



London Borough of Barnet

Town Centres Floorspace Needs Assessment Volume 1 – Main Report

Peter Brett Associates

December 2017

	Name	Position	Signature	Date
Prepared by:	Francesca Rowson	Senior Planner	FR	
	Daniel Wheelwright	Principal Planner	DW	
Reviewed by:	Cathy Hall	Senior Associate	CH	
Approved by:				

Revision	Date	Description	Prepared	Reviewed	Approved
A	17/07/17	Initial draft	FR, DW, CH	CH	
B	08/08/17	Full draft – without recommendations	FR, DW, CH	CH	
C	09/10/17	Draft final report	FR, DW, CH	CH	
D	December 2017	Updated report	DW, CH	CH	

Peter Brett Associates LLP disclaims any responsibility to the client and others in respect of any matters outside the scope of this report. This report has been prepared with reasonable skill, care and diligence within the terms of the contract with the client and taking account of the manpower, resources, investigations and testing devoted to it by agreement with the client. This report has been prepared for the client and Peter Brett Associates LLP accepts no responsibility of whatsoever nature to third parties to whom this report or any part thereof is made known. Any such party relies upon the report at their own risk.

© Peter Brett Associates LLP 2017

THIS REPORT IS FORMATTED FOR DOUBLE-SIDED PRINTING

CONTENTS

- 1 INTRODUCTION..... 1**
- 2 PLANNING POLICY CONTEXT 3**
 - Introduction 3
 - National Planning Policy Framework 3
 - London Plan 4
 - Local policy 9
 - Summary.....13
- 3 PROFILE OF BARNET’S CENTRES.....14**
 - Introduction14
 - Major centres14
 - District centres15
 - Local centres.....19
- 4 MARKET AND ECONOMIC TRENDS24**
 - Introduction24
 - Research.....24
 - Market trends28
 - Economic trends33
 - Key findings.....37
- 5 RETAIL SPENDING PATTERNS.....38**
 - Introduction38
 - Spending patterns40
 - Summary.....45
- 6 QUANTITATIVE RETAIL NEEDS.....47**
 - Introduction47
 - Population and expenditure growth47
 - Claims on expenditure growth48
 - Quantitative need50
 - Summary.....52
- 7 COMMERCIAL LEISURE NEEDS53**
 - Spending patterns53
 - Leisure spending growth57
 - Quantitative leisure needs58
 - Key findings.....60

- 8 QUALITATIVE NEEDS61**
 - Introduction61
 - Key findings.....82
- 9 DEVELOPMENT OPPORTUNITY SITES83**
 - Introduction83
 - Site assessments83
 - Summary.....88
- 10 RECOMMENDATIONS AND CONCLUSIONS89**
 - Introduction89
 - Key recommendations.....89
 - General conclusions.....90
 - Centre-specific conclusions.....91

TABLES

- Table 2.1 Town centre classifications 7
- Table 2.2 Town centre potential future growth levels..... 9
- Table 3.1 Diversity of uses in Edgware.....14
- Table 3.2 Diversity of uses by unit – district centres17
- Table 3.3 Diversity of uses by unit – local and neighbourhood centres.....20
- Table 4.1 Summary of long-term retail growth prospects.....33
- Table 4.2 Adjusted SFT market shares (%).....35
- Table 5.1 Study zones by local authority39
- Table 5.2 LBB comparison spending patterns in 2017.....40
- Table 5.3 Convenience spending patterns in 201743
- Table 7.1 LBB leisure spending summary53
- Table 7.2 Food & drink market shares and turnover (2017).....54
- Table 7.3 LBB leisure sector expenditure growth 2017-2036 (£m)57
- Table 7.4 LBB centres leisure sector expenditure growth 2017-2036 (£m).....57
- Table 7.5 LBB food & drink capacity by 2017-203658
- Table 7.6 Cinema screen capacity 2017-2036.....59
- Table 8.1 Top 10 suggestions of improvements across Barnet’s district centres63
- Table 9.1 Opportunity site assessments.....83
- Barnet’s network of town centres..... 1

FIGURES

Figure 3.1 Location of district centres across LBB.....16
Figure 4.1 UK Grocery operators’ growth 2013-201830
Figure 5.1 Study area and study zones38
Figure 5.2 Convenience spending patterns by zone44
Figure 5.3 Spread of convenience stores across the study area which attract an overall market share45
Figure 7.1 Impact on night tube on restaurants and cafes55
Figure 7.2 Impact on night tube on pubs, bars and night-time economy56
Figure 8.1 Suggested improvements to Edgware town centre63
Figure 8.2 Proportion of respondents stating ‘no improvement needed’64
Figure 8.3 Analysis of responses relating to parking.....65
Figure 8.4 Analysis of responses relating to environmental issues66
Figure 8.5 Analysis of responses relating to shopping provision.....68

APPENDICES – SEE VOLUME 2 (SEPARATE DOCUMENT)

- APPENDIX A POLICY SUMMARY
- APPENDIX B TOWN CENTRE HEALTH CHECKS
- APPENDIX C STUDY AREA PLAN
- APPENDIX D COMPARISON TRADE DRAW MAPS
- APPENDIX E COMPARISON MARKET SHARE MAPS
- APPENDIX F COMPARISON MARKET SHARES OF KEY CENTRES BETWEEN 2008 AND 2017
- APPENDIX G COMPARISON TURNOVER OF LBB DESTINATIONS AND COMPETING CENTRES IN 2008 AND 2017
- APPENDIX H QUANTITATIVE RETAIL CAPACITY
- APPENDIX I QUANTITATIVE CAPACITY METHOD
- APPENDIX J LEISURE CAPACITY TABLES

1 INTRODUCTION

- 1.1 Peter Brett Associates LLP (PBA) was instructed by the London Borough of Barnet (LBB) in March 2017 to prepare an updated assessment of retail need for the borough.
- 1.2 The previous full assessment was published in April 2009 and subsequently updated in July 2010; since then, national policy for retail and town centres has been amended following the publication of the National Planning Policy Framework (NPPF) in March 2012.
- 1.3 This Town Centres Floorspace Needs Assessment (TCFNA) has been commissioned as a key evidence base document to inform the review of the Barnet Local Plan ('the Local Plan'). The report will provide an updated assessment of retail need for LBB in order to inform new retail and town centre policies for the borough. The study's specific terms of reference are set out below:
- Analyse national and regional planning policy and guidance on retail and town centres and identify existing evidence on retail needs in LBB;
 - Analyse trends affecting the retail sector which may impact and influence local retailing with the Borough and how this may change over time;
 - Identify recent planning permissions for town centre uses ('commitments') within and without the Borough which have the potential to impact on designated town centres;
 - Undertake a new household survey of shopping patterns to provide an updated picture of shopping habits in the study area in order to identify the catchment area of each town centre and the occurrence of under/over trading of convenience floorspace;
 - Analyse the quality of existing comparison and convenience retail provision and other town centre uses within LBB's 30 Major, District and Local / Neighbourhood town centres;
 - Identify existing and projected consumer expenditure levels for the study area taking into account the latest industry standard expenditure data and the latest available GLA population projections;
 - Assess future needs for comparison and convenience retail floorspace and other town centre uses to 2036 based on an existing market share and an increased market share, to take account of the effect of existing commitments;
 - Review the existing hierarchy and network of centres and make recommendations including identifying any deficiencies and potential for growth to meet identified needs where appropriate;
 - Assess potential site opportunities in and on the edge of existing centres;
 - Allied to the above, make recommendations on the appropriateness of town centre boundaries including primary shopping areas and primary; and

- Recommend appropriate retail planning policies for the new local plan, including a local threshold for retail impact assessments.

1.4 Responding to these terms of reference, the report is structured as follows:

- **Section 2** sets out the planning policy context;
- **Section 3** describes the strategic context and existing role and function of the various centres;
- **Section 4** sets out key trends in the retail and leisure sector;
- **Section 5** explains shopping patterns of the Borough's residents, based on evidence from a telephone survey of households, including comparison with the previous household survey results;
- **Section 6** assesses the quantitative need for additional retail floorspace in the convenience (food) and comparison (non-food) sectors;
- **Section 7** assesses the quantitative need for additional floorspace for commercial leisure uses;
- **Section 8** assesses the qualitative need for additional floorspace across the Borough including potential site opportunities to accommodate any identified growth;
- **Section 9** considers potential development opportunity sites to meet any identified needs; and
- **Section 10** sets out the recommendations and conclusions.

2 PLANNING POLICY CONTEXT

Introduction

- 2.1 This section summarises the planning policy context as it applies to this TCFNA. In particular, it considers the relevant requirements of the NPPF and Planning Practice Guidance (PPG) in respect of local authorities' obligations to assess and meet needs. The development plan, in the form of the London Plan and the LBB's Local Plan Core Strategy and Development Management Policies documents, are also reviewed.

National Planning Policy Framework

- 2.2 The NPPF was published by the Government in 2012. Paragraph 14 includes a presumption in favour of sustainable development, which for plan-making means that:

'Local planning authorities should positively seek opportunities to meet the development needs of their area;

Local plans should meet objectively assessed needs, with sufficient flexibility to adapt to rapid change, unless:

Any adverse impacts of doing so would significantly and demonstrably outweigh the benefits, when assessed against the policies in this Framework taken as a whole; or

Specific policies in this Framework indicate development should be restricted.'

