and the telephone exchange; however, we understand that the Council has recently granted planning permission for a 64-bed hotel development on this site as indicated on the Plan in **Appendix 6c**.
- 12.9 The second vacant site is situated on the corner of Cricklewood Broadway and Depot Approach. We are aware from our discussions with the Council that the B&Q car park situated to the rear of the site is underused and there is considered potential for the redevelopment of the wider site. There may also be scope to incorporate the B&Q and adjacent retail units to bring forward a much larger scheme with the option to create key frontage on both Cricklewood Broadway and Cricklewood Lane. A scheme in this area would also allow better integration of Cricklewood Station and Cricklewood Lane with the rest of the centre along Cricklewood Broadway.
- 12.10 We have not identified capacity to support significant new development at Cricklewood based on its current market share. However, the market share of the centre may increase in the longer term as a result of the Brent Cross Cricklewood redevelopment and this may create some floorspace capacity.

(v) Chipping Barnet

- 12.11 The Barnet UDP identifies the land to the rear of 98-140 High Street (**Appendix 6d**) as a potential site for a mix of retail, business, leisure, community and residential uses. The site comprises a broad mix of uses, mainly commercial and storage units, whilst other parts are currently vacant and in need of development. The Council have highlighted that a number of piecemeal development proposals, involving office and residential uses, have come forward on parts of the site, which is in multiple ownership. The location of the site to the rear of existing retail units, and the multi-state of ownership, suggests that it would be appropriate for development to continue to come forward in this manner. Residential development that will complement the retail uses on the

main high street is considered the most suitable use although where the market dictates some additional office development may also be appropriate.

- 12.12 There is also potential opportunity for an extension to the Spires Shopping Centre. An adjacent site, formerly occupied by the market, has remained vacant despite consent for its redevelopment to provide a new market facility with residential units above. This site is located adjacent to the rear of the Waitrose unit and would present a good opportunity to extend the foodstore as part of a wider extension to the main shopping centre. It would also offer potential to create a further access to the shopping centre fronting onto St Alban's Road

(vi) New Barnet

- 12.13 The New Barnet Gas Works located off Albert Road is identified in the UDP as a potential site for mixed-use residential, office, retail and leisure development. Despite being an edge of centre site, the Barnet UDP acknowledges that the southern-most section of the site is sufficiently close to the existing centre to be suitable for leisure and retail development. Asda have submitted a planning application for a new foodstore as part of a wider mixed use scheme involving 211 residential units and a further floorspace for additional retail or community uses.
- 12.14 Our review of the centre identified a concentration of vacant units situated on the corner of New Barnet Road and Victoria Road. These units form part of a development site for a mixed-use scheme proposed by Tesco involving a new foodstore and other retail, residential and community uses fronting onto the main high street. The redevelopment of these units would enhance the attractiveness of the centre. However, on the basis of current market shares we do not consider there to be sufficient capacity for two new foodstores in addition to the existing Sainsbury's on the high street. There would also be a risk of undermining the provision in nearby Chipping Barnet should either of the foodstore developments come to fruition.

(vii) Whetstone

- 12.15 Our review of the centre identified two vacant sites situated to the east of the High Road towards the north of the centre, either side of the M&S Simply Food and Carpetright retail units (**Appendix 6e**). Both sites have been subject to development proposals and the Council have recently recommended approval for A1-A3 retail uses and B1 business use development for one (former BP filling station). These sites are situated towards the edge of the town centre and the principle of mixed use development including office and residential uses is supported by the Council. Limited retail uses may also be considered subject to appropriate retail assessment. There is opportunity for similar development at the site opposite, currently occupied by a storage warehouse.
- 12.16 Our discussions with the Council have highlighted several other potential areas of opportunity towards the southern section of Whetstone. Barnet House, situated at the main junction between High Road and Oakleigh Road North, and the adjacent B&Q unit are both dated buildings in need of improvement. In combination, the sites represent an extensive opportunity area for mixed-use
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redevelopment however, the Council highlight that improvements to the road junction where Oakleigh Road North meets the High Road would be a pre-requisite to any major development scheme.

