

Introduction

This chapter presents the transport baseline analysis carried out by sub-consultants Colin Buchanan setting out the context for transport within and around Colindale. The chapter is structured around different modes of transport; highways and traffic, bus services, rail and walking and cycling. The chapter then looks at the impact of future development on current transport conditions, before drawing findings together in a final set of conclusions.



Colindale Underground entrance, Colindale Avenue

Highways and Traffic

Highway Network

The Colindale AAP area is in very close proximity to a number of strategic routes, of local and national significance.

The M1 motorway and A1/A41 form the eastern boundary and the A5 the western edge of the study area. The A406 north circular road is also just to the south of the study area.

These key routes provide good strategic linkages but also cause the problem of heavy traffic volumes in the local area, with high numbers of through trips on these routes leading to more localised congestion.

Colindale Hotspot Model

TfL/ LBB have commissioned the production of a detailed highways model to run alongside the AAP process.

This model has been termed the 'Colindale hotspot model'. The traffic surveys, base year and prediction model are being produced by another consultant, Hyder, not part of the project team.

CB have been liaising with Hyder regarding the development of the model, which will ultimately be handed over to CB for the purposes of testing the preferred options for development and this assessing the feasibility of the

AAP in highways terms.

The traffic surveys report, the first stage of the modelling process, is not yet available. Subsequent to this will be the production of a base model and calibration/validation report and then the prediction model, for estimating future flows.

Highways Improvements

The AAP will have to take account of committed highway improvement schemes in Colindale as well as further aspirations for highway improvements, such as junction improvements and capacity or priority schemes.

Aerodrome Road

Aerodrome Road is currently a major constraint on capacity on the local highway network, due to the restrictive road width passing under three key road and rail bridges. The bridges, in their present form, restrict highway movements to alternate streams with one direction of traffic flow ceding passage to the opposite direction.

There is a committed scheme in place to widen the bridge arches and sink the road to allow for unimpeded two way flow of traffic. This will be fundamental to improving the connectivity of Colindale as it will facilitate access for double decker buses. The present estimated completion of these works is

9-12 months.

Lanacre Avenue

As part of the wider redevelopment of Grahame Park there are proposals to realign Lanacre Avenue, approximately 10 metres to the east and to improve the junction with Grahame Park Way. Colindale Avenue/A5 Junction

LBB highways have cited problems with the existing A5/ Colindale Avenue junction, notably in terms of capacity. Under the present alignment the right turn movement from Colindale Avenue onto the A5 (Edgware Road) is banned due to capacity constraints.

The present layout and traffic levels are also detrimental to the amenity of non-car users, i.e. pedestrians and cyclists.

The Colindale hotspot model will be used to develop and test suitable design options for this junction.

Proposed Montrose link road

A new link road is being championed by both LBB and TfL, who have stated that the development of a new link will be crucial to the future development of the Colindale area, unlocking congestion and providing a new corridor for bus services through Colindale.

The initial proposals for the link road

are that it could start at Montrose Avenue in the north/west, traversing Montrose Park and the Colindale hospital site, crossing Colindale Avenue, then linking into Sheaveshill Avenue and Colindeep Lane to the south/east. Although, options for the link road will be developed in more detail in the options phase of the AAP.



Aerodrome Road

Bus Services

Bus routes

There are two main bus routes that run through the action plan area, route 204 and route 303. In addition to these are routes 32, 142 and 292 which run along the Edgware Road boundary of the action plan area. The mobility bus 972 also runs along the Edgware Road boundary, but since there is only one bus a week in either direction, usage of this bus was not analysed. Two night buses operate in the Colindale area – N5 and N16.

Route 204 travels from Sudbury Town station to Edgware station, running through Colindale Avenue and Lanacre Avenue. Route 303 runs from Colindale

Asda along Colindale Avenue and Corner Mead towards Mill Hill Broadway station and terminates at Edgware. Routes 204 and 303 are the only buses to directly serve Colindale station. However, if Colindale is to be promoted as an interchange as the area is developed, this may need to increase.

Route 32 runs from Kilburn Park station through Colindale to Edgware station. Route 142 travels from Brent Cross shopping centre to Edgware station. Route 292 travels runs from Colindale Asda via Edgware station to Borehamwood. Table 5.1 shows typical frequencies on weekdays for these bus services.

Route	First buses	6am to 7am	7am to 7pm	7pm to 10pm	10pm to 1am	Last buses
32	0611/ 0513	About every 8-12 minutes	About every 6-10 minutes	About every 6-12 minutes	About every 10-12 minutes	0105/ 0005
142	0454/ 0525	About every 12 minutes	About every 10-13 minutes	About every 9-20 minutes	About every 30 minutes	0110/ 0111
204	0553/ 0526	About every 10-15 minutes	About every 7-12 minutes	About every 9-15 minutes	About every 12-15 minutes	0053/ 0046
292	0605/ 0556	About every 15-20 minutes	About every 12-15 minutes	About every 13-30 minutes	About every 30 minutes	0015/ 0021
303	0520/ 0536	About every 20-30 minutes	About every 11-15 minutes	About every 11-30 minutes	About every 30 minutes	0000/ 0016

Table 5.1 Weekday bus frequencies

There are some planned changes to the routes running through Colindale. Route 204 will have a new schedule from 15 September 2007 to improve reliability.

Route 142 will have an increased frequency on Sundays, rising from 3 to 4 buses per hour during shopping hours and rising from 2 to 3 buses per hour during the early evenings. Additional school journeys have been partly withdrawn but these have been supplemented by route 642.

Bus loadings and capacity

Average bus loadings for the 5 main routes running through Colindale were obtained from the TfL Bus Origin and Destination Surveys (BODS) data. These surveys were last carried out

between 2001 and 2003 for these bus routes. The data used is that for weekdays. These were broken down by time of day into three periods – the AM peak (0700 – 1000), the inter-peak period (1000 – 1600) and the PM peak (1600 – 1900).

Buses 32, 142, 204 and 292 use double deck buses with a capacity of 92 passengers (67 seated). Bus 303 uses a single deck bus with a maximum capacity of 62 (39 seated).

Figure 5.2 shows the average load of route 204 within the action plan area for each period of the day with the maximum capacity of the bus (solid line) and the maximum seating capacity of the bus (dotted line) marked on the graph.

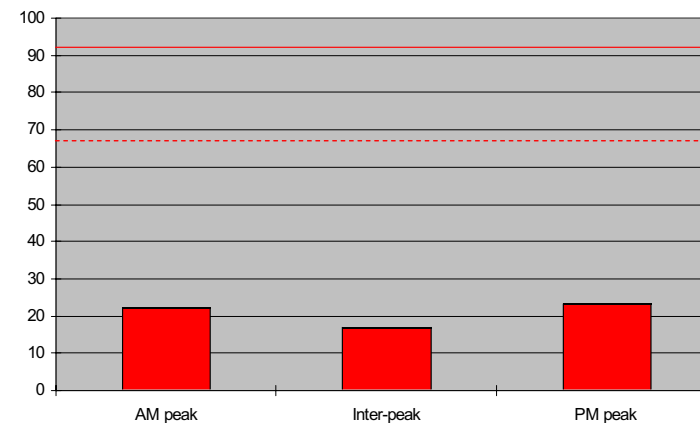


Figure 5.2 Average loads for route 204

As shown in Figure .1, the peaks are busiest periods, with the AM peak having an average load of 22 passengers and the even peak an average load of 23 passengers. This is busier than the inter-peak load which averages at 17 passengers. These are all far below the seating capacity of 67 of the bus used on this route.

Figure 5.3 shows the average load for route 303, also split by time of day and displaying the seating and total capacity of the bus.

The average load throughout the day is approximately 11 passengers, with the average load highest in the inter-peak period. The maximum seating capacity on this bus is 39, so only 27% of seats are being used while the bus is travelling through Colindale.

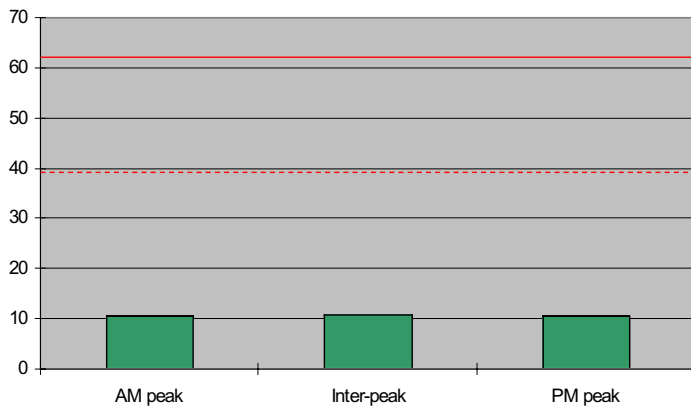


Figure 5.3 Average loads for route 303

Figure 3.4 shows the average load for route 32 within the Colindale area split by period of day.

As can be seen in Figure 3.3, the peak periods are the most busy, with an average load of 24. This is far short of the seating capacity of 67 of the bus used on this route, even during the peak periods.

Figure 5.5 shows the average load of route 142 in the Colindale area.

The busiest period is the AM peak, with an average load of approximately 25 passengers. Again, the bus is operating far below capacity whilst travelling through Colindale.