- 2.3 In order to be considered sound, Local Plans should be **positively prepared** (i.e. based on a strategy which seeks to meet objectively assessed development and infrastructure requirements), **justified** (i.e. the most appropriate strategy, when considered against the reasonable alternatives), **effective** (i.e. deliverable and based on joint working) and **consistent** with national policy (paragraph 182).

- 2.4 Paragraph 23 states that planning policies should be positive, promote competitive town centre environments and set out policies for the management and growth of centres. There is a requirement for local authorities to recognise town centres as the heart of their communities and to define a network and hierarchy of centres that is resilient to anticipated future economic changes. Finally, there is an important requirement that:

'needs for retail, leisure, office and other main town centre uses are met in full and are not compromised by limited site availability'

- 2.5 The NPPF also requires local plans to be based on adequate, up-to-date and relevant evidence about the economic, social and environmental characteristics and prospects of the area. In terms of a retail evidence base, paragraph 161 states that they should assess:

'the needs for land or floorspace for economic development, including both the quantitative and qualitative needs for all foreseeable types of economic activity over the plan period, including for retail and leisure development;

the role and function of town centres and the relationship between them, including any trends in the performance of the centres;

the capacity of existing centres to accommodate new town centre development;

locations of deprivation which may benefit from planned remedial action.'

- 2.6 The Government produced PPG in March 2014 as web-based guidance and support to the policies contained within the NPPF. Matters associated with town centre uses are set out in the section 'Ensuring the vitality of town centres'.
- 2.7 The PPG explains that a positive strategy for town centres, articulated through the local plan, is key to ensuring successful town centres which enable sustainable economic growth and provide a wider range of social and environmental benefits.
- 2.8 The PPG requires that town centre strategies should be based on evidence of the current state of town centres and opportunities to meet development needs and support their viability and vitality. Strategies should identify changes in the hierarchy of town centres, including where a town centre is in decline. In these cases, strategies should seek to manage decline positively to encourage economic activity and achieve an appropriate mix of uses commensurate with a realistic future for that town centre.

London Plan

- 2.9 At the regional level, the Spatial Development Strategy for London ('the London Plan') provides the overall strategic plan for Greater London setting out an integrated planning framework for the development up to 2036. The current version of the London Plan was originally adopted in July 2011; however, the following alterations have taken place since adoption:
- Revised early minor alterations to the London Plan (published October 2013);
 - Further alterations to the London Plan (published March 2015);
 - Housing standards minor alterations to the London Plan (published March 2016); and
 - Parking Standards minor alterations to the London Plan (published March 2016).
- 2.10 A full review of the London Plan, including supporting evidence documents is also underway. This is currently at an early stage of informal consultation with a Draft London Plan scheduled to be consulted on in Autumn 2017 followed by an Examination in Public in Summer 2018 and anticipated adoption in Autumn 2019.
- 2.11 The main changes to the 2011 version of the London Plan have been the adoption of the Further Alterations to ensure conformity with the NPPF and to address London's increased population growth projections. The relevant adopted version of the London Plan is dated March 2016. We summarise the relevant policies below.
- 2.12 Policy 2.15 seeks to coordinate the development of a network of town centres across London. Town centres are identified as areas with opportunity for commercial intensification and residential development. To enhance the viability and vitality of town centres', development proposals should accommodate economic and/or

housing growth, as well as enhancing the quality and diversity of retail, leisure, arts and other consumer services and public services. Criterion B of Policy 2.15 requires that changes to the town centre network such as designation of new centres or extension of existing centres should be strategically coordinated with relevant planning authorities. Where there are identified deficiencies in provision, consideration should be given to the potential for promoting centres to function at a higher level or be a justification for an entirely new centre. This is particularly the case in relation to regeneration priorities and/ or the potential to improve local accessibility. Where centres are experiencing '*persistent problems of decline*' which are unlikely to be able to overcome, it may be appropriate to re-classify that centre to a lower level in the hierarchy.

- 2.13 Paragraph 2.72B of the London Plan highlights that recent evidence has shown the multiple challenges now being faced by conventional retailers. Whilst London's scale can to some extent mitigate this, it is likely that broader economic and social roles will be required to sustain and enhance town centres. Town centre management is therefore crucial to navigating this process. Paragraph 2.72D sets out how the different scales of town centres within Greater London may be affected by the impact of the internet and multi-channel retailing patterns. This may have a polarising effect such as a positive effect for Metropolitan and Major centres and potentially a negative effect for medium sized District centres due to the consolidation of retail provision. Local centres may also respond positively to market changes through the trend towards more localised convenience shopping trips. We discuss market trends in Section 4.
- 2.14 Policy 4.6 seeks to enhance the provision of professional sports, cultural and entertainment enterprises recognising the benefits that the night-time economy makes to the wider London economy as well as to residents and visitors. LBB town centres are each identified as containing a 'Strategic Cluster' of night time activity of both sub-regional and local importance. In developing local plans, Boroughs are required to designate cultural quarters and manage night-time entertainment uses in a coordinated approach with licensing, policing and transport.
- 2.15 Policy 2.16 seeks to collaboratively identify, develop and promote '*strategic development centres*' in outer London with one or more strategic economic functions through the coordination of private and public sector investment and through the development and implementation of planning frameworks. Table 2.1 of the London Plan highlights a number of potential Outer London Development Centres which includes Brent Cross under the '*retail*' strategic function.
- 2.16 Policy 4.7 deals with retail and town centre development. It explains that the Mayor supports a 'strong partnership approach' to assessing the retail, commercial, cultural and leisure capacity in town centres. It states that in developing Local Plans, Boroughs should:

'Identify future levels of retail, leisure and other commercial floorspace need in light of integrated strategic and local assessments;

Undertake regular town centre health checks to inform strategic and local policy and implementation;

Take a proactive partnership approach to identify capacity and bring forward development within or, where appropriate, on the edge of town centres; and

Firmly resist inappropriate out of centre development; manage existing out of centre retail and leisure development in line with the sequential approach; seeking to reduce car dependency; improve public transport, cycling and walking access; and promote more sustainable forms of development.'

- 2.17 Policy 4.8 promotes a competitive and diverse retail sector with centres that provide sustainable access to the goods and services that Londoners need. In order to maintain successful centres Local plans should:
- Support additional comparison goods shopping in larger centres and convenience retailing in smaller centres;
 - Provide a policy framework for enhancing local shopping and specialist shops;
 - Identify areas under served by convenience goods and support local markets;
 - Support the development of e-tailing and more efficient delivery systems; and
 - Manage clusters of town centre uses, particularly food and drink uses, with regard to their impacts on the priorities of the London Plan.
- 2.18 Policy 4.9 is concerned with the provision of affordable shop units suitable for small or independent retailers. Boroughs are expected to develop local policies to support the provision of affordable shop units, secured through seeking contributions or imposing conditions on large retail developments.
- 2.19 Annex One of the London Plan allocates three opportunity and intensification areas within LBB (OIA). These OIAs are major brownfield sites with significant capacity to development for housing, employment and other uses linked to existing or proposed improvements to public transport accessibility. Table A1.A identifies the three OIAs as follows:
- **Colindale/ Burnt Oak:** the Colindale Area Action Plan (AAP) was adopted in March 2010 and covers 262ha in total including: Colindale district centre and the Grahame Park Estate local centre. The area is also in close proximity to Burnet Oak district centre. The area has an indicative capacity to deliver up to 2,000 jobs and a minimum of 12,500 new homes over the next 20 to 30 years.
 - **Cricklewood and Brent Cross:** a joint Opportunity Area Planning Framework (OAPF) was originally endorsed by the Mayor in the 2004 London Plan. A Regeneration Area Development Framework for Cricklewood, Brent Cross and West Hendon was subsequently adopted by LBB in December 2005. The OIA is a significant 292ha regeneration site which includes an extension to the Brent Cross Shopping Centre as part of wider mix of uses principally involving residential and commercial uses. The London Plan identifies the Cricklewood and Brent Cross OIA to deliver at least 10,000 homes and an employment capacity of 20,000 jobs over the next 20 to 30 years.

- 2.20 As part of its status as an Outer London Development Centre designation in the London Plan (table 2.1)¹, outline planning permission was granted for the expansion and redevelopment of the area around Brent Cross framework area in June 2010, following the Secretary of State’s decision not to call it in. An application for reserved matters in connection with Phase 1B (North) of the 2010 outline planning permission was submitted in May 2017. Phase 1B (North) is seeking to deliver the bulk of the new retail floorspace and leisure floorspace though also includes a replacement Brent Cross Bus Station, 52 residential units, a new hotel, new energy centre, the Brent Riverside Park (including a Nature Park) and improvements to Sturgess Park. The application is currently under consideration by LBB.
- 2.21 **Mill Hill East:** is an intensification area of approximately 48ha largely covering the former Inglis MoD Barracks. The Mill Hill East Area Action Plan was adopted in January 2009 and sets out the development principles for redevelopment of the site. The intensification area is expected to deliver a minimum of 2,000 homes and 500 jobs. Whilst Mill Hill East does not cover any district or local centres, it lies close to Holders Hill Circus Local Centre.
- 2.22 Annex Two of the London Plan sets out the existing hierarchy of centres in London and identifies five main types of centre according to their role and function. Annex 2 provides strategic guidance on policy directions for individual town centres, including their potential for growth. It has been informed by the latest London-wide retail need study (2013), town centre health checks, the 2012 office policy review and collaborative work with the boroughs and Outer London Commission. The five broad categories of town centres, with indicative floorspace and appropriate uses for each are shown in Table 2.1. The table also indicates the classification of the LBB’s thirty town centres within this hierarchy.