(viii) North Finchley

- 12.17 The Council are preparing a Town Centre Planning Strategy for North Finchley which will identify a range of sites of potential change. Our overview has highlighted a range of opportunities on the High Road (Plan in **Appendix 6f**). These include the scope to create larger format units that would be more suitable to meet modern retailer demands and bring about further enhancement of the existing retail offer. A key opportunity site is at the Grand Arcade which is unattractive and in need of redevelopment to allow better integration with the new Arts Depot and bus station development. A mix of new comparison retail floorspace with a range of complementary town centre uses would be beneficial to enhance the vitality and viability of the centre.

(ix) Finchley Church End

- 12.18 Areas of opportunities in Finchley Church End are relatively limited due to constraints of surrounding residential areas and the rail network (**Appendix 6g**). The Council consider the Tesco store, the centre's key anchor, has the potential for redevelopment and expansion, to raise the standard of the store offer and to secure the ongoing vitality and viability of the centre as a whole. There is also some scope to enhance links between the centre and the London Underground station and improve the retail provision around key access points to the Station. Towards the south of the centre, there are several out-dated office buildings that would benefit from redevelopment.

Summary

- 12.19 Through our review of each centre and subsequent discussion with the Council we have identified potential development sites and areas of opportunity in the following centres:

- Edgware
- Burnt Oak
- Colindale - The Hyde
- Cricklewood
- Chipping Barnet
- New Barnet
- Whetstone
- North Finchley
- Finchley Church End

- 12.20 The key opportunities for substantial enhancement in the comparison retail offer are located within the major centre of Edgware and North Finchley district centre. Subject to acquisition of
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the former market site, there may also be scope to raise the comparison goods offer in Chipping Barnet. There is also potential for some new convenience goods floorspace to come forward in New Barnet. Whetstone offers opportunity for other town centre uses and mixed-use residential developments. Similarly, there are opportunities for Burnt Oak, Colindale - The Hyde and Cricklewood that would bring vacant sites into use and enhance the overall attractiveness of the centres.

13. CONCLUSIONS AND RECOMMENDATIONS

Overview

i) Hierarchy

- 13.1 This report has reviewed the town centres and retail parks in the Borough. The current UDP sets out the Borough's retail hierarchy as comprising one regional shopping centre (Brent Cross), one major centre (Edgware), 14 district centres, five local centres and ten neighbourhood centres. It also notes that there are a number of out-of-centre retail facilities that do not form part of the town centre network. These definitions reflect those in The London Plan.
- 13.2 **Our analysis of Brent Cross and Edgware highlights that the Borough's two largest centres are generally performing well and in line with their respective positions in the retail hierarchy.** Brent Cross has a relatively limited convenience and service provision, reflecting its regional shopping centre function, this will however, be addressed with the re-development of the Brent Cross Cricklewood area and the provision of a new town centre which will have a Metropolitan role in this north-west part of London. Edgware has a wide variety of retail provision serving a Major Centre.
- 13.3 There are variations between the district centres in terms of their scale, retail offer and overall role in the Borough. Of all the district centres, Chipping Barnet and North Finchley benefit from a superior retail offer. Golders Green and Mill Hill also benefit from reasonable multiple retailer representation. In Golders Green these are largely service operators, whereas Mill Hill has a high quality comparison offer, including some designer boutiques. Whetstone and Temple Fortune have a similar high quality offer, with a number of specialist, boutique shops. Temple Fortune also has a higher than average convenience provision and Whetstone has a strong service destination function. East Finchley primarily performs a service and convenience role with a limited comparison function.
- 13.4 **North Finchley, Chipping Barnet, East Finchley, Golders Green, Mill Hill, Temple Fortune and Whetstone district centres are vital and viable and performing their role in the town centre hierarchy well. As outlined below, we consider that the town centre strategy should seek to elevate North Finchley to a Major Centre in the hierarchy.** This reflects its current role and performance, and the scope for new development.
- 13.5 The remaining district centres in the Borough, including Brent Street, Burnt Oak, Cricklewood, Colindale - The Hyde, Finchley Church End and Hendon Central, have a lower quality retail offer, with fewer multiple retailers and more limited comparison goods provision. Finchley Church End caters well for both convenience and service needs. Tesco is the key anchor, but the store is dated and would benefit from enhancement. Burnt Oak and Cricklewood have a high convenience offer, particularly catering in kosher/ethnic goods, and this appears to be their core function. In contrast, Brent Street, Hendon Central and Colindale - The Hyde perform a greater
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service role. These centres are heavily traffic-dominated detracting from the overall quality of the environment. Our quantitative assessment shows that Brent Street, Burnt Oak, Finchley Church End and Cricklewood all have a low level of trading for comparison goods and Finchley Church End, Burnt Oak, Cricklewood, and Hendon Central are also amongst the centres performing less well for convenience goods.