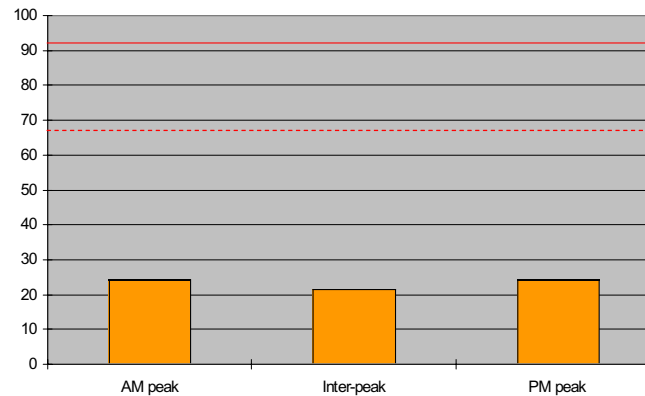


Figure 5.4 Average loads for route 32

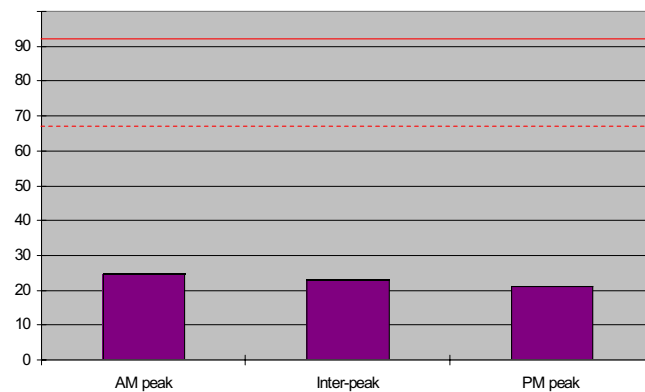


Figure 5.5 Average loads for route 142

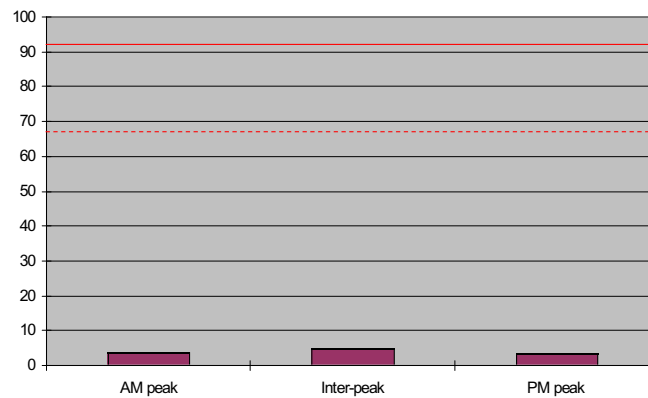


Figure 5.6 Average loads for route 292

Figure 3.5 shows the average load of route 292 in the action plan area.

As can be seen in Figure 5.6, the average loads for route 292 are very low whilst running through Colindale. However, this route starts/terminates at Colindale Asda and so has not travelled far whilst in the Colindale area, which may explain why the loads are so low.

Loading locations

Figure 5.5 shows the main bus routes running through the action plan area with the number of boarders and alighters at each stop in the area and a selection of stops outside the area. The graphs at each stop shows the number of boarders and alighters between 0700 and 1900 on a weekday.

As can be seen from this map, there are a number of particularly busy bus stops with large numbers of passengers boarding and alighting at that stop. These in particular include Colindale station, Burnt Oak station, Quakers Course, Edgware Road/Colindale Avenue and The Bald Faced Stag.

The bus stops shown to the east of the MI are not served by any route running through the Colindale area. These are shown to illustrate the severance caused by the MI between Colindale and Hendon and Mill Hill East.

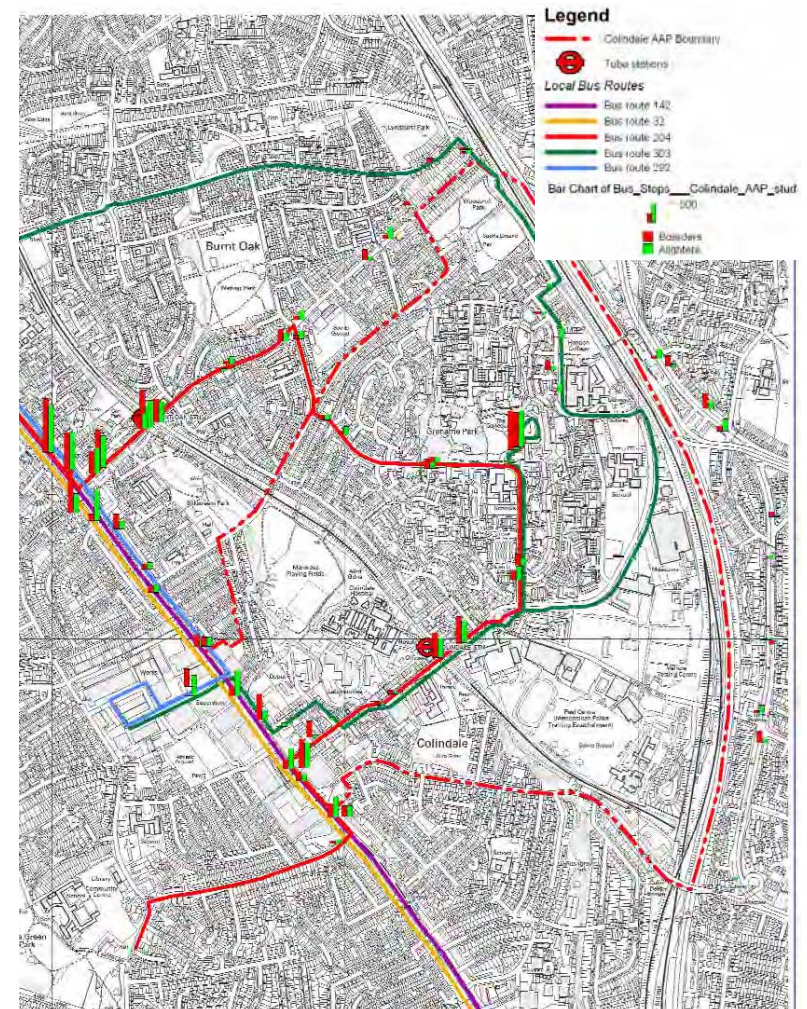


Figure 5.5 bus routes through the AAP study area

Rail

London Underground Network and Services

Colindale London Underground station lies at the heart of the Colindale Area Action Plan.

The station is on the Northern line (Edgware branch) of the London Underground Network.

It is currently served by 20 trains per hour travelling between Edgware and central London. This could rise to 24 trains per hour following upgrades on the line.

Burnt Oak station is just to the north/north-west of the AAP area. This is the next stop north from Colindale station on the Northern line.

Capacity Analysis

Northern line trains currently consist of 6 carriages. This gives an individual train capacity of 796 when using a standing measure of 5 passengers per metre. When London Underground assess line capacity with a normal frequency of service over a period of time, the 4 pass/metre capacity of 686 is used.

Figures 5.6 and 5.7 show the average train load of trains running through Colindale station using TfL Rail Origin and Destination Surveys (RODS) data. The horizontal lines show train capacity, with the red line using 5 pass/metre and the

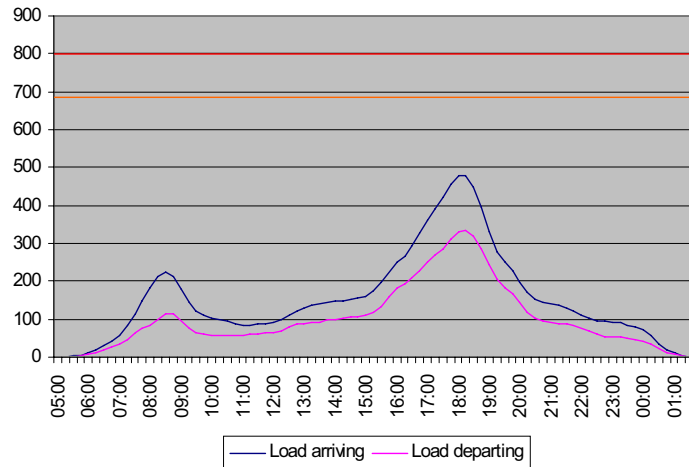


Figure 5.6 Northbound train loads

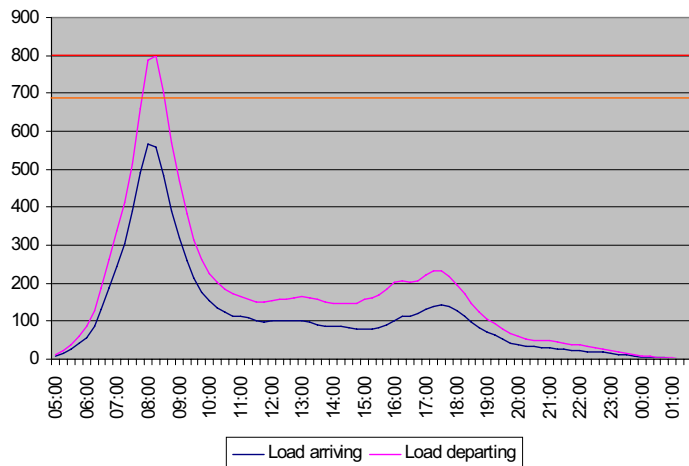


Figure 5.7 Southbound train loads

orange line using 4 pass/metre.

Figures 4.1 and 4.2 give an indication of how busy the trains running through Colindale are throughout the day and provide an idea of the travelling conditions of passengers when travelling by Underground to Colindale.

As can be expected, the main period of overcrowding is the AM peak on trains travelling southbound towards central London. As shown in Figure 4.2, a large number of passengers board the train from Colindale during this time period. There is severe overcrowding on these trains as they depart from Colindale during this period, even without taking into account extra passengers attempting to board the train further down the line. With the development planned for Colindale, this overcrowding will increase unless capacity is increased.

During the PM peak, there is not as much overcrowding as in the AM peak. However, many passengers would have alighted the train before it reaches Colindale so this does not necessarily give a fair reflection of overcrowding. The PM peak has a flatter crest than the AM peak, with those journeying back to Colindale from central London spread out over the PM peak and the evening period.

The total number of passengers using Colindale station over the course of a

weekday is 5,209 passengers.

Figure 5.8 shows the number of passengers using Colindale station throughout the day.

Figure 5.8 shows that busiest periods of use are the AM and PM peaks as mentioned earlier. As there is currently no data on the capacity of Colindale station, we are unable to determine whether there is sufficient capacity to cope with current and future use of the station.