Table 2.1 Town centre classifications

Classification	LBB town centres	Floorspace (sq.m gross)	Types of uses
International	-	Over 100,000	Globally renowned retail destinations with a wide range of high-order comparison goods.
Metropolitan	-	At least 100,000	Significant proportion of high order convenience goods in addition to leisure and service floorspace.
Major	Edgware	50,000	Retail, leisure and service floorspace with a relatively high proportion of comparison goods.

¹ 2004

Classification	LBB town centres	Floorspace (sq.m gross)	Types of uses
District	Brent Street Burnt Oak (partly within LB Brent and LB Harrow) Chipping Barnet Church End, Finchley Colindale - The Hyde (partly within LB Brent) Cricklewood (partly within LB Brent) East Finchley Golders Green Hendon Central Mill Hill North Finchley New Barnet Temple Fortune Whetstone	10,000 – 50,000	Retail, leisure and service floorspace with some specialist retail.
Neighbourhood/local	Apex Corner Childs Hill Colney Hatch Lane Deansbrook Road East Barnet Village Friern Barnet Golders Green Road Grahame Park Great North Road Hampden Square Hale Lane Holders Hill Circus Market Place New Southgate West Hendon	-	Small supermarket (up to 500sq.m), post office, pharmacy, laundrette and other local services.

Source: Table A2.1, the London Plan (2016)

- 2.23 Table 2.2 identifies potential changes to the London-wide town centre network over the Plan period up to 2036. While Brent Cross Shopping Centre is currently identified as a ‘major shopping centre’ and therefore not a town centre, as a consequence of being recognised as an Outer London Development Centre and on the basis that the current expansion and redevelopment proposals will be implemented, it has the potential to become the borough’s first metropolitan centre.
- 2.24 The London Plan also identifies the future policy direction for each town centre of district centre status and above in terms of the level of growth (low, medium and high) in Table A2.1. We summarise these in Table 2.2 below. The majority of LBB’s major and district town centres are identified as ‘medium growth centres’ with moderate levels of demand for retail, leisure or office floorspace with the physical infrastructure to support this. However, because of the planned growth, Cricklewood is identified as a ‘high growth centre’ due to its presence within the OIA which as a whole is likely to experience strategically significant levels of growth with strong demand and/or large-scale retail, leisure or office development in the pipeline and with existing or potential

public transport capacity to accommodate it. However, Cricklewood centre itself, is unlikely to see significant growth.

Table 2.2 Town centre potential future growth levels

Classification	LBB centres	Growth level	Regeneration
Major	Edgware	Medium	No
District	Brent Street Burnt Oak (shared with LB Brent and LB Harrow) Chipping Barnet Church End, Finchley Colindale - The Hyde (shared with LB Brent) East Finchley Golders Green Hendon Central Mill Hill North Finchley New Barnet Temple Fortune Whetstone	Medium	No
	Cricklewood (shared with LB Brent)	High	Yes

Source: Table A2.1, the London Plan (2016)

- 2.25 In addition to the main town centres, LBB is served by a network of 50 smaller centres. Appendix A of the contains a list of these neighbourhood parades.

Local policy

- 2.26 This report will inform the retail and town centre policies of the proposed review of the Local Plan. Upon adoption, the new Local Plan will supersede LBB's adopted retail and town centre policies. These are principally set out in two key development plan documents; the Local Plan Core Strategy, adopted in 2012, and the Local Plan Development Management Policies, adopted in 2012. In addition, there are the remaining saved policies of the Barnet Unitary Development Plan (UDP). Key saved policies have been retained to underpin regeneration of the Brent Cross and Cricklewood opportunity area which themselves are supported by the development principles the development principles set out in the Cricklewood, Brent Cross and West Hendon Regeneration Area Development Framework.

Barnet's Local Plan Core Strategy (September 2012)

- 2.27 **Policy CS1: Barnet's place shaping strategy – protection, enhancement and consolidated growth – the Three Strands Approach** is the overarching strategic policy guiding development in the Borough. In particular, it seeks to concentrate and consolidate development in key accessible locations including the three opportunity and intensification areas identified in the London Plan (Brent Cross-Cricklewood, Colindale and Mill Hill East Regeneration Areas). Additionally, it sets out aspirations to enhance the 'priority town centres' of Chipping Barnet, Edgware, Finchley Church End and North Finchley.

- 2.28 **Policy CS6: Promoting Barnet's town centres** details the level of comparison (16,800 sq. m net sales) and convenience (2,200 sq. m net sales) retail floorspace to be accommodated to 2026. Additional comparison retail floorspace is to be particularly to be focussed in Edgware, North Finchley and Chipping Barnet in light of strong expenditure growth in these locations. However, development opportunities in other district centres and larger local centres will be supported. No major convenience retail provision is proposed under Policy CS6 until beyond 2026 due to the low level of convenience capacity indicated in the 2010 TCFNA.
- 2.29 Policy CS6 also promotes Brent Cross/Cricklewood as a new metropolitan town centre and an Outer London Development Centre (London Plan Policy 2.16) through mixed-use regeneration in accordance with the London Plan. Importantly the role of Brent Cross is to change through redevelopment from a shopping centre to have a greater mix of retail uses and services (including significantly enhanced public transport provision) prevalent in larger town centres. We discuss the future role of Brent Cross/Cricklewood further at paragraph 2.38.

Local Plan Development Management Policies (September 2012)

- 2.30 The Local Plan Development Management Policies document (LPDMP) sets out a suite of policies to guide the consideration of planning applications within the borough. The LPDMP also contains the definitive policy inset maps for each defined town centre as shown in Table 2.1 above. Relevant policies covering town centres and regeneration areas in the LPDMP are:
- **Policy DM11** – seeks to ensure town centre uses are accommodated in Major and District centres within the borough in accordance with the NPPF sequential test, with A1 uses focused within the defined primary and secondary frontages accordingly. The pre-amble to DM11 sets a local edge of centre definition of 150m from the town centre boundary as part of the need for a sequential assessment. Proposed retail extensions below 200 sq.m do not require a sequential assessment.
 - **Policy DM12** – protects existing A1 uses in local and neighbourhood centres, as well as shopping parades from change of use to non-retail uses subject to a range of criteria.

Barnet Unitary Development Plan (2006)

- 2.31 The UDP was adopted in May 2006. While the Core Strategy and Development Management Policies Local Plan has replaced the majority of the policies in the UDP, there are a number of saved policies for Brent Cross and Cricklewood. In order to provide a longstanding policy framework to secure the comprehensive redevelopment of Brent Cross and Cricklewood, these 'saved' policies continue to operate until it is appropriate to replace them.
- 2.32 The UDP states that the regeneration of the area provides an opportunity for the transformation of Brent Cross Shopping Centre in a sustainable manner. Saved

Policy C6 states 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, amongst other factors, the scale of new comparison retail floorspace falling within the identified requirement of 55,000 sq. m (gross) comparison retail floorspace within the primary frontage being for predominantly class A1 uses.

Colindale Area Action Plan (2010)

- 2.33 The Colindale Area Action Plan (AAP) was adopted in June 2009. The AAP sets out the framework for the future development of the Colindale area, which is identified as an area for significant strategic growth in the London Plan, with an indicative growth estimate of 2,000 new homes and 500 new jobs within the area.
- 2.34 The AAP states that the level of retail provision required in Colindale is dictated solely by the housing growth planned. This assumption is stated as being important as the approach has no impact on the vitality and viability of existing centres because it only caters for demand generated within the Colindale AAP area. The AAP states that the expenditure generated by all the future residents proposed in the AAP area will require circa 2,400 sqm net convenience goods sales floorspace, which equates to approximately 5,000 sqm gross (including some comparison goods floorspace).
- 2.35 Accordingly, Policy 7.4 states that a neighbourhood centre will be provided at Colindale Avenue, incorporating around 5,000 sq m gross of retail space, along with supporting health, leisure and community uses.

Mill Hill East Area Action Plan (2009)

- 2.36 The Mill Hill East AAP was adopted by LBB in January 2009. The AAP area is focused around Inglis Barracks, a former operational base for the MoD, which is earmarked for 2,000 new homes, 500 jobs, as well as a new community hub to provide retail, commercial and community facilities.
- 2.37 Policy MHE4 states that residential development will be supported by the provision of on-site community facilities to meet the needs of new residents, whilst Policy MHE5 goes on to specify that retail development will be limited to small scale local convenience uses and retail services to serve the new residential population, with around 1,000 sq. m of retail floorspace proposed as part of the local neighbourhood centre to complement and enhance existing retail provision at Holders Hill Circus and Langstone Way.