- 13.6 **Whilst Brent Street, Burnt Oak, Cricklewood, Colindale - The Hyde, Finchley Church End and Hendon Central district centres are not as healthy as some of the other centres in the hierarchy we do not consider their status in the town centre hierarchy should be altered.**

We have highlighted weaknesses in these centres in the town centre strategy and made recommendations for improvements.

- 13.7 New Barnet is the only district centre which has less than average provision in all retail categories. The centre is anchored by a large Sainsbury's but there are also a number of vacant units contributing to an above average vacancy rate. A concentration of these vacant units comprises two potential development sites as both Asda and Tesco have interests in providing new convenience stores in the centre. In the event that neither proposal comes forward, the centre will continue to fulfil its District Centre status, in accordance with the definition set out in PPS6 (containing a supermarket or superstore and a range of other shops and services). **Therefore we do not consider the need for the current position of New Barnet in the retail hierarchy to be reviewed.**

- 13.8 The five local centres in the Borough, East Barnet, West Hendon, Friern Barnet, Childs Hill and Market Place are more comparable in terms of their overall scale and offer which is largely service-orientated. West Hendon is also the local centre which appears most dilapidated, deprived and very much in need of enhancement. This has been recognised by the Council and the centre has been identified within the Cricklewood, Brent Cross, and West Hendon regeneration area. The ten neighbourhood centres are also broadly similar inline with their status at the base of the retail hierarchy. All centres are largely service-orientated, with high representation of cafes, fast-food takeaways and other food and drink operators and those providing health and beauty services. There appears to be adequate convenience provision, usually consisting of small newsagents/convenience stores.

- 13.9 **We do not consider there is any justification to change the designations of the local and neighbourhood centres in the retail hierarchy.**

ii) Convenience Goods

- 13.10 The qualitative analysis has highlighted a good convenience store provision in LB Barnet. The major centre of Edgware and all of the district centres have at least one convenience store. The larger centres have more convenience units and contain larger stores with a more varied product range. Many of the foodstores are operated by national multiples. Many of the centres also have a range of other convenience uses, such as independent butchers, bakers, greengrocers and delicatessens. The local and neighbourhood centres in Barnet also have some convenience goods provision, with small anchor foodstores in the local centres of East Barnet, West Hendon and Friern Barnet.
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- 13.11 We have also identified eight out of centre convenience stores in the LB Barnet. These include four convenience superstores and three supermarkets and one petrol filling station store. Whilst Tesco have the strongest presence, operating three of the eight out of centre foodstores, all of the operators are represented.
- 13.12 Our convenience goods assessment indicates a mixed performance by foodstores in Barnet. Some centres are performing really well, largely as a result of strong anchor convenience stores, for example, North Finchley, New Barnet and Golders Green. Others show a more average performance, for example Brent Cross, Edgware, Brent Street, Chipping Barnet, East Finchley, Colindale - The Hyde and Whetstone. Whereas some, according to the survey results are performing less well, for example, Finchley Church End, Mill Hill, Temple Fortune, Burnt Oak, Cricklewood, and Hendon Central.
- 13.13 There is also a mixed performance by the out of centre stores. The survey has identified a poorer performance by Marks & Spencer Whetstone, Sainsburys The Hyde and Tesco Brent Cross South. The Tesco Colney Hatch Lane has the strongest performance, other out of centre stores trading well include the Tesco Express (filling station) East Barnet Lane and the Waitrose stores in North Finchley and Mill Hill East.
- 13.14 The forecasts show limited convenience goods capacity in the Borough in the short term (to 2011). By 2016 global capacity is forecast for 3,233 sqm net of convenience goods floorspace, increasing to 5,028 sqm net by 2021. Most of the convenience capacity is arising in the East (North Finchley) and North (Chipping Barnet and New Barnet) sub areas of the Borough. Some capacity also arises in the West (Edgware) sub-area beyond 2016. **This capacity will however more than be met by stores already in the pipeline and as such we consider that there is little quantitative need to plan further significant convenience goods provision in the London Borough of Barnet over the LDF period.**
- 13.15 The provision of a single new superstore in New Barnet and a replacement Tesco Extra as part of the new Brent Cross Cricklewood town centre would more than meet the identified capacity. However, the new town centre development at Brent Cross Cricklewood will create market share to support the new convenience floorspace and there is also likely to be scope in qualitative terms for new/improved convenience goods provision in defined centres and in new local neighbourhood centres such as Mill Hill East and Colindale.