National Rail Services

The nearest National Rail station to the Colindale area is Mill Hill Broadway station.

First Capital Connect trains run from Mill Hill station to King's Cross, London Bridge, St Albans and Gatwick and Luton airports.

On average, 1621 passengers use this station on a weekday. Bus route 303 runs from Colindale to Mill Hill Broadway station which provides an alternative route in and out of London to Colindale station.

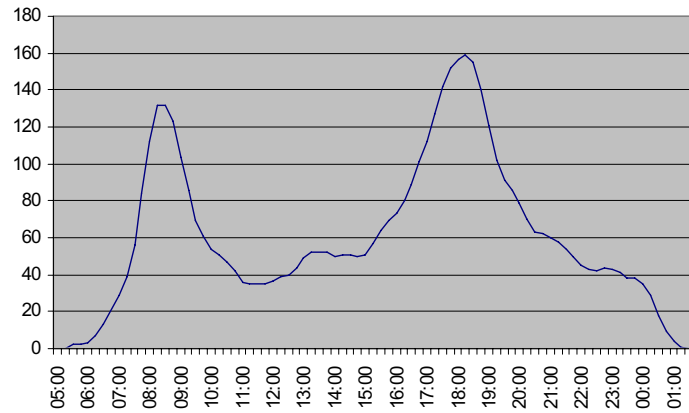


Figure 5.8 Passenger numbers at Colindale station



Colindale Station entrance, Colindale Avenue

Walking and Cycling

The Area Action Plan should address walking and cycling as key modes to promote a sustainable community whereby walking and cycling are modal choices and a real alternative to the private car for journeys over short distances.

This involves ensuring that good standards of design are implemented in new developments to encourage these behavioural traits from the outset, rather than trying to retrofit in walking and cycling infrastructure and behavioural change at a later date.

TfL would like to see a good footway and cycleway network to encourage people to be able to choose walking or cycling as a means of transport. Facilities such as crossings, routes to bus stops, cycle parking and cycle lanes all help with this.

Future provision should be with reference to the TfL documents such as London Cycle Design Standards, Improving Walkability and the London Cycling and Walking Action Plans. In addition adoption of the standards and guidelines proposed in the DfT document 'Inclusive Mobility' for the design of pedestrian facilities will ensure that crossings and footways, etc meet the needs of all pedestrians.

TfL is working to encourage a big increase in walking and cycling in future years (as detailed in the T2025

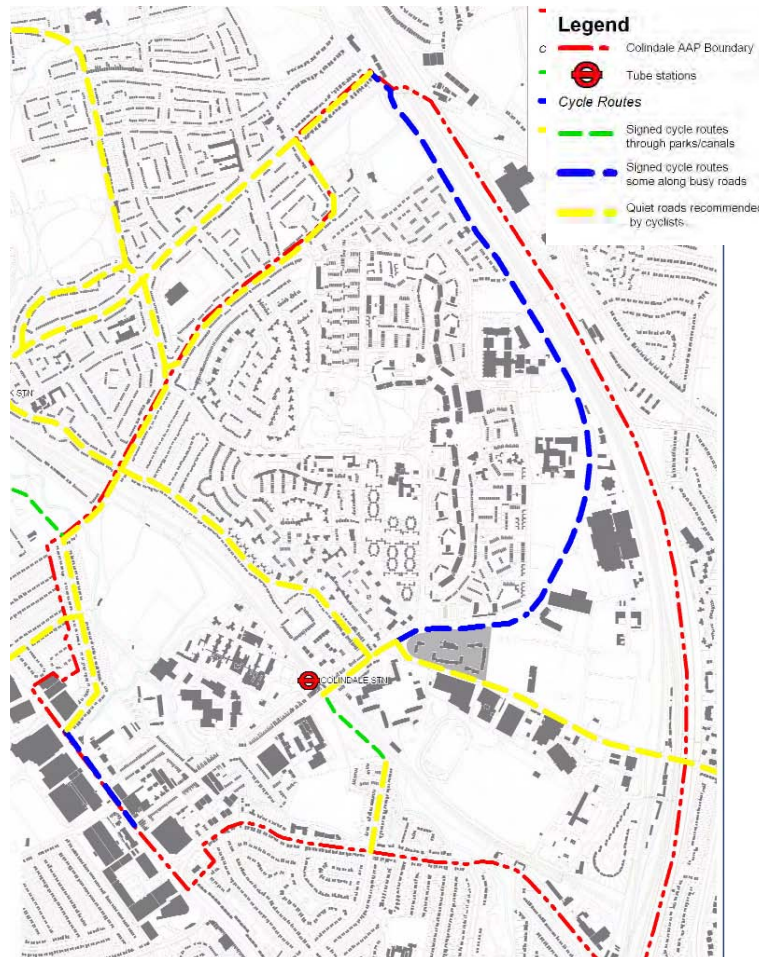


Figure 5.9 Cycle routes in Colindale

document) and so it is vital that the infrastructure is in place to support and meet these targets.

CB understand that no specific studies have been conducted in this area; and furthermore that no studies have been proposed to date either to assess carriageway/footway conditions.



Recreation park opposite Colindale station

Future Development

Development Proposals

A number of developments are planned for Colindale as part of the intensification of the area under the London Plan. Table 5.10 shows a summary of the current proposed developments for the area.

These developments will influence the Area Action Plan as they will increase the demand for transport in the area. Any plans for improving transport in the area should take these developments into account to accurately forecast future demand.

Site	Address	Total Units	Net Increase	Date
Adastral South	Lanacre Avenue	320	220	2002
Grahame Park	Lanacre Avenue	3440	1700	Jan-07
Beaufort Park	Dorchester Gardens	2800	500-600	Apr-05
Colindale Hospital	Colindale Avenue	1000		Early 2008
Barnet College	16 Wood St	300-400		Early 2008
Newspaper Library	Colindale Avenue	500-600		End 2009
Middlesex University student accommodation		500		End 2009
Hendon Police Training College	Aerodrome Rd	2000-3000		
Zenith House	Colindeep Lane	220		
Kidstop	Colindale Avenue	84		Oct-06
Greenpoint	The Greenway	90		Pre-application stage
Brent Works	Colindale Avenue	90		Pre-application stage
A41 Frontage (corner with Aerodrome Road)	Aerodrome Rd	100		Pre-application stage
Kwik Fit	Edgware Road	60		Pre-application stage
Land at St James School	Great Strand	30		2004

Table 5.10 Proposed developments in the Colindale area



Beaufort Park Development, from Aerodrome Road

Conclusions

London Underground services from Colindale Station in the peak periods at present are at or nearing capacity. However, the issue with Colindale is less acute than in other locations on the LU network as it is near the end of the line.

Therefore, morning peak congestion southbound, into central London, is not so much of an issue or constraint, although increased demand at Colindale could lead to problems further down the line. Northbound congestion in the pm peak period is less acute than the morning peak.

The local bus network at present includes four high frequency routes through the study area. None of these routes have significant capacity issues.

It is our view, and that of the local authority, that bus travel will be crucial to catering for future travel demand in Colindale. It will be crucial through the AAP process to identify a bus network which adequately caters for demand, not only in terms of capacity but in terms of coverage and permeability. It may be that certain existing routes could be re-routed or that further additional services could become viable. This will be identified in later stages of the AAP through options identification and testing.

What we would like to ensure is that there is sufficient space for potential

future station enhancements and that there is adequate space reserved for a good quality bus/rail interchange at Colindale station.

Assessment of existing highway conditions will not be possible until we take delivery of the hotspot model and the surveys report which feed into the model development. The proposed Montrose link road is thought to be crucial to the delivery of the growth anticipated for Colindale and hence for the AAP process. This will along with other highway infrastructure schemes improve local accessibility and permeability, which is at present hindered by congestion on the major strategic routes to the east and west, although especially on the A5 to the west.

Ensuring high standards in walking and cycling infrastructure and good levels of permeability throughout the local area, reducing the barriers to walking and cycling will be key to increasing walking and cycling in future years. The AAP will champion up to date TfL and national standards and guidelines for pedestrian and cycle mobility throughout Colindale ensuring that this is the case.



Aerodrome Road/A41 junction

6. Urban design analysis



Introduction

This chapter sets out an urban design analysis of the Colindale study area. It is structured around the following issues:

Linkages

Connections, open spaces and public realm character areas

Activity and frontage

Legibility, topography and townscape

Opportunities overview

Current proposals



Linkage, Connections, Open Spaces and Public Realm

Current Issues

Colindale has a poor urban structure, with most areas accessible through convoluted routes, exposed backs and incoherent developments.

Much of the public realm has no direct frontages or active ground floors.

Many routes are structurally not pedestrian friendly and as a consequence, pedestrian movement is quite limited.

There is no public area or open space with distinctive quality and the public realm is often inadequate: poorly maintained, not well linked, undistinguished and as a consequence poorly used.

Aims and objectives

Colindale aims to be a high quality, attractive and safe urban environment.

To improve navigation through Colindale through the establishment of focal points.

To establish a network of green corridors.

To establish a more extensive network of links between key nodes and reduce the size of urban blocks.



figure 6.1 linkages, connections, open spaces and public realm

Character Areas

Building typologies

Figure 6.2 represents a snapshot of the current land uses on the site many of which are currently undergoing change.

Residential building typologies

1. Large detached houses: set in mature landscaped areas, these dwellings have large front and back gardens.

2 Grahame Park Estate: Based upon Radburn principles of separating pedestrians and cars, this development dominates Colindale. A high density spine creates a pedestrian corridor that leads to a shopping precinct.

3 Other housing typologies: scale and massing reflect a more traditional design approach than the adjacent Grahame Park Estate. The layout of isolated blocks, clusters and cul-de-sacs has reduced the continuity of frontage onto the street and the sense of enclosure.

4 Adastral South development: new housing attempts to address the above issues by establishing streets with dwelling forming continuous and formal frontages.