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

- 2.38 The Cricklewood, Brent Cross and West Hendon Regeneration Area Development Framework (adopted December 2005) sets out a vision 'to create a new gateway for London and a vibrant urban area for Barnet'. The area is earmarked to be the heart of a new mixed use development and provide a new town centre for Barnet to support approximately 10,000 new homes. In addition, the Development Framework establishes that the regeneration of the area will comprise:

- up to 420,000 sq .m of business space, primarily comprising office accommodation;
- 27,000 sq. m of leisure space;
- 55,000 sq. m of comparison retail;
- 20,000 sq. m of convenience shopping;
- 2 new hotels;
- community facilities; and
- a freight facility.

Town Centre Frameworks

- 2.39 LBB has produced a series of Town Centre Frameworks and Strategies (TCF/TCS) which aim to enhance the vibrancy and viability of town centres and provide the basis for managing and promoting positive change in identified town centres. They are intended to focus on the ‘priority town centres’ identified under Policy CS1. The following TCF/TCS have been prepared or are under preparation to date:
- New Barnet (November 2010)
 - Finchley Church End (June 2012)
 - The Spires Shopping Centre, Market Site and Territorial Army Centre (July 2012)
 - Chipping Barnet (June 2013)
 - Edgware (June 2013)
 - North Finchley (draft October 2017)
- 2.40 We provide a summary of the TCSs and TCFs in Appendix A alongside other LBB strategy documents including the ‘Entrepreneurial Barnet 2015-2020’ strategy which encourages the set-up of new small businesses which amongst other initiatives will assist in town centre regeneration.
- 2.41 LBB’s intentions for other town centres are set out in Policy CS6 which states that it will take a planned approach to manage development opportunities in Golders Green, Whetstone and New Barnet. It also highlights that LBB will pursue further opportunities for town centre enhancement at smaller centres that attract private sector investment or have been highlighted for priority action.
- 2.42 The emerging Golders Green Town Centre Strategy will reflect the Golders Green Station site as well as identify other development opportunities within the Town Centre. The Strategy will define the overall vision for the area, identify local issues, as well as suggest future improvements and developments which may be directly delivered or brought forward. Specifically, it will assist in guiding future investment and development proposals by both the private sector and TfL, ensuring they appropriately address local issues, including improvements to public realm, social infrastructure, transport and housing.

Summary

- 2.43 At the national level, the NPPF is clear that local plans should set policies for the management of town centres and that, for local plans to be sound, these policies should be supported by an assessment of both the quantitative and qualitative need for town centre uses, including retail.
- 2.44 The London Plan sets the direction of growth for Barnet's town centres down to District level, as well as setting out the three opportunity and intensification areas primarily with the borough (Brent Cross/ Cricklewood, Mill Hill East and Colindale). It also identifies a number of requirements for local authorities to consider when formulating town centre policies. Those additional requirements, which are additional to those set out in the NPPF include; designating and managing night-time entertainment uses and clusters of food and drink uses; supporting e-tailing and more efficient delivery systems; and, supporting the delivery of affordable shop units.
- 2.45 The BLPCS and LPDMP set out the hierarchy of town centres in the borough, including revised town centre boundaries and primary and secondary shopping frontages. The level of additional retail floorspace required until 2026 in the BLPCS is 16,800 sq.m (net) for comparison retail (excluding Brent Cross) and a modest 2,200 sq.m (net) of convenience floorspace. In particular, LBB seek to focus identified retail and town centre needs on the three opportunity and intensification areas (OIAs) identified in the London Plan, as well as enhancement of four 'priority town centres' Chipping Barnet, Edgware, Finchley Church End and North Finchley. AAPs and a development framework have been produced to guide the delivery of the OAs and IAs. In addition, TCFs and TCSs have been (or are being) prepared to guide new opportunities in the priority town centres.
- 2.46 Key to both the BLPCS and the saved policies of the UDP is the achievement of a new metropolitan town centre at Brent Cross/Cricklewood. This provides for an additional 55,000 sq.m (gross) predominantly comparison retail floorspace.

3 PROFILE OF BARNET'S CENTRES

Introduction

- 3.1 This section considers the current role and function of the designated town centres in Barnet. The analysis is informed by the health checks of the thirty major, district and local/neighbourhood town centres undertaken by PBA in May and June 2017 which are set out in detail in Appendix B . Where appropriate we also assess the potential for change in the role of these centres over the plan period; in particular, any changes within the town centre hierarchy having regard to continuation of current trends and predicted policy interventions.

Major centres

Edgware

- 3.2 Edgware situated at the north-west of the Borough is currently the only major centre in Barnet. The main shopping streets within the centre are Station Road (A5100) and High Street (A5). The High Street bisects the borough boundary, with LB Harrow to the west of High Street and LBB to the east.
- 3.3 In line with its status, Edgware is a larger centre providing a greater range of retail shops including a substantial independent provision alongside multiple retailers situated within the Boardwalk Shopping Centre. The centre also provides a substantial range of retail and other services as well as a range of cafes and restaurants as well as some leisure offer. This ensures that the centre performs a greater than District level function, also drawing custom from residents in LB Harrow and LB Brent.
- 3.4 Table 3.1 below summarises the diversity of uses present within Edgware in comparison with the UK average.

Table 3.1 Diversity of uses in Edgware

Category	No. of units	% of units	UK %	Floorspace (sq.m)	Floorspace (%)	UK %
Convenience	164	56.2	9.41	24,463	60.44	18.34
Comparison	32	11.0	39.10	4,139	10.23	44.18
Service	76	26.0	38.17	9,199	22.73	25.84
Vacant	16	5.5	12.13	2,141	5.29	10.71
Other	4	1.37	1.19	530	1.31	0.97
Total	292	100	100	40,472	100	100

Source: GOAD/LBB

- 3.5 Edgware has a significant level of convenience provision (56.2% by unit) which has substantially risen from the 2009 study assessment (10.5%). This is a trend across many of the Borough's centres, however the scale of change is noticeably higher at Edgware. This corresponds with the proportion of comparison provision falling from 34.7% previously to 11% (by unit) and service provision falling from 48.1% to 26%

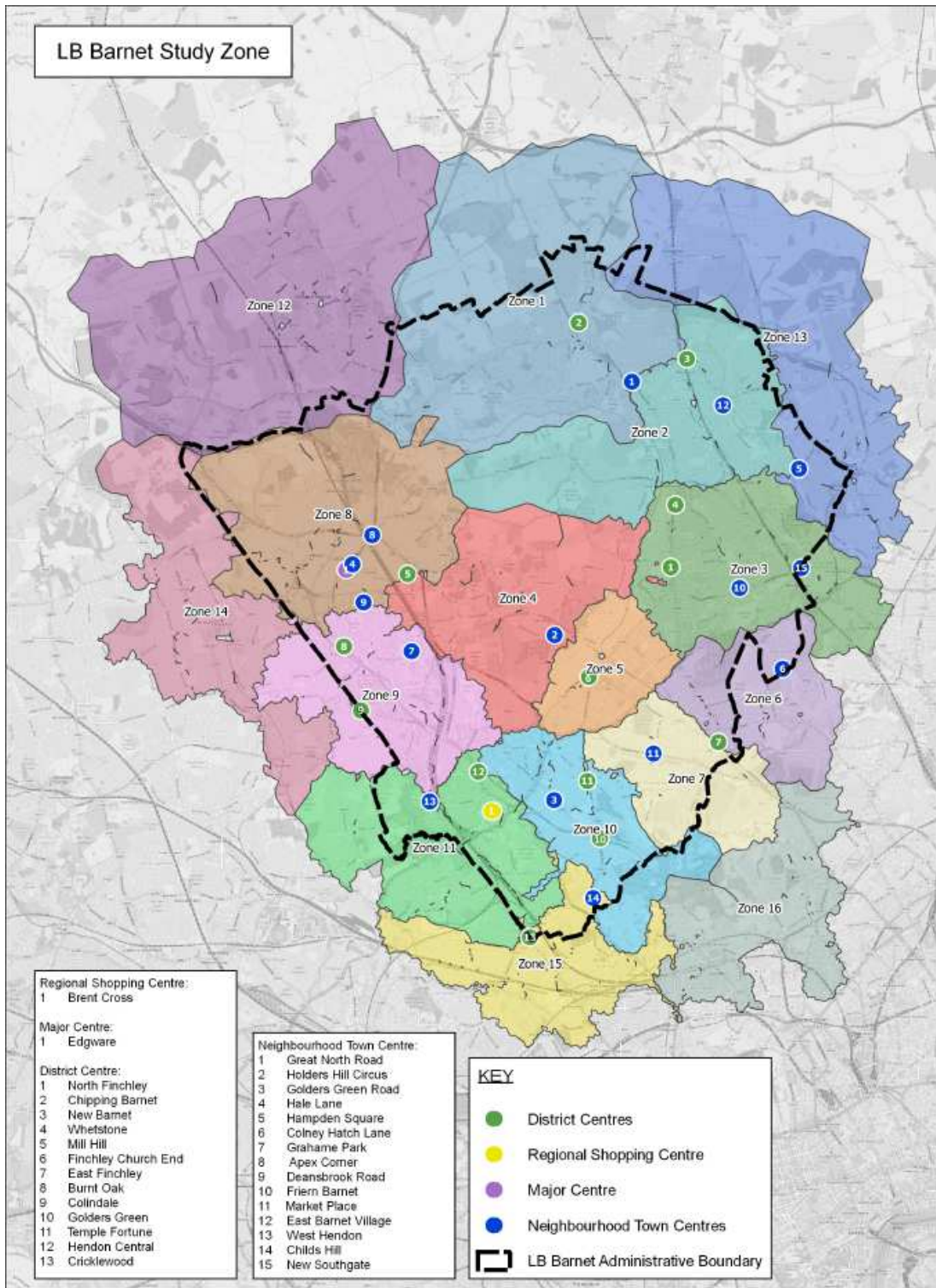
(by unit). On the face of it, this fall is concerning however it appears to mainly relate to the loss of smaller comparison and service units within the centre. However, comparison provision within the Broadwalk Shopping Centre remains strong, providing a number of key multiples to drive footfall. Service provision whilst reduced remains strong within the centre, and is only approximately 12% below the UK average.