iii) Comparison Goods

- 13.16 The analysis highlights a good comparison shopping provision in Brent Cross, Edgware major centre and district centres including North Finchley, Chipping Barnet, Mill Hill, Temple Fortune and Whetstone. The remaining district centres have some comparison goods provision although this is more focused on everyday household goods. The smaller centres in the hierarchy do not have such a significant comparison shopping function. They provide more specialist comparison shopping and everyday household items.
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- 13.17 Retail warehousing provision in LB Barnet also contributes to the comparison shopping offer. The retail parks provide for much of shopper's bulky goods needs. The analysis indicates that town centre type retailers are not dominating the out of centre provision in the Borough and the Council should continue to ensure that this is the case.
- 13.18 Our assessment of comparison goods also shows a mixed performance. According to the survey certain centres such as Brent Cross, Mill Hill and North Finchley are trading very well, whereas others such as Brent Street, Burnt Oak, Finchley Church End and Cricklewood have a low level of trading. The retail parks are under performing, whereas the free standing DIY stores are performing well.
- 13.19 For comparison goods on the basis of current market shares, increases in population and disposable income will increase the available comparison spend, creating capacity for additional retail floorspace. We forecast a comparison goods capacity of 11,356 sqm net by 2011, increasing to 47,917 sqm net by 2016 and 81,024 sqm net by 2021. This is a very significant amount of floorspace, it will however largely be absorbed by the development of the new Brent Cross Cricklewood town centre.
- 13.20 Following the development of the new Brent Cross Cricklewood town centre and assuming continued expenditure growth, we forecast some capacity for additional comparison goods development in the Borough over the LDF period. The majority of this capacity arises in the West and East sub-regions and corresponds with the Major Centre of Edgware and the District Centre of North Finchley. There is also a very limited amount of capacity in the North sub-area which includes Chipping Barnet. **We have identified development opportunities in Edgware, North Finchley and potentially Chipping Barnet and as such these centres should be the priority for new comparison goods development. In line with Government policy, it will be necessary to direct global capacity to town centres in the first instance, out of centre development should be resisted particularly as we have identified a range of town centre development opportunities.**

iv) Development Opportunities

- 13.21 **It will be important to ensure that new development is of an appropriate size and scale to centre in which it is proposed.** This study identifies a range of potential development sites and areas of opportunity in different centres in the Borough. The key opportunities for substantial enhancement in the comparison retail offer are located within the major centre of Edgware and North Finchley district centre. Subject to acquisition of the former market site, there may also be scope to raise the comparison goods offer in Chipping Barnet. New Barnet offers an opportunity for additional convenience goods floorspace, in conjunction with a mixed use development, on the allocated gas works site. Whetstone offers opportunity for other town centre uses and mixed-use residential developments. Similarly, there are opportunities for Burnt Oak, Colindale - The Hyde and Cricklewood that would bring vacant sites into use and enhance the overall attractiveness of the centres.
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v) Primary Frontages and Town Centre Boundaries

- 13.22 In accordance with PPS6, LPAs are required to define the extent of their primary shopping area and the town centre. This is more appropriate for larger centres, where the primary shopping area can be defined relative to other areas of leisure, business and other main town centre uses. The Barnet UDP (2006) identifies primary and secondary retail frontages for the Borough's major and district centres which are illustrated in **Appendix 7**. The UDP does not specifically define boundaries for any of the centres in the Borough.
- 13.23 For the purposes of this study we have defined the centres in accordance with the data for each centre provided by the Borough council. This is drawn from an Experian analysis of each centre. It has not been part of this study to review all current definitions of primary and secondary retail frontages in LB Barnet.
- 13.24 **It could be useful, particularly for the purposes of clarifying between town centre and edge-of-centre sites for the Council to undertake further work on frontages and boundaries.** This could review and update all the frontages, including assessing those district centres that do not currently have any designations, to judge if they are now of a sufficient size to warrant designations. For the larger centres of Edgware and North Finchley it will also be appropriate to define a town centre boundary.