The remaining areas on the site are characterised by semi detached houses which front onto the street.

Non-residential building typologies

The non residential areas are characterised by a lack of positive street presence. Buildings including the Peel Centre, the National Blood Service Building and Barnet College project no

coherent image, and are poor quality isolated buildings often set in a sea of car parking.

There are four sites within the area which contain listed buildings:

- The Colindale Hospital Administration Building;
- The Control Tower and ancillary buildings on RAF East Camp although these are likely to be relocated;
- The Officers Mess, now student accommodation for the Middlesex University Halls of Residence;
- The Hangar and other Salvaged RAF buildings of historic interest at the RAF Museum.

-  Site boundary
-  Character areas
-  Residential areas
-  Education and training
-  Community facilities
-  Green areas
-  Commercial mixed use
-  Retail
-  Residential (under construction)

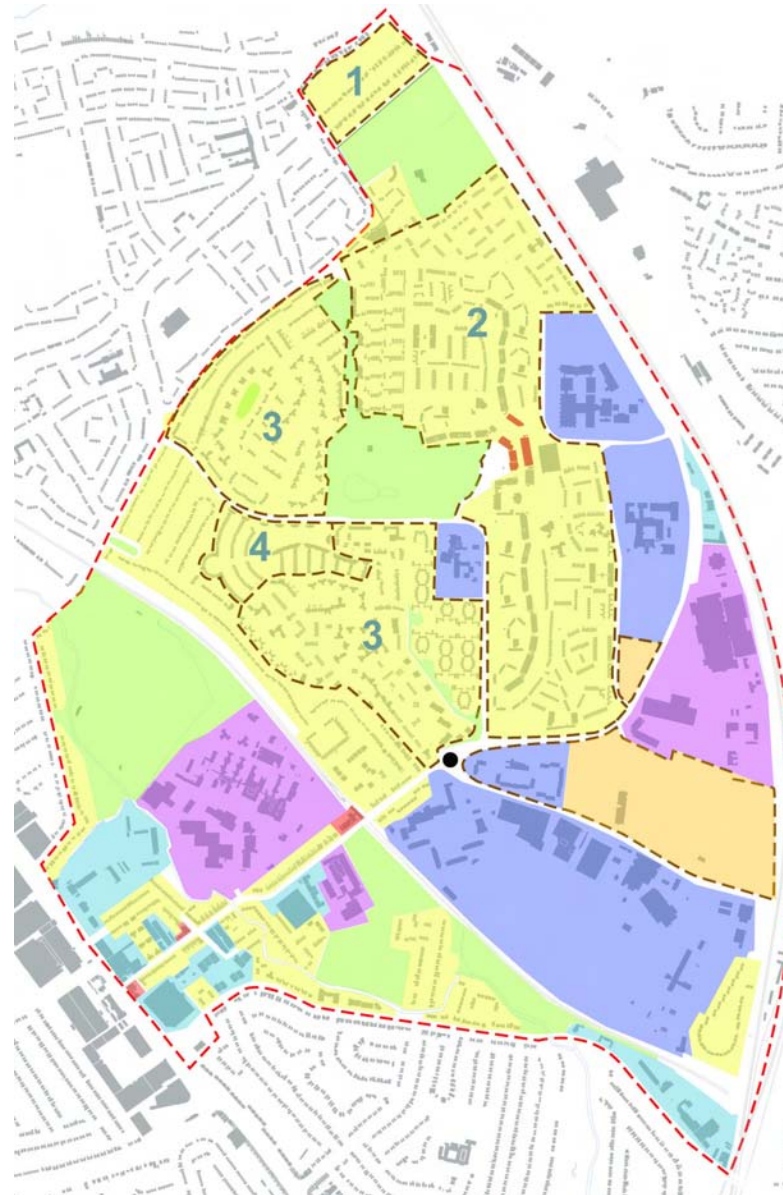


figure 6.2 character areas within Colindale

Activity and Frontage



Figure 6.4. existing active frontages



Figure 6.5 current proposals for active/passive frontages









Figure 6.6 potential active/passive frontages

There is very little active frontage currently within the Colindale AAP area.

The current active frontage is limited to:

- along the Edgware Road at the junction with Colindale Road;
- the Spar, Citizens Advice Bureau, a number of independent newsagents within Grahame Park Estate, a Chinese takeaway and a derelict pub.
- The entrance to the RAF museum presents a public façade although it is set back from the road and provides little for residents within the area in terms of local amenity.
- The current masterplan proposals at various stages of development on the site do little to set up a particularly clear layout of routes and frontage through the whole site.
- Potential proposals for the site could unite the current masterplans to give definition to the routes and frontages through the site to make the links into and around the site attractive and active.

-  Site boundary
-  Current attractive/passive frontage proposals
-  Potential active/passive frontage proposals
-  Current Buildings
-  Areas of high footfall
-  Current areas of active frontage

Legibility, Topography and Townscape

Topographical features and landscape

Colindale is located within strong physical boundaries; to the east lies the end of the M1 as it approaches London, and a high speed train line into the city; to the south west lies the Edgware Road which is the main bus corridor to central London and provides the main retail focus for the area.

The topography is generally fairly flat rising up to the north east and south west, and there are few prominent landmarks to locate people within the area.

The Silk Stream, a small tributary of the River Brent which runs from the north west to the south east of the site.

There are tall blocks within the current Grahame Park Estate, and new, taller blocks are currently under construction. There are tall buildings also on the Metropolitan Police Headquarters visible from the railway line and motorway bounding the site.

Local Landmarks and Townscape Features

Key landmarks and features in Colindale include:

- the roundabout at the junction of Aerodrome Road and Colindale Avenue;

- The Metropolitan Police Headquarters on the RAF museum, one of the major visitor attractions in North London off Grahame Park Way;

- The British Library Newspaper Archive opposite the entrance to the Colindale Underground stop on Colindale Avenue;

- The hospital and National Blood Service building off Colindale Avenue;

- The various public, private and industrial buildings along the Edgware Road; and

- The Middlesex University Buildings along Grahame Park Way.

-  Existing green space
-  Key landmarks
-  Key views
-  Key Routes



figure 6.7 Colindale's key topographical features, landmarks, views and routes

Opportunities overview

Figure 6.8 provides a summary of the urban design issues which the analysis has identified for Colindale, highlighting key sites and bringing together the key routes through the area.

The diagram highlights green spaces and key buildings. The main public areas including principal access points as represented in blue are key areas where active frontage can provide commercial and retail focal points.

Vehicular entry into the site should be improved including the establishment of a clear road hierarchy and traffic management.

The provision and extension of open space and green corridors is highly recommended to create a range of good quality open spaces helping to reinforce linking between sites.

Features of interest including listed buildings should be used in development to encourage a sense of identity to Colindale.



figure 6.8 key urban design opportunities in the Colindale AAP study area

Current Proposals

Current proposals for the site

Figure 6.9 shows the various current proposals for the site including the Beaufort Park developments, the new Grahame Park scheme, the now built Adastral development and various other developments to the south of the site.



figure 6.9 current proposals for the Colindale AAP area

7. Property market review



Background

This chapter sets out a review of the property market in Colindale, prepared by Donaldsons/DTZ.

Colindale is facing significant change and has been identified as one of three “key strategic opportunity” areas earmarked for sustainable high quality growth in the London Borough of Barnet’s Three Strands Strategy and emerging Local Development Strategy.

The existing study area lacks cohesiveness but is, however, well served by public transport. Colindale is located on the west side of the London Borough of Barnet in North West London. The study area is located approximately 13 km (8 miles) to the North West of Central London. The study area is surrounded by Edgware to the north, Hendon one mile to the east, Brent Cross a mile and a half to the south east and Finchley approximately two miles to the west.

The area benefits from an established transport infrastructure with Colindale underground station providing regular Northern Line services to central London to the South East and Edgware to the North. There are also a number of bus routes which serve the area. The M1 runs along the eastern boundary of the study area and the Northern Circular Road runs along the southern boundary. The A5 road runs along the western edge of the study area.

Historically the Colindale area was developed as an industrial destination, as businesses looked to locate factories there especially after the First World War. However, as transport links to the area improved land prices increased and factory expansion was not feasible. The area therefore became largely residential, but there are also a number of ancillary institutional, business and educational uses.

Key land uses

Colindale is dominated by one of Barnet’s largest social housing estates, the Grahame Park Estate. The Grahame Park Estate was built in the 1960s and 1970s by the Greater London Council on a former aerodrome site. The estate was expanded through a number of phases of development however each additional phase resulted in poor integration and linkages with the existing uses. It is now an internalised development, which has a negative image and limited diversity of use.

By contrast the surrounding Barnet area is relatively prosperous. As described in detail in the property market analysis section below, residential prices in the area are forecast to increase steadily, and the area is the focus of attention in terms of developments which will help Barnet to meet its housing target aspirations. Additionally, developments around the Grahame Park estate are starting to

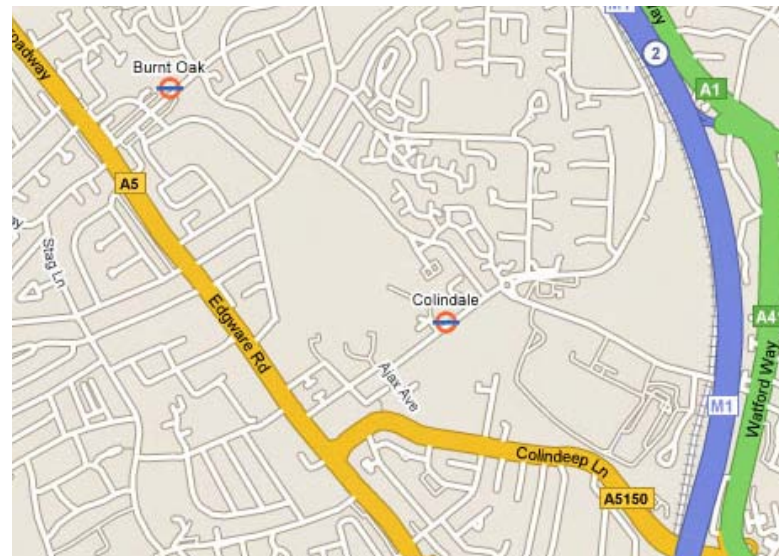
create a more balanced community in the area.