- 3.6 Edgware has excellent accessibility being centred around Edgware tube station with numerous frequent bus services, as well as substantial car parking capacity. The environmental quality of the centre is split, with the northern half providing a pleasant environment with recent investment; however, the southern end of the centre is affected by the predominance of cars due to the busy junction.
- 3.7 There are potential development opportunities at the centre through a potential extension of the Boardwalk Shopping Centre as a number of opportunity sites around Forumside.

District centres

- 3.8 Figure 3.1 below shows the distribution of town centres across the borough (see also Appendix C Appendix A for a full size version). This demonstrates that the geographic spread of district centres is largely concentrated towards the edges of the borough and particularly around key arterial road and tube routes to central London. To the west, Cricklewood, Colindale – The Hyde and Burnt Oak are centred around the A5, and share a close relationship with neighbouring LB Brent and LB Harrow. To the east, the A1000 (High Road / Barnet Hill) is a key corridor linking East Finchley, North Finchley, Whetstone, New Barnet and Chipping Barnet. Towards the centre, there is a 'v' formation of district centres with Golders Green, Temple Fortune and Church End, Finchley anchored on Finchley Road / Regents Park Road forming the western portion. The eastern element of the 'v' comprised Golders Green, Brent Street and Mill Hill which are anchored around Watford Way. There are notably fewer District Centres to the north of the District reflecting the lower predominance of main arterial routes and tube links in this location.

Figure 3.1 Location of district centres across LBB



3.9 Table 3.1 shows the breakdown of uses in each of the town centres in LBB.

Table 3.2 Diversity of uses by unit – district centres

District centre	Convenience		Comparison		Service		Vacant		Other		Total
	No. units	% units	No. units	% units	No. units	% units	No. units	% units	No. units	% units	
Brent Street	25	12.4	32	15.9	125	62.2	19	9.5	0	0	201
Burnt Oak*	51	24.9	42	20.5	101	49.3	6	2.9	5	2.44	205
Cricklewood	32	13.6	53	22.6	137	58.3	13	5.5	0	0	235
Chipping Barnet	19	8.0	63	26.6	132	55.7	21	8.9	2	0.8	237
Colindale – The Hyde*	62	61.4	17	16.8	13	12.9	8	7.9	1	1.0	101
East Finchley	14	12.7	30	27.3	63	57.3	2	1.8	1	0.9	110
Finchley Church End	23	11.0	33	15.8	141	67.5	11	5.3	1	0.5	209
Golders Green	19	10.2	40	21.5	116	62.4	11	12.13	0	0	186
Hendon Central	16	10.8	23	15.5	102	68.9	3	2.0	4	2.7	148
Mill Hill	13	11.6	25	22.3	69	61.6	3	2.7	2	1.8	112
New Barnet	3	6.8	8	18.2	27	61.4	6	13.6	0	0	44
North Finchley	23	10.7	57	26.6	115	53.7	16	7.5	3	1.4	214
Temple Fortune	26	16.6	51	32.5	72	45.9	7	4.5	1	0.6	157
Whetstone	6	6.6	24	26.4	57	62.6	4	4.4	0	0	91
LB Barnet borough average	-	16.7	-	22.0	-	54.1	-	6.6	-	0.7	-
UK average	-	9.4	-	39.1	-	38.2	-	12.1	-	1.2	-

Source: LBB *Figures include all units situated within the town centre boundary where it is shared with neighbouring boroughs.

- 3.10 Table 3.2 highlights the variety in scale of Barnet's district centres ranging from New Barnet with 44 shop units up to Chipping Barnet with 237 shop units. There are clear groupings within the District centre level with Chipping Barnet, Cricklewood, North Finchley, Finchley Church End, Burnt Oak and Golders Green tending towards the upper level of that designation.
- 3.11 The average of all LBB district centres in comparison to the UK national average reveals that the general pattern is for a higher level of convenience (16.7% compared to 9.4%) and service provision (54.1% compared to 38.2%). This is consistent with national trends which have seen gradual increases in both convenience retail and service provision. However, comparison retail provision on average in the Borough is lower than the UK average (23.6% compared to UK average of 39.1%). Positively the

average level of vacancies in LBB's District Centres (6.8%) is approximately half the current UK national average (12.1%). This appears to show a broadly consistent pattern since the last assessment was undertaken in the 2010 TCFNA update. However, care has to be exercised when considering averages as it can mask larger variations such as Golders Green (12.1% level of vacancies) and New Barnet (13.6% vacancies) which are at or just above the national average. Whilst the vacancy level at Golders Green has increased from 8.1% in 2010, New Barnet's vacancy level has actually reduced from the 17.5% recorded in the previous TCFNA in 2010.

- 3.12 The largest district centres by number of units are Chipping Barnet, Cricklewood, Burnt Oak, Finchley Church End, North Finchley and Golders Green. These centres are towards the upper end of the scale of the London Plan's identified criteria for a district centre, and service a reasonably wide catchment, including in a number of cases from neighbouring boroughs. Indeed, the proposed Brent Cross-Cricklewood Regeneration Development Framework, identifies the provision of a new major centre as part of the expansion and integration of Brent Cross Shopping Centre into its wider surrounding area. We discuss this further in Section 6.
- 3.13 As highlighted in our health check assessments (see Appendix B), these centres serve a wider catchment providing a broader range of both multiple and independent retailers. While a common feature amongst all district centres in the borough, the level of convenience retail provision in these centres is well above the UK average. This reflects their service centre role, and also the growth of the convenience sector more generally. Though comparison retail within these larger district centres is proportionately well below the UK average, a reasonable range is still provided, particularly where in-centre shopping centres are present (e.g. The Spires, Chipping Barnet) or where larger floorplate units have been created through amalgamation or are purpose built (e.g. North Finchley).
- 3.14 In addition, the key markets in Barnet are also located in the larger centres with Barnet Market operating from Chipping Barnet and Lodge Lane from North Finchley. However, Watling Market at Burnt Oak is not currently operating due to the expiry of the lease and is currently being marketed by LBB. This is a concern, as markets are a key generator of footfall as well as a known attractor to centres. In addition, there are also a number of occasional farmers' and other specialist markets within the larger district centres generating additional activity and associated spend. These include:
- 'Finchley Feast', Grand Arcade, North Finchley
 - Whetstone Farmers' Market
 - Temple Fortune International Food Festival
 - French Market, East Finchley
- 3.15 The smaller district centres such as New Barnet, Colindale – The Hyde, Whetstone and East Finchley vary in role and function depending on their proximity to other centres. For example, New Barnet is anchored by a large Sainsbury's convenience store with limited comparison and service provision due to the relative proximity of Chipping Barnet. Similarly, Whetstone is anchored by Waitrose but again has limited comparison and services provision due to its proximity with North Finchley. There are

- others with a very defined offer such as the predominant convenience provision at Colindale – The Hyde reflecting the diversity and multi-ethnic representation in the area.
- 3.16 In line with their role, accessibility in the district centres is generally excellent. Again the larger district centres have the best PTAL rating reflecting close proximity to a tube / mainline railway station and a range of frequent buses to other significant centres and destinations. Where a tube station is not present (Brent Street, Temple Fortune) the PTAL rating reduces to PTAL 2-4, however these centres are still served by very frequent buses.
- 3.17 A recurring theme in relation to pedestrian accessibility, is the tension between navigating the centres and the heavy volumes of traffic travelling through the centres. This is not a surprise given that most of the centres are orientated around arterial routes into and away from Central London. This also affects the quality of the town centre environment with significant traffic reducing the enjoyment of the local centre. However, where centres have wide pavements (such as Whetstone) or side streets (e.g. Cricklewood and Burnt Oak) included within the centre, these provide a refuge from the traffic and allow for an improved pedestrian environment. A number of centres have had public realm improvements which has enhanced their appearance encouraging dwell time through the provision of cafes and restaurants with outdoor seating. In a number of centres, there is limited scope to improve the public realm (such as Golders Green and Finchley Church End) due to the relative narrowness of the pavements and the need to not restrict traffic on main arterial routes.
- 3.18 Investment activity is generally focused around the larger district centres. The TCFs and TCSs produced by LBB highlight the potential opportunities within the larger district centres. We discuss these in further detail in Section 9.
- 3.19 We have also noted that there a number of residential schemes being taken forward within a number of district centres (such as Whetstone), including conversions from offices to residential under the prior approval process or through new build activity. While this enables the regeneration of some key underutilised sites, it can also remove town centre uses from the centre.
- 3.20 Office to residential permitted development has had a significant impact on office floorspace in Barnet. A number of these schemes are promoting retail or town centre uses at ground floor level; however, there is limited control where conversions are taking place which is a concern. Where office activity is being lost or reduced, it is likely to reduce the daytime activity in these locations, being replaced by trips being generated at evenings and weekends.