vi) Other Uses

- 13.25 Our leisure expenditure projections have identified significant growth in the leisure sector across the study area. Given that the Government's objective is to maintain and enhance the vitality and viability of town centres, **we recommend that the strong growth in leisure expenditure should be directed to defined centres in the Borough.**
- 13.26 Barnet currently has a good provision and choice of commercial leisure and tourist facilities. The need for additional facilities including cinemas, bowling, bingo, health & fitness clubs and hotels will largely be determined by the market. Where proposals come forward they should however be the subject of criteria based policies which seek to focus new development in existing centres, to enhance the vitality and viability of centres and not to detract from the primary shopping frontages.
- 13.27 There is quite a high level of leakage from the pub/club and restaurant sectors most notably to Central London as well as other competing centres outside of the Borough. **As such there is considerable scope for centres in Barnet to improve and enhance their evening economy offer. However, this would call for a co-ordinated approach to ensure an inclusive and safe night time economy which would extend the vitality and viability of centres into the evening.**
- 13.28 We advise that retail uses should continue to be protected to underpin the vitality and viability of the Borough's major and district centres, as well as the local and neighbourhood centres.
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However, **we consider that it will be appropriate to maintain a more flexible policy approach in secondary frontages, enabling the representation of A3 and A4 uses which can enhance the vitality and viability of the centre and encourage longer trip times.** Tighter control of A5 (hot food/take away) uses may be appropriate for amenity and environmental reasons.

- 13.29 There is currently a single office market operating within Barnet, largely consisting of small units in lower grade stock located in the town centres and the two business parks. As such, supply is adequate to meet current demand levels, but there is no capacity for large scale developments to attract larger occupiers to the Borough. Barnet is not presently a strategic office location, the majority of stock is second hand and no major deals have been achieved in recent years. The current stock is designed to serve a particular locality and does not attract large scale developments to serve a wider area. This is primarily due to the historical nature of North London as an industrial and warehousing location which has resulted in an overall lack of high quality office supply.
- 13.30 In the future it appears that Barnet will become an increasingly significant office location within North London. This is supported by the growth agenda, promoted through the North London DIF, and demonstrated through the projection of the increasing presence of the Financial and Business Services sector. The projected increase in this sector's presence will in turn increase demand for office space within the Borough.
- 13.31 In order for Barnet to meet increased demand, new office space is required which needs to be of a high specification and offer a mix of small and large accommodation. This space is most likely to come forward in new build schemes, such as Brent Cross/Cricklewood or in new business parks across the Borough. **The Council will have to consider the strategic office location strategy alongside the town centre strategy as the indication is that businesses will be seeking office accommodation on business parks in the right location, with good transport links and with suitable stock. These locations are not necessarily in the existing town centres.**
- 13.32 We consider that western parts of the Borough where the M1, the A5 and the North Circular are easily accessible are the most viable locations for high specification office development. This supports the major role Brent Cross/Cricklewood will play in the future provision of office space within Barnet. The proposed development here is likely to appeal to large businesses servicing a much wider area than those businesses currently located in the Borough. There is also potential for Barnet to capitalise on firms wishing to move to North London and overcome the existing trend for such firms to relocate to Hertfordshire and areas outside of the M25 due to present stock restrictions in the Borough.

Town Centres Strategy

(i) Brent Cross Regional Shopping Centre

- 13.33 Brent Cross has a retail offer that reflects its status as a regional shopping destination. It is dominated by multiple comparison goods retailers. Convenience and service operators perform more of a complementary role. There are few vacant units, and evidence of new retailers moving in as well as high retailer demand. Rents are high and yields are low, indicating good investor confidence. The centre benefits from a pleasant shopping environment and good accessibility from a range of transport modes. Whilst it is considered to be performing its position in the retail hierarchy, the centre is relatively dated and does not meet modern standards by offering a total shopping and leisure experience. The majority of units are small, particularly for current retailer requirements and several of the larger stores have a compromised floorplate. The proposals to redevelop the Brent Cross Cricklewood area and create a modern town centre with a residential community and additional business and community uses will address these issues and ensure the long-term vitality and viability of the centre.
- 13.34 It will be essential to ensure that the Brent Cross Cricklewood scheme comes forward over the LDF period. Our assessment indicates that Brent Cross is performing very well. It has a comparison goods turnover of approximately £700m and this equates to a sales density of £11,172 per sqm net which is a very high level of trading. We have identified more than sufficient capacity to support the comparison goods proposals on the basis of existing market shares and it is likely that the new town centre will enhance market share, clawing back trade currently lost to other destinations, including the newly opened Westfield London, at Shepherd's Bush. Although the convenience goods performance is not as strong, the market share will increase with all the new development such that this floorspace will be supported.