Educational and institutional uses in the area include Barnet College, the now vacant Colindale Hospital, St James’ High School, The RAF Museum, The Regional Police Headquarters, (the Peel Centre) and, although residential in use, Middlesex University’s Halls of residence which has 90 self contained flats and 540 bedrooms. The RAF Museum in particular is an important visitor attraction, and consists of five exhibition halls on a large site.

Employment uses include a small

number of industrial units on the eastern edge of the residential area. Occupiers at these units include Travis Perkins and local businesses. The main employment uses are located to the west of the main residential area between Colindale station and Edgware Road. These include the National Blood Bank, the British Library Newspaper Archive and the Colindale Business Centre.

The Mayor’s London Plan published in February 2004 identifies Colindale as a “Strategic Area” for Intensification within the North London Sub-region, with the potential to accommodate



Colindale AAP study-area boundaries: Edgware Road and the M1

2,000 new homes, 500 new jobs and an ambition to maximise employment and high quality sustainable development.

The London Plan and Sub-Regional Development Framework (SRDF – 2006) for North London identifies that development in Colindale would be primarily for new housing with a mix of uses to provide local employment and services.

As part of the current review of the London Plan, it is proposed that Colindale will be re-designated as an “Opportunity Area”. A Greater London Authority led capacity study indicates that the area has the potential to deliver over 10,000 new homes and 500 new jobs, reflecting the strategic importance of the area.



Aerodrome Road

Property Market Review

The starting point with regards to our property market analysis is an assessment of the current provision within the Borough, with specific reference to Colindale. It is equally important to consider the national and regional market trends and likely demand from each property market sector; this will inform the likely developer and investor interest in a given area. The following commercial market review therefore considers on a sector by sector basis, the current provision of accommodation within the area, identifies likely requirements based upon current market knowledge and likely future market trends which may impact upon any development proposals within the Borough and, more specifically, Colindale.

National Context and London Overview

Demand for housing in the London area strengthened appreciably during the beginning of 2007, supported by a number of special factors including large bonus payments related to the performance of the financial sector, purchases by foreign nationals and strong inward migration. House price growth in the capital has risen to around 9% from 2% a year ago and, following four years of slower house growth than the rest of the country, it is now stronger than in any other English region. All the factors which supported the

market in 2006 looked likely to remain strong for 2007. House price growth in London, is, as expected, outstripping that of the rest of the country in 2007 as many of the capital's bankers invest their bonuses in bricks and mortar. Strong market demand coupled with competition for very short supply of the right type of property has assisted in fuelling further house price rises within the Capital. It has been forecast that there will be a 7% growth in the UK residential market during the course of 2007 and a 15% growth in prime central London locations.

A strong economic climate continued to encourage the housing market in the early months of 2007 with rising unemployment doing little to discourage the consumer with completed sales up significantly based upon year on year analysis. That said, interest rate rises are now starting to cool the market as higher fixed rate mortgages are now begin to have an impact.

Further, an expanded private rented sector has stabilised the housing market and increased economic stability though increased labour mobility. Interestingly, the expansion of the City has been reflected in the increased demand for rental property in residential areas close to the City and Docklands office markets. On a more general note, the private rented sector has also provided

accommodation for many of the 600,000 new immigrants that arrived into the UK in 2005. London has accounted for between 35% and 45% of registrations of new migrants in the UK in recent years. In 2005-2006 this amounted to 235,600, equivalent to nearly 13% of the population aged 16 and over. London's disproportionately high share of new migrants is likely to continue and if net migration remains at the high levels of recent years the demand for housing will remain strong relative to the available supply.

Such strong sources of demand seem likely to continue to support both the middle-to-upper end of the home owner market and the private rented sector. Buy-to-let mortgage activity has been particularly strong; the growth in the number of private rented sector properties in London has been faster than the growth in owner occupied properties in recent years. The pace of growth will almost certainly accelerate throughout 2007 and it is possible that in net terms, properties will move from the owner-occupied sector to the private rented sector.



New development on the A41

London Borough – Average House Price Change 2006 - 2007

For comparative purposes the table opposite identifies the average house price change over the last 12 months from March 2006 to March 2007 across all London Boroughs. In comparison to other London Boroughs, Barnet has witnessed average growth at 17%, although this represents a significant improvement on the previous year where nominal growth was witnessed.

Borough	Average House Price - £ 2006*	Average House Price - £ 2007*	% Change 2006-2007*
Haringey	268,395	356,430	33%
Hammersmith and Fulham	394,923	500,769	27%
Lambeth	267,248	333,126	25%
Wandsworth	356,751	436,007	22%
Southwark	258,632	312,739	21%
Merton	277,498	336,435	21%
Hounslow	270,565	326,684	21%
Enfield	229,875	279,177	21%
Tower Hamlets	261,032	312,282	20%
Hackney	265,049	319,279	20%
Brent	264,010	315,204	19%
Ealing	279,244	328,143	18%
Richmond upon Thames	422,150	494,596	17%
Lewisham	212,700	248,442	17%
Kingston upon Thames	288,467	336,786	17%
Kensington and Chelsea	615,361	719,628	17%
Barnet	329,207	384,768	17%
Hillingdon	233,420	266,704	14%
Greenwich	222,663	254,321	14%
Camden	444,507	505,658	14%
Waltham Forest	210,152	236,232	12%
Newham	190,209	212,210	12%
Croydon	214,575	240,035	12%
Redbridge	245,804	273,420	11%
Bromley	269,487	298,312	11%
Sutton	231,201	253,972	10%
Harrow	292,222	319,496	9%
Bexley	197,369	214,744	9%
Westminster	508,386	544,972	7%
Havering	219,620	235,548	7%
Barking and Dagenham	171,016	181,276	6%

Figure 7.1 house prices across the London boroughs - source: HBOS

Note - Prices shown in the tables below are arithmetic average prices of houses on which an offer of mortgage has been granted. These prices are not standardised and therefore can be affected by changes in the sample from quarter to quarter. Figures include properties sold for £1 million plus.

Barnet Overview

Barnet offers a very attractive location within North London due to its close proximity to Central London, and access to the principal commercial centres of North London and vehicular access to North London's main arterial road networks. As such Barnet has witnessed significant year on year capital growth in excess of UK averages as detailed within chart 7.2.

Interpreting the above into average residential values, the table identifies the significant increases within Barnet over the last 15 years from the low base in the early 1990's following the recession, to steady and continued increases over the latter part of the 1990's and into the 2000's and continued increases during 2007 following a levelling off period during 2005 - 2006. Figure 7.3 charts year on year growth within the Barnet area.

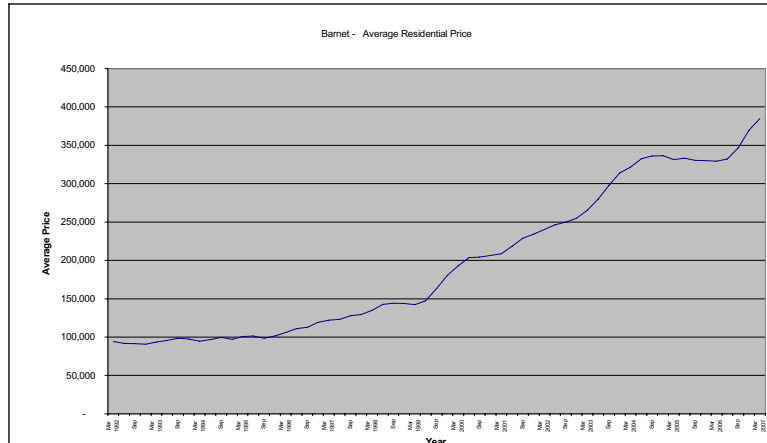


Figure 7.2 average residential price across (HBOS)

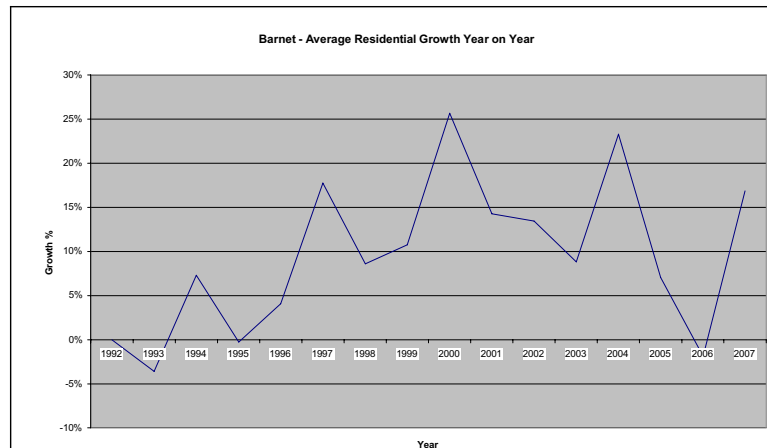


Figure 7.3 average residential price across Barnet (HBOS)



Colindale Avenue

The Development Pipeline

The development pipeline within the Colindale area of Barnet has been very active over recent years, with this trend set to continue with a number of major developments planned. The housing market within the area will therefore be influenced considerably within the next five – ten years with the delivery of a large amount of new residential accommodation. Effectively the quantity of housing has the potential to create a micro-market where housing values could differ from the national market trend. Equally, developer expectations need to be managed. Figure 7.4 outlines both recently completed developments and the future development pipeline.