Local centres

- 3.21 Table 3.3 shows the breakdown of uses in the 15 local town centres within LBB. Similar to the district centres, the geographic spread of local centres is largely concentrated towards the edges of the borough and particularly to the west and east of the borough and serving a significant residential population. The general pattern is a 'v' formation, again similar to the district centres, with West Hendon, Childs Hill,

Golders Green Road, Grahame Park, Deansbrook Road forming the western element. To the eastern side Market Place, Friern Barnet, New Southgate, Hampden Square, East Barnet Village and Great North Road for an arc of local centres predominantly situated on key junctions.

Table 3.3 Diversity of uses by unit – local and neighbourhood centres

Local Centre	Convenience		Comparison		Service		Vacant		Other		Total
	No. units	% units	No. units	% units	No. units	% units	No. units	% units	No. units	% units	
Apex Corner	1	3.3	9	30.0	18	60.00	1	3.3	1	3.3	30
East Barnet Village	8	10.0	17	21.3	49	61.3	6	7.5	0	0.0	80
Friern Barnet Village	6	10.3	9	15.5	41	70.7	2	3.4	0	0.0	58
Grahame Park*	-	-	-	-	-	-	-	-	-	-	-
Great North Road	4	10.0	6	15.0	27	67.5	2	5.0	1	2.5	40
Childs Hill Heath	5	7.5	16	23.3	36	53.7	10	14.9	0	0.0	67
Deansbrook Road	5	20.8	3	12.5	12	50.0	4	16.7	0	0.0	24
Golders Green Road	11	24.4	7	15.6	20	44.4	7	15.6	0	0.0	45
Hale Lane	5	11.9	7	16.7	27	64.3	1	2.4	2	4.8	42
Hampden Square	6	13.6	11	25.0	23	52.3	4	9.1	0	0.0	44
Holders Hill Circus	7	21.9	5	15.6	20	62.5	0	0.0	0	0.0	32
Market Place	6	9.8	14	23.0	30	49.2	9	14.8	2	3.3	61
West Hendon	13	15.5	17	20.2	37	44.0	17	20.2	0	0.0	84
Colney Hatch Lane	25	71.4	6	17.1	3	8.6	1	2.9	0	0.0	35
New Southgate**	12	66.7	2	11.1	3	16.7	1	5.6	0	0.0	18
LB Barnet Local Centre average	-	21.2	-	18.7	-	50.4	-	8.7	-	1.0	-
UK average	-	9.4	-	39.1	-	38.2	-	12.1	-	1.2	-

Source: Experian GOAD and PBA (2017) *Grahame Park is currently undergoing redevelopment including the provision of a new local centre. Therefore, the figures for this centre have not been included. **Shared with LB Enfield. Figures include all units situated within the town centre boundary where it is shared with a neighbouring borough.

3.22 Table 3.3 indicates that there is reasonable variety in the scale of the borough's local centres ranging from the smallest (New Southgate at 18 units) to the largest (East Barnet Village) at 80 units. This reflects the varying role and function of these local centres as well as factors including proximity to other centres, visibility on main

arterial routes, the level resident population locally and limitations of the built environment due to historic layout and configuration of the shop units.

- 3.23 The average of all LBB local centres in comparison to the UK national average reveals that the general pattern is for a higher level of convenience (22.2% compared to 9.4%) and service provision (50.4% compared to 38.2%). This is consistent with national trends which have seen gradual increases in both convenience retail and service provision. However, comparison retail provision on average in the Borough is noticeably lower than the UK average (18.7% compared to UK average of 39.1%). Again reflecting the district centre figures, the level of average level of vacancies in LBB's district centres (8.7%) is below the current UK national average (12.1%). This appears to show a broadly consistent pattern since the last assessment was undertaken 2010 TCFNA. However, care has to be exercised when considering averages as it can mask larger variations such as West Hendon (20.2% level of vacancies), Deansbrook Road (16.7% vacancies), Golders Green Road (15.6% vacancies) and Great North Road (14.6%) which are above the national average.
- 3.24 All of the local centres serve a localised function, serving a large resident population as well as pass-by trips pm the main arterial routes. In general, the layout and scale of Barnet's local centres is dictated by its built form. In most cases this is a purpose built parade of shops centred around key junctions or public transport hubs. Grahame Park is an exception to this being a purpose built local centre attached to a substantial housing estate. This is due to be demolished shortly and replaced with a new purpose built local centre, and therefore we have not reported figures in this instance.
- 3.25 The diversity of uses in Table 3.3 shows the dominance of the convenience and service sectors within the local centres, accounting for nearly three quarters of all units. As demonstrated in the health check assessments (Appendix B), this reflects the role of the local centres in providing for a range of everyday needs and services. The service sector has grown significantly taking up half of the total retail unit provision. Notable increases in service provision is centred around personal grooming such as hairdressers, beauticians and nail bars. The generally more limited scale of the local centres and regular retail unit size, limits the level of representation from multiple retailers who demand larger and more regular floorplates, albeit they tend to locate in larger centres where greater footfall can be achieved in any case.
- 3.26 Accessibility to local centres is good relative to their scale with all centres served by frequent public transport services. In most cases, public transport provision is by bus, though a small number of centres (West Hendon, Deansbrook Road and Holders Hill Circus) are within close proximity of either a railway or tube station. Most local centres have a PTAL rating of between two and four. Pedestrian accessibility is generally good across the centres, though similar to district centres those on major roads which bisect the centre create the perception of poorer accessibility.
- 3.27 Environmental quality is mixed, with those local centres on busy junctions suffering from noise and disturbance from traffic. However, as a proportion of footfall is generated in some of the local centres from pass-by traffic, there is an inevitable

tension in reconciling these two elements. Some local centres have wider pavements affording a buffer from traffic and allowing the provision of outdoor café seating.

- 3.28 Development opportunities within the local centres are generally more limited due to their close proximity to established residential areas. Therefore, most opportunities are redevelopment of areas within the centre rather than potential expansion. We noted a small number of longer term vacant units which could be redeveloped to provide purpose built retail units with residential uses above. Again these are limited due to the nature of the historic built form in most instances. Similar to district centres, there is pressure for residential redevelopment on the fringes of the local centres which may lead to their contraction in some instances. With the exception of Grahame Park, there are a limited number of pipeline developments in or on the edge of the local centres, with most being small scale redevelopments or changes of use.

Key findings

- Edgware is the largest centre in borough providing a wide range of retail shops including a substantial independent provision, alongside multiple retailers focused in the Boardwalk Shopping Centre. The centre also provides a substantial range of retail and other services as well as a range of cafes and restaurants as well as some leisure offer including drawing custom from residents in LB Harrow and LB Brent
- The average of all LBB district centres in comparison to the UK national average reveals a higher level of convenience (16.7% compared to 9.4%) and service provision (54.1% compared to 38.2%), reflecting their service centre role and also the growth of the convenience sector more generally
- Comparison retail provision on average in the borough is lower than the UK average (23.6% compared to UK average of 39.1%). Though proportionately well below the UK average, a reasonable range is still provided particularly where in-centre shopping centres are present
- The average level of vacancies in LBB's district centres (6.8%) is low, being approximately half the current UK national average (12.1%)
- A number of residential schemes being taken forward within the district centres (such as Whetstone), which is enabling the regeneration of some key underutilised sites; however, this also has the effect of reducing opportunities for redevelopment led by main town centre uses from the centre
- Office to residential permitted development has had a significant impact on office floorspace in Barnet. A number of these schemes are promoting retail or town centre uses at ground floor level; however, there is limited scope for the Council to control where conversions are taking place and can result in changes in the character and role of centres which is a concern
- The average of all LBB local centres in comparison to the UK national average reveals that the general pattern is for a higher level of convenience (22.2% compared to 9.4%) and service provision (50.4% compared to 38.2%).
- Comparison retail provision on average within local centres is noticeably lower than the UK average (18.7% compared to UK average of 39.1%) and the level of average level of vacancies in LBB's district centres (8.7%) is comfortably below the current UK national average (12.1%)
- Development opportunities within local centres are generally limited due to their proximity to established residential areas and typically constrained nature. Therefore, most opportunities are redevelopment of areas within the district and major centres rather than potential expansion of lower order centres

4 MARKET AND ECONOMIC TRENDS

Introduction

- 4.1 This study is being prepared during a renewed focus on the changing role and function of town centres. It is widely accepted that the traditional role of town centres has been undermined by the continued attraction of out-of-town retail and leisure locations, the growth in popularity of multi-channel shopping, the recent economic downturn and associated decline in expenditure growth. This section reviews the key trends in respect of retail and town centre uses. The second part of this section will summarise the headline economic forecasts which feed into the quantitative assessment of retail and other town centre needs in Sections 6 and 7.