(ii) Edgware Major Town Centre

- 13.35 Edgware is a sizable centre offering a diverse range of shops and services with representation from high street multiple retailers in addition to a range of local independent operators. There is also a notable provision of specialist ethnic or kosher goods, particularly in the convenience sector. It has a covered shopping centre, the Broadwalk Centre which is anchored by Marks and Spencer and Sainsbury's. The centre is easily accessible from a range of transport modes and there are good pedestrian links both throughout the centre and to surrounding residential areas. The quality of the environment varies with some areas, such as the Broadwalk Centre and parts of Station Road, in a significantly better overall condition than others. The centre has a below average vacancy rate and a number of established requirements which in addition to evidence that new multiple retailers such as Starbucks are moving are all indicative of investor confidence.
- 13.36 Edgware is considered to be performing well in its role as the Borough's major town centre, although in the short term the centre could benefit from some environmental improvements, particularly to the south of Station Road, which would benefit the centre's attractiveness and

create a more consistent and pleasant shopping environment throughout. The external appearance of the Broadwalk Centre is dated, as is the Marks and Spencer store, links with the Underground and bus station are inadequate and there is a lack of large floorplates in the centre. There is a key development opportunity next to the Broadwalk Centre at the Forumside and this should be taken forward in the LDF.

- 13.37 We consider that Edgware is performing adequately for convenience goods. Whilst the Sainsbury's store in the Broadwalk Centre and other convenience stores in the town centre are trading well, the Marks and Spencer Food Hall appears to be underperforming. Edgware is located in the West sub-region of the Borough and we have not identified any capacity for additional convenience goods floorspace in this area. Edgware is trading better for comparison goods, although it has a lower turnover than North Finchley. We have however, identified some capacity for additional comparison goods floorspace in the West sub region and the opportunity for new development in Edgware would address this.
- 13.38 The strategy for Edgware must focus on maintaining and enhancing the vitality and viability of this major centre and securing the redevelopment and extension of the Broadwalk Centre. This new development would increase the turnover and market share of the centre and should enable the accommodation of more national multiple comparison retailers in larger modern units. There would also be potential to extend or redevelop the Sainsbury's store to enhance the convenience offer in the centre. Whilst we have not identified capacity to support this, an increased market share by virtue of the overall redevelopment of the Broadwalk Centre should support new floorspace.

(iii) North Finchley District Centre

- 13.39 North Finchley benefits from good representation of multiple high street retailers and service provider and benefits from key attractors including the Sainsbury's and (out of centre) Waitrose foodstores in addition to the large Homebase south of the centre. The centre generally displays a clean and high quality shopping environment and there are obvious signs of on-going investment. There are also development opportunities to further enhance the retail offer and expand the centre, particularly in the south.
- 13.40 North Finchley has a strong convenience and comparison goods turnover, with a combined total turnover of just over £100m which is not dissimilar from Edgware. It is located in the East sub area of the Borough and we have identified capacity in this area for additional convenience and comparison goods floorspace.
- 13.41 The town centre strategy should seek to elevate North Finchley to a Major Centre in the town centre hierarchy. This would be particularly appropriate if new development could be secured on the Grand Arcade site. It would provide a good opportunity to secure a mix of comparison goods floorspace with a range of town centre uses.