The London Plan and Sub Regional Development Framework for North London identify Colindale as an area for intensification in terms of residential provision. It is proposed that development would be for new housing with a mix of uses to provide local employment and surfacing. As part of the current review of the London Plan, it is proposed that Colindale will be re-designated as an Opportunity Area with the potential to deliver over 10,000 new homes and 1,000 new jobs. The mixed use nature of the largest developments outlined above could yield the 1,000 jobs referred to above. In particular, the majority of these jobs could come from the 20,000 sq m of retail accommodation.

Site	Number of units	Planning Status	Additional Comments
Adastral South	320 in total (net increase of 220)	Detailed approval 2002	Development by Bellway Homes and Notting Hill Housing Trust. Complete and fully occupied.
Grahame Park	3,440 in total	Outline approval January 2007	Development commenced on site, by Choices for Grahame Park – Genesis Housing Group/Countryside Properties. 10,000 sq m of commercial/community uses.
Beaufort Park	2,800 units	Outline approval April 2005. Detailed approval given for roughly 1,700 units	250 nearing completion. Development by St George. 8,000 sq m of commercial use. 500- 600 additional units and 3,000 sq m of commercial uses anticipated.
Colindale Hospital	Approximately 1,000 units	Outline application expected early 2008	Developer Fairview New Homes.
Barnet College	Approximately 300-400 units	Outline application expected early 2008	Developer Fairview New Homes.
Newspaper Library	Approximately 500-600 units	Outline application expected end 2009	
Middlesex University Student accommodation	Approximately 500 units	Outline application expected end 2009	1,000 student rooms. Will form a new student village.
Hendon Police Training College	Approximately 2,000-3,000 units		

Figure 7.4 developments planned for Colindale

Target market

While there is a need to maximise development value, not only to meet developers' profit expectations, but also to maximise wider planning obligations, the influx of significant numbers of flats to the market place for both private and affordable accommodation needs to be balanced by a level of family housing / maisonettes. There needs to be "follow on" space, not just one and two bedroom flats. Creating a development of small units does not significantly cater to the family markets. This is important as clearly developers will be looking to maximise profit and as such, planning for any future development needs to be robust in assessing the appropriate development type / mix for a given site and the contributions therefrom in terms of planning obligations.

Further, the level of residential provision needs to be considered in the context of the social and economic infrastructure which will be needed to support such a level of new housing. For example, education, health, employment and retail facilities all need to be considered to meet the wider demands on society of prospective occupiers. Subject to the appropriate infrastructure, the development in and around Colindale could offer suitable residential accommodation for a broad range of people at differing stages, for example singles/ couples, family

orientated accommodation, through to larger family housing and retirement accommodation. Given the anticipated sales values within the area, as commented upon later, the opportunity exists for a high level of owner occupiers.

Equally, it is inevitable, based upon the current climate of the residential market, that developers would envisage a strong level of interest from investors seeking second properties / adding to existing portfolios. Clearly, as with other major developments, the introduction of foreign investment alongside that of nationals will play a key part in sustaining sales levels. In particular, buy-to-let mortgage activity has been particularly strong in recent years, the growth in the number of private rented sector properties in London has been faster than the growth in owner occupied properties in recent years. The pace of growth will almost certainly accelerate over the course of 2007 and beyond, and it is possible that in net terms, properties will move from the owner-occupied sector to the private rented sector. This will create a significant rental market in the area, again necessitating a cross section of property types and sizes to accommodate potential supply. Interestingly, London's disproportionately high share of new migrants is likely to continue and if net migration remains at the high levels of recent years the demand for housing in

the capital will remain strong relative to the available supply.

Market mix / unit sizes

Given the above comments regarding target markets, we would anticipate that new private accommodation will provide a range of modern flats, houses and town houses to meet aspirations for a mixed and integrated community.

We would anticipate that a developer would seek a private market led approach to the size of the private units and the numbers of each specific type of unit to ensure a large cross section of accommodation can be targeted to a wide target market to attract and maintain demand levels and sales rates.

With regard to affordable housing, it is acknowledged that any Social Rented and Shared Ownership unit sizes will need to be in accordance with Housing Corporation size guidance. This is one of the pre-requisites to securing grant funding should this be available. It is likely that affordable Social Rented units will provide a significant proportion of larger family sized units. This is in line with current advice coming from the Housing Corporation suggesting only schemes which offer social rented as two bedroom and larger accommodation will be seriously considered for grant funding. In this respect we would anticipate that no

Site	Number of units	Planning Status	Additional Comments
Zenith House	220 units	Detailed approval subject to no direction from Mayor	Genesis Housing Group. With commercial use.
Kidstop (former National Grid Site)	84 units	Detailed approval October 2006	Development commenced on site. Developer is Barratt Homes.
Greenpoint	90 units	Pre application stage	Commercial uses to be included.
Brent Works	90 units	Pre application stage	Site located opposite Colindale Hospital. Fairview New Homes.
A41 Frontage	Approximately 90 units	Pre application stage	Site located on corner with Aerodrome Road. With commercial floorspace.
Kwik Fit	Approximately 60 units	Pre application stage	A5 adjacent to Kidstop site.
Land at St James School	30 units	Detailed approval 2004	Development nearing completion.

Table 7.5 developments planned for Colindale (continued)

studio and minimal one bedroom units will be provided as social rented accommodation. Typically the social rented accommodation would be in the form of two and three bed flats and three, four and five bedroom houses.

Delivery rates

Given the scale of the proposed development within the area it is highly likely that the development will be released as a number of phases by landowners / developers. In a competitive market place, as will be evident based upon the scale of development envisaged, developers will

be keen to unlock value from sites and achieve ambitious sales rates. The need to secure sales in an optimum timescale needs to be balanced against the number and level of incentives required to achieve such sales as opposed to the retention of empty units post completion. Equally, differentiation in product type and offer will be important to sustain sales rates and uphold sales values.

Through consideration of the likely rate of sales for flats within the proposed development, we would anticipate a private dwelling take up rate of 8 – 10 units per month if averaged over the

whole life of the development programme (and being inclusive of pre-sales and units sold off plan). We would not envisage a significant period of time post completion of the development to complete all sales.

With regards to affordable housing, to ensure certainty of delivery, we would anticipate that the Council will request, as a minimum, that the affordable accommodation will be delivered in parallel with the private accommodation and handed-over on completion of each block / phase, as appropriate.

Values

Residential sales values vary significantly within the Colindale area of Barnet depending on location and style of accommodation. The significant amount of new build residential accommodation coming to the market in the vicinity of the study area has assisted in lifting the benchmark for residential values in the area. This is set to increase further as the wider regenerative benefits of neighbouring developments ripple across the area to assist in attracting investors and occupiers from higher demographic profiles to the area. A summary of the residential sales values within several of the key schemes in the area are provided below:

The most significant residential development which is currently being

undertaken in the study area is on the former RAF East Camp site. This scheme, called Beaufort Park, is located on Grahame Park Way. The developer is St George and upon completion there will be ancillary retail use. A considerable 1,960 private units are planned, with final completion of the development planned for August 2015. Over 200 units have been sold so far since the beginning of the marketing campaign in July 2005. Average values are £4,515 per sq m (£423 per sq ft) and £244,000 per unit. Minimum values are £3,562 per sq m (£331 per sq ft) and £130,000 per unit and maximum values are £6,113 per sq m (£568 per sq ft) and £545,000 per unit. It should be noted that the values per sq ft listed above are inflated relative to more typically sized flats in the area. (The flats at this development are smaller than average and smaller flats generate higher values per sq ft). We understand that outline planning permission has been granted for the provision of 8,000 sq m (86,100 sq ft) of non residential space, and that a further 3,000 sq m (32,300 sq ft) is planned as part of this scheme. (Source- London Residential Research)

Another development in the study area which was completed recently is Salisbury Mews, and is located on Ajax Avenue in the study area. This scheme was developed by Martin Grant Homes and was completed in September 2006. All ten of the units built were sold

within three months of the start of the marketing period. Average values are £280,000 per unit, minimum values are £250,000 per unit and maximum values are £300,000 per unit. (Source- London Residential Research)

New Hendon Village is a scheme which is located in the vicinity of Beaufort Park. So far, this development has 16 units which have been developed by Countryside Properties, but there are plans to develop more if further planning consents are granted. We are informed that demand for these units has been strong and that the majority of occupiers are young first time buyers. Prices for 1 bed flats at this scheme are in the range of £190,000- £210,000, equating to a value of £4,197 per sq m (£390- £410 per sq ft). Prices for 2 bed flats are £225,000- £240,000, equating to a value of £4,090- £4,305 per sq m (£380- £400 per sq ft). As with the development at Beaufort Park, flats at this development are smaller than average, and therefore reflect high values on a price per sq ft basis. (Source- Estate Agents)

In conducting an analysis of the Colindale area, it is also useful to look at the area of Barnet which is immediately to the east of the study area and slightly east of the M1. This provides an indication of the values in the broader Barnet area which might be achievable with improved links under the M1, and if the image of the area can be enhanced.

At 22 The Grove, which is located 500m east of the study area on the east side of the M1, David Ambrose Homes has constructed a scheme which consists of 14 private units. These have all been sold. Average values here are £3,993 per sq m (£371 per sq ft) and £393,000 per unit. Minimum values are £3,627 per sq m (£337 per sq ft) and £300,000 per unit and maximum values are £4,273 per sq m (£397 per sq ft) and £550,000 per unit. (Source- London Residential Research)

At Baxendale Court, which is also located 500m east of the study area to the east of the M1, Linden Homes has completed a development of 12 private units which have all been sold. Average values at this development are £388,000 per unit, minimum values are £335,000 per unit and maximum values are £460,000 per unit. (Source- London Residential Research)

The above examples highlight the range of residential accommodation coming forward to the market at present and the range of sales values likely to be achievable, based upon different product types.

National trends

The retail market is in a relatively stable condition with the British Retail Consortium confirming retail sales for July 2007 growing by 1.2%, although the wet summer has influenced a general slowing in spending. However, forecasts indicate modest sales growth levels with pricing competition between the online market and the High Street. In particular, internet shopping is affecting the music and book industry, and £4.47bn worth of goods was purchased online in April, which represented a rise of 55% over the same period in 2006.