Research

- 4.2 Since the recent economic downturn a considerable number of independent studies have been published considering the future role and function of town centres. Most notable of these are:
- The Portas Review (2011), Mary Portas
 - The Grimsey Review (2013), Bill Grimsey
 - Beyond Retail: Redefining the Shape and Purpose of Town Centres (2013) British Council of Shopping Centres
 - 21st Century High Streets (2013), British Retail Consortium
 - Accommodating Growth in Town Centres (2014), Greater London Authority
 - Digital High Street 2020 Report (2015), Digital High Street Advisory Board
 - Culture and Night Time Economy Supplementary Planning Guidance (2017), Greater London Authority
- 4.3 The key messages and recommendations from each of these studies are set out in the following paragraphs below. In summary, the wide-ranging recommendations proposed in these reports have two overall aims, namely:
1. To increase footfall and expenditure in town centres – in order to increase store turnover and improve vitality and viability of town centres.
 2. To reduce costs associated with operating and investing in town centres – to improve store turnover and to level the playing field between physical ‘bricks and mortar’ and online retail businesses.

The Portas Review

- 4.4 In May 2011, retail expert Mary Portas was appointed by the Government to lead an independent review into the future of the high street in response to the decline of town centres nationally, seen as a consequence of reduced spending on the high street. The report supported the call to strengthen planning policy in favour of ‘town

centre first' and includes 27 separate recommendations to tackle the further decline of the high street.

- 4.5 The core recommendations included measures to strengthen the management of high streets, improvements to the business rates system, reducing car parking charges, placing greater onus on landlords to proactively manage their assets or face the use of compulsory purchase powers by local authorities, and to increase community involvement in town centres.
- 4.6 The Government published its formal response to the Portas Review in 2012, which accepted virtually all of the recommendations and secured funding for 24 'Portas Pilot' towns to trial the recommendations. The Government established the future High Street Forum to implement Portas's recommendations and provided funding to establish business improvement districts (BIDs) and a 'Future High Street X Fund' (renamed the High Street Renewal fund) to reward towns delivering innovative plans to rejuvenate their town centres.

The Grimsey Review

- 4.7 Bill Grimsey, the former managing director of DIY chain Wickes and food retailer Iceland, published his report as an 'alternative response' to the recommendations of the Portas Review. The report made a total of 31 wide-ranging recommendations, including encouraging more people to live in town centres, appointing a High Streets Minister, and freezing car parking charges for a year.

Beyond Retail

- 4.8 Following the Portas Review, the Government supported the establishment of an industry task force to analyse retail property issues relating to town centres. The findings of the task force's report were presented in the Beyond Retail report.
- 4.9 One of the report's key observations was that the trend towards market polarisation has resulted in three broad types of town centre offer: strong centres with a wide retail and leisure offer; convenience food and service-based centres with an element of fashion and comparison goods; and, localised convenience and everyday needs-focused centres. The report makes a number of recommendations, including:
- Strong and dynamic leadership, led at the local authority level also including business and community involvement, to bring about long-term change in town centre functions;
 - Undertake bold, strategic land assembly, to assemble redevelopment opportunities of scale and worth;
 - Provide greater flexibility in the planning system to enable redundant retail premises to be converted to '*more economically productive uses*';
 - Consider the mechanisms to address funding gaps to encourage local authorities to commit to long-term planning for town centres;
 - Town centres must take advantage of technology to assist in marketing, driving footfall, and assisting independents and SMEs; and,

- Review of the business rate system and publishing of new retail valuation guidance.

21st Century High Streets

4.10 In 2013, the British Retail Consortium published the second ‘21st Century High Streets’ report as an update to the original report published in 2009. This sets out key policy recommendations to help secure ‘flourishing 21st Century high streets’ under six key topics:

- A unique sense of place: Local partnerships, authorities and retailers must create a brand for the town centre to engender consumer loyalty through differentiation and informative marketing.
- An attractive public realm: Local partnerships and authorities must actively manage the public realm creating attractive public spaces.
- Planning for success: Local authorities should develop a clear strategic vision focused on the role of the town centre and cooperate with neighbouring authorities to maintain viable and complimentary retail destinations.
- Accessibility: Local authorities should manage accessibility holistically and responsively and should provide adequate parking to assist in driving footfall.
- Safety and security: Local police should work with retailers to better understand the impacts of retail crime to promote town centres as safe, secure and effectively managed trading locations.
- Supportive regulatory and fiscal regimes: Central government should reform the Business Rate Multiplier to reduce the cost of operating and investing in town centres.

Accommodating Growth

4.11 The GLA jointly commissioned PBA, Maccreanor Lavington architects and Graham Harrington to investigate how London town centres can be successfully intensified to accommodate the growing demand for housing.

4.12 The report explains that fundamental structural changes in the retail sector have had the effect of reducing demand for retail floorspace in some of London’s town centres. These structural changes are explained in detail in Section 3.3 and include: a shift towards value retailers at the expense of established retailers; a shift towards small convenience stores and away from large hypermarkets; growth in online retailing; polarisation in performance between large and small centres; and the increasingly important role of commercial leisure.

4.13 This trend presents an opportunity for London’s town centres to accommodate growing demand for housing in two ways: firstly, by creating more capacity and secondly by enhancing rates of housing delivery. The London SHLAA identified 54% of housing capacity on larger sites in and around town centres, although the report explains that residential capacity can be further increased by:

- Including sites currently excluded from the SHLAA and boroughs' development plans due to fragmented ownership constraints could generate an additional 3,000 dwellings pa.
- Increasing yields on currently identified town centre sites by increasing densities could provide an estimated 1,900 dwellings pa.
- This opportunity is crystallised in London Plan Policy 2.15 'Town Centres' Part A, which states that London's town centres should provide:

'the main foci beyond the Central Activities Zone for commercial development and intensification, including residential development' (emphasis added)

Digital High Street

4.14 The Digital High Street Advisory Board was established following the work of the Future High Streets Forum to consider the revolutionary impact of digital technologies on future success of high streets. The report makes four principal interrelated recommendations that are critical to the revitalisation of high streets in the impending digitally dominated world. These include the following:

- **Internet infrastructure:** raise connectivity standards for residences and business by 2020 and provide clear consistent public access WIFI standards for consumers between venues and providers to increase deployment of digital technology.
- **Digital skills:** eliminate 'digital skills gap' in communities among residents, employees and business owners.
- **High street digital lab:** a platform for digital consumer services which functions as a central resource for digital training programmes and provides widely available digital technology.
- **High street digital health index:** adopt the index concept as a method for the Government to assess the competitiveness of high streets, measure the economic value creation from digital developments, set goals for digital integration and inspire local governments and enterprises to adopt digital technologies.

Culture and Night Time Economy

4.15 The Greater London Authority consulted between April and June 2017 on draft supplementary planning guidance (SPG) concerning the night time economy across London. This is part of a wider initiative on the night time economy and is also intended to tackle notable recent losses of pubs and clubs across London. In 2016 the Mayor of London announced the appointment of the first 'Night Tzar' and in 2018 the Mayor will publish a Cultural Investment Plan to support London's cultural venues, places and spaces.

4.16 The SPG seeks to support and enhance the night-time economy while recognising a balanced approach is required to proactively manage the huge variety of night time activities and events undertaken across London.

4.17 The key elements of the draft SPG are:

- Promoting a wider range of evening and night time activities in town centres such as extension to opening hours of daytime facilities and service to act as bridges between the day and night time economy;
- Recognise, improve and manage the Central Activities Zone (CAZ) in London where night time activities are concentrated;
- Outer boroughs should consider the creation of 'cultural quarters' to achieve a cluster of evening and night time locations generating additional activity alongside Strategic Cultural Quarters;
- Encourage boroughs to use of Article 4 directions to remove permitted development rights for pubs where it is a viable and valued community asset;
- Guard against the unnecessary loss of social, recreational and cultural facilities particularly where they meet the needs of particular community groups; and
- Proposed introduction of an 'agent of change' rule which will ensure that new development does not unduly add to the costs and administrative burdens of existing businesses.

Market trends

4.18 In this section, the key changes in the retail and leisure market that are considered likely to have the most significant implications on town centres are discussed. The key trends include:

- Polarisation trend
- Restructuring of the convenience (food) sector
- Growth of commercial leisure sector
- Effects of digital technology

Polarisation

4.19 Since the last economic downturn a number of factors have created a need for retailers to rapidly adapt their business strategies and store formats to economic changing circumstances. These factors include:

- Reduced consumer expenditure growth
- Changes in customer requirements
- Growth of internet and 'multi-channel' retailing

4.20 The culmination of these factors resulted in a 'polarisation trend' in the comparison sector whereby retailers have increasingly concentrated trading activities within larger retail centres and out of town retail parks. As a result, there is a growing disparity between the comparison retail offer in larger centres (which generally continues to improve) and that within smaller centres (which generally experience decline in comparison retail provision).

4.21 Retailers have altered their business models in this way in order to compete with internet based retailers which have significantly lower overhead costs. Operating a strategic network of large stores in larger centres with capacity to stock full product

ranges provides greater efficiency compared to a network of smaller-format stores which offer a limited range of products. The growing popularity of multi-channel retailing means that many retailers now require fewer stores than before to reach their customer base. In 2011, Deloitte estimated that the polarisation trend could result in portfolio reductions of between 30 to 40% in the short to medium term in certain retail categories². While click and collect purchases in town centres assist in providing activity in physical stores, this has not reversed the polarisation trend amongst multiple comparison retailers.