(iv) Chipping Barnet District Centre

- 13.42 Chipping Barnet 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 development, largely occupied by multiple high street retailers and anchored by the Waitrose foodstore. The centre is well represented in terms of food and drink outlets, particularly coffee shops and cafes. There is a development opportunity to expand and enhance the Spires Shopping Centre.
- 13.43 According to the household survey, the turnover of Chipping Barnet is more modest than the other District Centres of North Finchley and New Barnet. The centre is located in the North sub area of the Borough where we have identified modest capacity for additional convenience and comparison goods floorspace. This would however be absorbed by a new superstore in New Barnet.
- 13.44 The town centre strategy should seek to maintain and enhance Chipping Barnet as a District Centre. Opportunities for new development should be supported, particularly where this will enhance the vitality and viability of the centre. If development proposals come forward for the Spires Shopping Centre this would be of considerable benefit to Chipping Barnet. However, we suggest that it should remain a District Centre over the LDF period

(v) East Finchley, Golders Green, Mill Hill, Temple Fortune, Whetstone District Centres

- 13.45 East Finchley, Golders Green, Mill Hill, Temple Fortune and Whetstone District Centres are vital and viable and performing their role in the town centre hierarchy well. Each centre has a main food store, albeit a modest Marks and Spencer Simply Food in Mill Hill and a Budgens in East Finchley. They all offer a range of comparison goods shopping and service uses and all generally have a low vacancy rate. There is a strong demand for comparison floorspace in Golders Green and a number of requirements from service operator in Mill Hill. All the above centres benefit from a generally pleasant environment, good parking and access to London Underground or mainline railway stations, in addition to strategic bus routes.
- 13.46 The convenience goods offer in Golders Green is good with both a Sainsbury's and Tesco store as well as a range of other local provision that is all performing well. In Mill Hill the convenience stores, according to the survey, are not performing well, although this may be a result of the survey underestimating the use of the Marks & Spencer store for top-up shopping. Mill Hill does however, benefit from a good comparison offer with a strong performance in this respect.
- 13.47 Temple Fortune has a good convenience and comparison offer, neither sector is performing particularly well based upon the results of the household telephone survey. Although the Waitrose store is quite cramped and dated the rest of the offer in the centre is not compromised and the survey may have just under represented the centre. Whetstone appears to have an adequate

convenience goods performance and a strong comparison goods performance. East Finchley has a modest convenience performance, reflecting the lesser offer in the centre and a stronger comparison performance.

13.48 Overall we have identified limited need for further development in these District Centres. The strategy should be to maintain their vitality and viability, and enhance it where opportunities arise. An expansion of the Sainsbury's in Golders Green would benefit the centre. Mill Hill and Temple Fortune are very constrained, but we anticipate little scope or need for further development in either centre. We have not identified opportunities for further development in East Finchley.

13.49 In Whetstone there are a number of opportunities for further development. We have identified some comparison goods capacity in the East sub area of the Borough and if this is not utilised by North Finchley there may be scope for further development in Whetstone. This is however, unlikely to be a significant comparison goods shopping destination and any development would have to be appropriate to the scale and form of the centre. We have identified some convenience goods capacity in the East sub area of the Borough. This could be met in Whetstone and there are a number of potential development opportunities, particularly towards the southern part of the centre.

(vi) Brent Street, Burnt Oak, Cricklewood, Colindale - The Hyde, Finchley Church End, New Barnet, Hendon Central District Centres

13.50 Brent Street, Burnt Oak, Cricklewood, Colindale - The Hyde, Finchley Church End, New Barnet and Hendon Central District Centres are not as healthy as some of the other centres in the hierarchy. On the whole, they have a lower quality retail offer, with fewer multiple retailers represented and generally more limited comparison goods provision.

13.51 Finchley Church End caters well for both convenience and service needs. Tesco is the key anchor but the store is somewhat dated. Further environmental improvements elsewhere in the centre would benefit overall vitality. Burnt Oak and Cricklewood would also benefit from on-going investment in the public realm to enhance the quality of the shopping environment.

13.52 Burnt Oak and Cricklewood have the greatest number of convenience units of the district centres, particularly shops selling kosher/ethnic convenience goods and this appears to be their core function. In contrast, Brent Street, Hendon Central and Colindale - The Hyde perform a greater service role. These centres are all heavily traffic-dominated and would also benefit from additional soft landscaping measures to alleviate the impacts of the road network.