In terms of High Street Shops, the total return on a 6 month annualised basis at the end of the first quarter of this year was 10%, representing a 10% fall in return over the course of the year preceding March this year. However, this trend is tempered with a sense of relief that the unsustainable pace of sector value growth has abated and with consistent rental growth prospects, which indicate that the market will become increasingly driven by occupational requirements for the next couple of years. Rental value growth for High Street Shops at the end of the first quarter of this year was above the average for the last two years at 2.9%.

From the perspective of retail sector property performance, commentators predict rental value growth over the next two years to be sluggish at 1-3%,

although fashion retail parks are likely to see much stronger rental value growth. In terms of total returns, the retail sector is likely to be the poorest performer of the main property sectors over the next two years.

From an occupier / investor perspective, it is important to understand how the retail and leisure markets are changing, adapting and diversifying to suit consumer needs. Our understanding of the marketplace recognises the following trends:

- There increasingly exists more of a cross over between retail, leisure and cultural activities within town centres.
- Expenditure on leisure activities continues to increase coupled with an increasingly mobile and active population base.
- Shopping is becoming more of a leisure activity with more genuine mixed use schemes being developed in town and city centres to provide a wide range of facilities and to encourage dwell time within high quality urban environments.
- Occupiers and investors are increasingly willing to accept genuine mixed use developments, to include town centre residential, offices and leisure uses (to include bars / restaurants / cinemas) together with retail.
- It is important to consider other market sectors, assessing current trends and future potential. This is particularly

prevalent with the move towards sustainable, mixed use, developments within town centres.



Colindale Avenue

Regional context

Clearly the overall national trends, as identified above, are more compatible with the principal retailing locations / destinations within the Borough, such as Brent Cross, a 79,000 sq m (850,349 sq ft) regional shopping centre and major town centres such as Chipping Barnet, North Finchley and Edgware.

Retail competition in the region around Colindale is fierce with competing retail destinations (both High Street and in the form of purpose built shopping centres) in the rest of the Barnet area, Watford, St Albans, Harrow, Uxbridge and Central London. Colindale is also situated in a region of London where there is strong out of centre competition.

The most significant shopping centres that have the potential to attract Colindale's population include those listed in figure 7.6 (opposite).

In terms of the development pipeline for out of town shopping centres there is a considerable amount of development planned in the region. The most significant scheme is the proposed extension of Brent Cross Shopping Centre. We understand that a planning application to provide 592,000 sq ft of net additional floor space will be made later this year. Proposals are also currently being advanced for the extension of the Broadwalk Centre in Edgware. This possible scheme includes

Shopping Centre	Floor Area (sq ft)	Approximate distance from Colindale in km
Harlequin Shopping Centre, Watford	725,000	9.5
Brent Cross Shopping Centre, Hendon	880,000	1.5
Broadwalk Shopping Centre, Edgware	208,000	1.5

Figure 7.6 shopping centres in North London

Retail Park	Floor Area (sq ft)	Use classification and Key Tenants
Brent South Retail Park	90,000	Open A1. Sportsworld, TK Maxx, Borders, DFS, Next
Hyde Retail Park	130,000	Bulky Goods. Carpetright, Dreams, Harveys, MFI, Paul Simon
Pentavia Retail Park	96,000	Argos Extra, Comet, Homebase, TGI Fridays
Borehamwood Shopping Park	213,500	Open A1. Argos, Halfords, JJB Sports, Next, Sportsworld
Waterfields Shopping Park	80,000	Open A1. Boots, Borders, Sports Soccer

Figure 7.7 retail parks in North London

the provision of 130,000 sq ft of additional retail floorspace and residential accommodation.

In terms of retail warehousing, there is strong provision in the Borough of Barnet, and also within close proximity to Colindale. There are limited opportunities for further provision of such accommodation within Colindale due to planning policy, limited land availability, visibility and likely access difficulties. Significant retail parks that have the potential to attract Colindale's population include those shown in figure 7.7.

In addition to the above, it should be recognised that the Borough provides a number of smaller town centres and district and local centres, many of which are important from a strategic / economic property perspective. Setting this diverse range of centres into context, the table below identifies the retail hierarchy in the Borough, as detailed in the Barnet Unitary Development Plan (Revised Deposit 2001) - figure 7.8 (over page).

The Hyde (along the A5) is recognised as a local town centre providing a supporting role to the larger centres across the Borough. The existing retailing provision within the Grahame Park Estate is also identified as a local neighbourhood centre in addition to further, localised retailing throughout the area, in particular situated along

Description	Location	
Regional shopping centre	Brent Cross	
Major town centres	Chipping Barnet North Finchley	Edgware
District town centres	Brent Street Church End Finchley East Finchley Temple Fortune Burnt Oak	Cricklewood Golders Green New Barnet Whetstone Mill Hill
Local town centres	Childs Hill East Barnet Hendon Central West Hendon	Colindale - The Hyde Friern Barnet Market Place
Local Neighbourhood Centre	Apex Corner Deansbrook Road Grahame Park Hampden Square New Southgate	Colney Hatch Lane Golders Green Road Hale Lane Holders Hill Circus Great North Road

Figure 7.8 retail hierarchy around North London

Edgware Road (A5) and Colindale Avenue.

The Hyde, which comprises a double parade of units either side of the Edgware Road, provides the principal retailing location within Colindale. The Hyde predominantly comprises secondary / tertiary retail accommodation and is mainly focused towards local independent retailers, although there are a small number of national and regional tenants to provide a diverse mix of uses appropriate for its status as a local town centre with an

ability to benefit from passing trade. Encouragingly, the centre has a relatively low number of vacancies, although due to the configuration and land availability, there is little prospect of any further, significant development at this location.

The Grahame Park Estate Centre, within Colindale, is recognised as a neighbourhood centre, which provides an important economic and social function for the community. The centre, which comprises 2,352 sq m (25,317 sq ft) of retail floorspace, provides a number of uses including a grocers,

chemist, newsagents, telephone shop, baker, hairdresser, bookmakers, public house and a post office. Furthermore, the provision of approximately 10,000 sq m (107,650 sq ft) of non residential space is planned as part of the outline planning permission for the development of 3,440 residential units on the estate.

Retail accommodation to support the significant residential proposals for the study area is also planned as part of the Beaufort Park development. Outline planning permission has been granted for the provision of 8,000 sq m (86,100 sq ft) of retail space at this scheme, and there are plans to provide a further 3,000 sq m (32,300 sq ft). Agents marketing these units inform us that 7,850 sq m (84,500 sq ft) of space is on the market. We are informed that they are in advanced discussions with a mixture of occupiers for this accommodation. These parties include restaurant/bar operators and an A2 occupier, and they are also in talks with a major supermarket chain to operate a small format supermarket. The space is being marketed for rental rates equating to £25 per sq ft on a leasehold basis and at £300 per sq ft on a long leasehold basis. Freehold interests in these units are not available.

It is clearly encouraging therefore that there are proposals to redevelop the Estate comprehensively to provide a mix of residential accommodation and

supporting retail and community accommodation. There will clearly be a level of demand for food store and neighbourhood facilities in the future and it is important that the accommodation provided is appropriate and sustainable to support the anticipated population growth in the area.

Leisure Market

A3 / Public House / Restaurant Market

In terms of the national public houses industry, the sector has been performing strongly recently despite the significant challenges presented through new licensing law changes. We understand from national agents Christie and Co, who are active in the sector, that freehold values rose by over 8% in 2006, and they predict that 2007 will be another strong year.

This growth and optimism has been driven largely by the shortage of freehold interests resulting in competition for available supply. Although the smoking ban in enclosed spaces in England is a cause for concern for the market, we understand that the smoking bans in Scotland have had less of an impact on trading than commentators previously predicted.

There are opportunities for public house provision in the study area. The

demand generated from significant residential development will be substantial, especially if the proposals of the London Plan and Middlesex University are completed as these would create 8,000 new homes and residences for 2,000 students.

In terms of the restaurant industry, commentators predict steady ongoing growth. The number of restaurant outlets is increasing in tandem with population expenditure on eating out. There is fierce competition in the private restaurant market, but the pub dining industry is continuing to develop as it is increasingly offering higher quality products. Popular restaurant chains such as Café Rouge and Wagamama continue to open new restaurants and to seek new opportunities.

There is little current evidence of demand for such restaurant uses within the Colindale area, however it is our opinion given the growth prospects of the area and the likely mix of uses, that quality operators such as Strada, Café Rouge, Ask, Prezzo, Restaurant Bar and Grill etc could be attracted to the Colindale area in the future.

Health and Fitness

On a national scale the prospects for health and fitness are strong with steady year on year increases in the membership of fitness centres and

record revenue levels achieved over the last year.

At the top end of the market, targeting more affluent customers, are a number of premium operators (including David Lloyd Leisure and Esporta). In the 'mid range' are businesses such as Cannons, and the 'value end' comprises Fitness First and LA Fitness. Health and fitness clubs are flexible in terms of their locational requirements, and can form part of mixed development schemes, or 'leisure boxes' including offices and shopping. They require good access, particularly in the evenings and at weekends when the majority of clients arrive.

Currently there is limited leisure provision in the study area. The Peel Centre, which is part of the police training academy for North London offers private facilities that are not accessible to the general public. There are no public centres in the study area, with the nearest offer being Barnet Burnt Oak Leisure Centre. This centre is located to the north of the study area, approximately 1.5km to the north of Colindale station. In addition, Barnet Cophall Leisure Centre is situated roughly 1 km to the east of the study area, but is difficult to access due to the M1 motorway.