13.53 New Barnet is anchored by a large Sainsbury's which currently represents the main retail offer for the centre. The centre has a number of vacant units and an above average vacancy rate. There is a level of retailer interest in New Barnet and planning applications have been submitted by both Asda and Tesco for new foodstores in the centre. In addition to their recent application, Tesco

have also secured planning permission for a Tesco Express which was upheld by appeal in April 2009. In the event that neither of the larger store proposals comes forward, the centre will continue to fulfil its current role as a district centre.

- 13.54 Cricklewood, Colindale - The Hyde and Hendon Central have very low convenience goods turnovers. In Colindale - The Hyde the comparison goods turnover is also low, whilst the comparison turnover is higher in Hendon Central we consider this is a survey anomaly as there is very little comparison goods provision in the centre. Cricklewood also has a higher comparison goods turnover, although there is a considerable comparison goods provision in the centre and consequently its performance is poor. There is no capacity for additional convenience or comparison development in any of these centres. A new convenience store is planned on Colindale Avenue as part of the redevelopment package for the area. Although we have not identified quantitative capacity to support this store, it will benefit the new local residential population. Similarly Cricklewood may attract new development in the future as part of the Brent Cross Cricklewood redevelopment. An increase in market share attracted to the centre would support new development and there are a number of potential opportunity sites.
- 13.55 Brent Street and Burnt Oak have a similar level of convenience goods turnover. In Brent Street the Tesco store is performing adequately, but in Burnt Oak the Tesco store is not doing as well and the performance of other convenience stores in Burnt Oak is not very strong. Neither centre has a particularly strong comparison goods turnover. We have not identified any capacity to support additional convenience or comparison floorspace in either of these centres. There is a UDP allocated site for the development of a new foodstore in Burnt Oak although as we understand it this is unlikely to come forward for a number of reasons. We therefore consider the focus should be on improving and enhancing the existing provision in Burnt Oak as far as possible over the LDF period.
- 13.56 Finchley Church End and New Barnet have quite a high level of convenience goods turnover, although the Finchley Church End turnover is well below average and the New Barnet turnover is well above average. Both centres have a modest comparison goods turnover. Finchley Church End has considerably more comparison floorspace, resulting in a poorer comparison goods performance.
- 13.57 New Barnet is located in the North Sub area where we have identified some capacity for additional convenience and comparison goods floorspace. Two new convenience superstores are in the pipeline for New Barnet and we anticipate that if one came forward it would more than utilise all the capacity and result in an oversupply of both convenience and comparison goods floorspace. We also anticipate a negative impact on surrounding centres including Chipping Barnet and Whetstone. A more appropriate strategy would be the addition of only one new convenience store in New Barnet and as far as possible the size of this should be constrained to allow scope for new development elsewhere in this part of the Borough, including at Chipping Barnet and Whetstone.
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- 13.58 Finchley Church End is located in the East sub area, we have identified some capacity for additional convenience and comparison goods floorspace. The convenience goods capacity could however be utilised by a new convenience store in Whetstone and the comparison goods capacity by new development in North Finchley. Given the poor performance of existing space in Finchley Church End the strategy should seek to improve and enhance the existing provision as far as possible over the LDF period.

(vii) Local and Neighbourhood Centres

- 13.59 The five local centres in the Borough are comparable in terms of their overall scale and offer which is largely service-orientated. East Barnet, West Hendon and Friern Barnet each benefit from having a small anchor foodstore, although this is absent in Childs Hill and Market Place. West Hendon is identified as the most deprived and in need of enhancement, however the planned future regeneration of the area will resolve this. Friern Barnet, and to a lesser extent Childs Hill, would also benefit from some investment in the public realm to improve integration and raise the quality of each centre's environment.
- 13.60 The ten neighbourhood centres are also broadly similar inline with their status at the base of the retail hierarchy. All centres are largely service-orientated, with high representation of cafes, fast-food takeaways and other food and drink operators and those providing health and beauty services. There appears to be adequate convenience provision, usually consisting of small newsagents/convenience stores, in all centres aside from Hampden Square. The overall quality of the environment in each centre varies, with Grahame Park, New Southgate, Deansbrook Road, Apex Corner identified as those that would most benefit from further improvements.
- 13.61 The local and neighbourhood centres in the Borough should be maintained and enhanced. Most of the centres are in need of some level of environmental improvement including improvements to the appearance of shop fronts and pavements and in those centres that are traffic-dominated some additional soft landscaping to mitigate the impact of heavy traffic.