More widely the Borough currently provides a good range of both public and private health and fitness facilities. The Borough includes seven public

Public Leisure Facilities in Barnet
Barnet Burnt Oak Leisure Centre
Church Farm Pool
Compton Sports Centre
Cophall Pools and Stadium
Finchley Lido
Hendon Youth Sports Centre
Queen Elizabeth Sports Centre

Figure 7.9 public leisure facilities in Barnet (YELL)

facilities detailed in figure 7.9.

Of most significance to Colindale is the provision of a new leisure centre at Burnt Oak which has recently opened. The Barnet Burnt Oak Leisure Centre located on Watling Avenue, includes a range of facilities open to the public including a Wellness Health and Fitness Centre with 100 pieces of the latest equipment, dance studio, crèche, a four court badminton sports hall and modern indoor changing rooms. In addition the outdoor facilities include an all weather pitch for 7-a-side football and hockey, two junior 11-a-side grass football pitches and an outdoor facility changing room. There are also two outdoor tarmac areas for netball, football, basketball and tennis.

In addition to the Local Authority leisure facilities there are a number of private health and fitness operators

within / in close proximity to Colindale. These include those set out in figure 7.9.

Only Holmes Place, of the above listed operators, is recognised as a mainstream health and fitness operator. This is principally due to the current population profile within the area. Colindale is well placed to attract further the first / second tier operators through further development and diversify to include a higher proportion of economically active and affluent people.

Hotel Market

There is currently a very strong investor appetite for hotel property in London. Investor appetite is buoyed largely by the relative success of the economy, the decision of the IOC to award the 2012 Olympic Games to London, and the resilience of the tourism industry.

Demand, which comes from both UK and international investors, is outstripping supply, and is confirmed by a wealth of significant investor activity which has recently taken place in the capital. This situation is in contrast to the climate for the sector at the beginning of the decade when investors were less comfortable with the risk inherent in hotel property given the lack of guaranteed income.

Name	Location
The Burroughs Club	Middlesex University, 2 Campus Way, Hendon NW4 4
Barnet College	Grahame Park Way, NW9
The Laboratory Spa & Health Club	1a, Hall Lane, NW4 4TJ
Nautilus Hendon Health Club	Spalding Hall, 2 Victoria Road
Holmes Place Hendon Health Club	260 Hendon Way, NW4 3NL
Mr Fitta Health Club	7 Sentinel Square, Brent Street, NW4 2EL
North London Fitness Centre Ltd	TJ Fitness, Back Lane, HA8 OLQ
Body Talk	299 Burnt Oak Broadway, HA8 5ED
Physique Body Building Clinic	106 High Street, Edgware, HA8 7HF
Exercise Studio	120 High Street, Edgware
Fit Lady Gym	Hendon Film Studios, NW9 7EU
Hendon Youth Sports Centre	Marble Drive, NW2 1XQ
Barnet Cophthall Pools and Stadium	Great North Way, Hendon, NW4 1ps

Figure 7.10 private leisure facilities in Barnet

Visit London's Accommodation Supply Statistics show a 39% increase in hotel supply in London from 2002 to 2006, but this growth has come principally through the budget hotels sector which has grown considerably in recent years. (Figure 7.10, Source- Christie and Co agents).

Given the growth potential behind the hotel industry and the likely mix of uses for the area, there is a good opportunity for hotel development. An

example of an occupier that could operate successfully in the area is Premier Travel Inn. The company is actively seeking sites and often develops sites in conjunction with their Brewers Fayre restaurants and Costa Coffee operations. This is one example; however, we are of the opinion that further operators would be interested in operating from the area, given the likely growth prospects for Colindale.

Employment Market

The office market has outperformed the other property sub sectors over the last year and forecasters predict that this trend will continue for at least the next 2 to 3 years. This is largely because rental value growth for the sector is stronger than for retail and industrial property.

According to Cluttons research and IPD, the total return from office property at the end of the second quarter of this year was 3.4%, which gave an annual total return of 18.2%. These are lower returns than at the end of 2006 when the total return was 23%, but relative to the retail and industrial sectors the fall in performance has been modest. Offices are also the only main property sector not to see softening yields so far this year, and the sector accounted for a large proportion of investor interest, accounting for 52% of the value of all property transactions in the second quarter of this year. (Source- Cluttons Property Market Update- August 2007).

In addition, there are encouraging signs in the UK for office demand with the financial and business services sector especially flourishing, resulting in increased recruitment and business investment. The annual rate of rental value growth for offices was at 7.9% at the end of the second quarter of this year, compared to 2.4% for retail and 1.4% for industrial (source- Cluttons

research). The combination of constrained supply and optimistic demand side indicators suggests that offices will be the sector least affected by any market correction in 2007.

Local Dynamics- The Colindale Area

The office and industrial markets in and around the study area are dominated by local businesses. The majority of the business use is in the south west corner of the study area between Colindale station and Edgware Road, where there are office buildings of up to 10,000 sq ft. In addition, there are a number of industrial units on the eastern edge of the study area. These are small warehouses of 2,000- 3,000 sq ft. Most of these units have work yards and are occupied by local businesses, although building suppliers Travis Perkins operate from one of these units.

It is anticipated that any major office development within Colindale would require a significant level of pre let accommodation prior to a developer committing to development. However, we believe that opportunities exist to build upon the strength of small and medium sized businesses in the Borough. For example, we are aware that if such development were to be provided the University would potentially be interested in occupying some of the space. The growth of these

businesses could then be fundamental in complementing future residential led mixed use developments in the area. We also understand that a major existing local employer, the National Blood Transfusion Service, occupies a key site in the heart of Colindale and has plans to enlarge its presence in the area within the next 3 years.

With regard to office rental values, we understand these are in the region of £13.00 per sq ft. To illustrate this we are aware of the letting of an office property of 3,850 sq ft on West Hendon Broadway to the east of the subject study area this summer for a rent equating to £13.50 per sq ft.

In terms of industrial values, we understand that rents are in the region of £9.00-£10.00 per sq ft. We are aware of property being marketed in the subject area at Colindale Business Park for roughly £9.90 per sq ft, and at Kingsbury Trading Estate, slightly outside the study area, for £9.75 per sq ft. Both units were placed on the market this year.

Any future development of office and industrial property would need to be on a small scale. Larger employment space development would not be feasible as it would not fit with future residential proposals, and the existing market profile of the area, and it would unlikely to be possible to implement the infrastructure requirements of such a scheme.



Peel site call centre

Strengths/Weaknesses and Key Issues

Figure 7.10 sets out the strengths and weakness of the area from a property market perspective and the key issues which can be drawn from the analysis:-

Key Issues

Housing Sector

· Future development would need to provide a mix of unit types to accommodate a wide cross section of both public and private ownerships to assist in creating more mixed and balanced communities.

· There are a number of identified large-scale development opportunities within Colindale, including the Grahame Park Estate, RAF East Camp, Barnet College and Colindale Hospital sites. Development would need to be appropriately phased in accordance with an assessment of unit sales rates to ensure that the market is not flooded with an over supply of land or residential units which would have a detrimental affect on land and sales values and take up.

· The scope to introduce alternative business / community / local retail and leisure uses to stimulate activity should be considered to enable a mix of development within Colindale, to deter the area from becoming predominantly a dormitory suburb. The development of key focal points will greatly help to foster a community focus.

Strengths	Weaknesses
<ul style="list-style-type: none"> • Proximity to many good transport links, the M1, Edgware Road and tube stations. • Further infrastructure improvements planned in the short term. • Proximity to established retail centres at Brent Cross and The Hyde. • RAF Museum which attracts significant numbers of visitors. • Significant local employment at the Peel Centre and education facilities. • Current housing regeneration and new-build plans well advanced. • Proposals to expand the student accommodation in the study area and proximity to main University campus in Hendon. • Links to adjacent centres, Mill Hill, Hendon, Burnt Oak. • Strong developer / Investor demand. • Recent positive press. • A number of proactive landowners in the study area 	<ul style="list-style-type: none"> • Poor image of the existing housing estates. • No strong sense of place or vibrancy. • Indirect links to strategic roads. • Lack of cohesiveness. • Lack of current commercial demand (but improving). • Relatively high property prices. • Poor local retail and leisure provision. • Poor location for large-scale commercial/employment uses.

Figure 7.10 property market strengths and weaknesses

Local Retail and Leisure Uses

· Barnet provides a wide range of retail accommodation ranging from Brent Cross, the major sub regional centre, through to local neighbourhood centres which provide more of a localised retail function. Limited possibilities for significant retail expansion however strong opportunities to provide a good mix of local retailing to support the growing population.

· Opportunities to provide further local centres or parades to serve any future residential development within Colindale could be possible, if linked to wider regeneration and residential developments. In isolation they are unlikely to be strong value generators. However they would be justified on the basis of the importance of the provision of local shopping facilities for new residents.

· Opportunities for further leisure development such as health and fitness and sports provision which would need to reflect and complement the existing facilities.

· The introduction of evening economy activity such as bars, restaurants, hotel and associated leisure activities could potentially assist the diversity, attractiveness and use of the area if appropriately integrated within the wider community.

· Given the current profile of Colindale it is unlikely that significant interest would be achieved from mainstream bar / restaurant operators unless they could be integrated within mixed-use or commercial developments. However in light of the large scale of development planned commercial interest in the area is likely to increase significantly.

· The RAF Museum provides a major draw to Colindale and is seen as an important North London destination. The Museum attracts in the region of 200,000 visitors a year in addition to the use of the facility for exhibitions, conferences and large scale catering functions. Opportunities to enhance and fully promote the Museum should be supported and encouraged. Maximising important local assets e.g. RAF Museum, University Accommodation, Peel Centre, educational facilities etc will be a key

element of the areas' future success.
Office and Industrial Land Use Sectors

· Demand for large scale BI office accommodation is likely to be limited given the characteristics of the area. However there may be opportunities to build upon the small and medium sized employment accommodation within the Colindale area. This type of accommodation, if appropriately planned and developed, could be complimentary to future residential led mixed-use developments within Colindale. We are aware that the university would potentially be interested in occupying space if such accommodation were to be provided.



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