- 4.22 National retailers have become increasingly concentrated within the larger regional 'top 100' centres and the share of comparison retail sales conducted through town centre shops declined from 64% in 2002 to just over 40% by 2013³. The main beneficiaries of this trend have been out of town retail parks.
- 4.23 Retailers are increasingly looking to out-of-town retail parks to meet the demand for large format units. The retail warehousing market has seen increasing demand from traditional high street retailers since these units are considered best placed to serve the multi-channel customer. Key anchor retailers have continued to invest in new large format stores in out of centre locations such as John Lewis at Home and Next Home. These larger stores display their full range of products and provide click and collect facilities in accessible locations. Retail unit floorplates in town centres are generally more constrained.
- 4.24 Increased demand for out of centre floorspace has reduced vacancy levels down to pre-recession levels. Due to a shortage in new space, landlords are focusing on improving the quality of existing retail parks through refurbishment and the introduction of a greater range of uses, including leisure. As a result, retail parks are becoming destinations in their own right offering customers an enhanced shopping experience⁴. However, not all retail parks have prospered with a number of older and less accessible retail parks now being considered for residential redevelopment: Pentavia Retail Park is an obvious example within LBB.
- 4.25 The retail development pipeline has slowed and 2012 saw the lowest quantum of new floorspace delivered in the UK since the 1990s. However, since 2012, a number of major retail schemes opened including Trinity Shopping Centre in Leeds owned by Land Securities in 2013; Old Market in Hereford owned by British Land in 2014; and, Grand Central in Birmingham owned by Birmingham City Council in late 2015⁵. Openings in 2017 include the Lexicon in Bracknell (Bracknell Regeneration Partnership), Victoria Gate in Leeds (Hammerson) and Bond Street in Chelmsford (Aquila Holdings)⁶.

² Deloitte LLP, The Changing Face of Retail (2011)

³ Peter Brett Associates, Investing in the High Street: Town Centre Investment Management (2013)

⁴ Colliers International, Heading out of town-the changing landscape of the retail warehousing market (2016)

⁵ BCSC (2013) Shopping Centre Development Pipeline Report

⁶ Cushman and Wakefield (2016) UK Shopping Centre Development Report

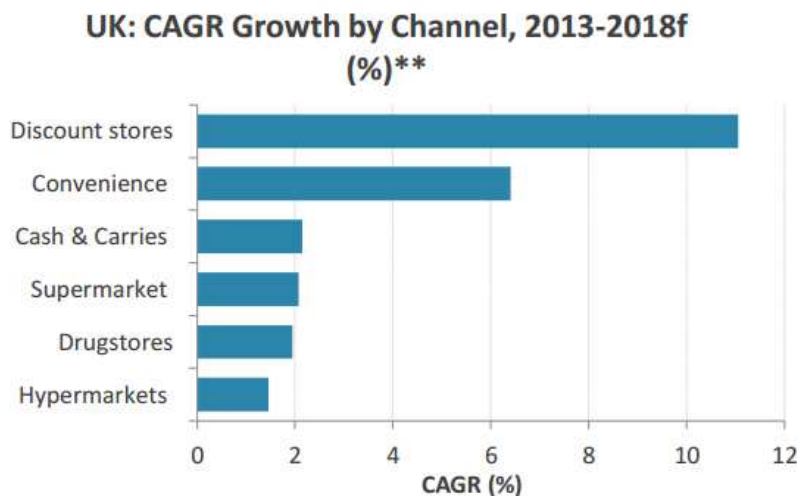
4.26 The scale and type of investment is different to that experienced during the ‘golden age’ of shopping centre development, between 1997 and 2007. In line with the polarisation trend, investment in new comparison retail floorspace is becoming increasingly concentrated in the larger city centres and regional shopping centres.

Restructuring of the convenience sector

4.27 During the economic downturn the convenience goods sector was a key driver of growth. This sector has traditionally been dominated by the ‘Big Four’ supermarket operators: Asda, Morrison’s, Tesco and Sainsbury’s and large foodstores (2,300 sqm net) were the primary driver of growth in the sector. However, structural changes have taken place in the sector, as follows:

- Discount food operators: operators such as Aldi and Lidl have increased their market share of the grocery market significantly and are continuing to expand
- ‘C-format’ stores: major grocery retailers have expanded their network of smaller convenience stores in order to increase their market share (Tesco Express, Sainsbury’s Local and Little Waitrose)
- Online shopping: the ‘race for space’ over the last decade has resulted in major operators investing in online grocery shopping in order to increase market shares.

Figure 4.1 UK Grocery operators’ growth 2013-2018



Source: Planet Retail, European Grocery Retailing (2016)

4.28 Discount retailers are now important forces in the convenience goods market and are expected to continue to take market share from the Big Four supermarket operators.

4.29 As shown in Figure 4.1, between 2013 and 2018 the compound annual growth rate (CAGR) of discount retailers (such as Aldi and Lidl) and convenience (C-format stores) is expected to reach 11% and almost 7% respectively whereas the growth rate among supermarkets is forecast at just 2%.

4.30 Verdict expects that the proportion of floorspace accounted for by ‘smaller stores’ will increase from 37.6% in 2007 to 41.6% by 2017. This shift has been driven by a change in consumer behaviour; shoppers are undertaking an increased number of

smaller ‘top-up shopping’ or ‘basket shopping’ trips instead of a weekly food shop to a large out of centre foodstore. This trend has been exacerbated by the growth of online grocery shopping, as customers undertake top-up shopping to supplement the main grocery delivery.

- 4.31 Convenience operators’ business models have shifted towards the expansion of smaller ‘C-format’ stores. Both Sainsbury’s and Tesco now have more ‘C-stores’ than large supermarkets. In January 2015, Tesco announced they would abandon the development of 49 ‘very large’ foodstores and close 43 unprofitable stores. Both Sainsbury’s and Morrison’s have also withdrawn from a number of large development schemes.

Growth of the commercial leisure sector

- 4.32 Most commentators predict that commercial leisure, such as cafes, bars, restaurants and cinemas, will constitute a growing share of town centre floorspace. These key trends include⁷:

- Cinema sector: expected to expand via acquisition and diversification of the market despite falling attendance figures over the last two years. The big three cinema operators (Vue, Odeon and Cineworld) are focusing on larger markets where there is limited competition. The second tier boutique operators and independent operators are focusing on the qualitative difference in their offer to enable them to create specialist markets (such as the Phoenix Cinema, East Finchley).
- Restaurant sector: contributed significantly to the continued growth of the leisure sector throughout and since the recession. Demand for A3 space is being driven by the regional expansion of successful A3 operators established in Central London.
- Health and fitness: the market is expected to experience continued growth in market value with annual memberships increased from 12.6% to 13.2% and 177 new facilities opened in the year up to 2014 predominantly in the budget sector.
- Class D2 leisure use (Children’s Play): resurgence from the large format D2 leisure operators since the last economic downturn. Operators are offering increasingly diverse activities (e.g. laser combat, climbing and trampolining) as a result of consumer’s spending more disposable income on leisure-based activities.
- Hotels (Class C1 use): Brexit and the consequent weakness of the pound has strengthened demand from overseas for hotel accommodation with PWC⁸ forecasting a 2.4% growth in the average daily rate for hotel rooms and a 0.9% growth in room occupancy across Greater London. However, the level of growth is modest and further potential growth is dependent on future economic growth of the UK in relation to domestic hotel visits. Recent growth in hotel accommodation

⁷ Savills (2015) UK Commercial Market in Minutes, Savills World Research

⁸ PWC, UK hotels forecast 2017 and 2018.

has concentrated on national and international operators such as Travelodge, Premier Inn, Holiday Inn and the Ramada Group of hotels, in many cases as part of wider mixed use developments with good accessibility to key transport nodes.

- 4.33 When considering leisure expenditure available to households, spending on food and drink typically accounts for more than 50% of total leisure spending, compared to around 15% on 'cultural services' (e.g. going to the cinema, theatre, art galleries or live music) and under 10% on hotels, 'games of chance'⁹ and recreation/sporting services.
- 4.34 There is scope for town centres to capitalise on this trend, redefining their function as leisure 'destinations' in their own right. The development of a strong commercial leisure offer can help to increase footfall, particularly outside of retail hours, and visitors undertaking 'linked trips' between retail, leisure and other uses also spend increased dwell-time in centres. However, increasing competition from out of town stores and retail parks is now also occurring within the commercial sector, with numerous extensions being planned for A3, A4 and D2 uses. A recent example is the substantial expansion of food and drink offer at Meadowhall and of course the new Brent Cross proposals also has a substantive element of commercial leisure uses as part of the overall mix of uses. This trend could again put pressure on the longer term level of commercial leisure uses.

Effects of digital technology

- 4.35 The rapid uptake of digital technology in the retail sector has facilitated the growth of online sales which has had a noticeable impact on the built environment in terms of the ways in which retailers utilise physical floorspace.
- 4.36 The increased threat posed by internet retailing has prompted many National retailers to adopt new business strategies. In the non-food sector, the most competitive retailers have rationalised their property portfolios and focused new investment in online retailing (web development, mobile retailing and click and collect including Amazon Lockers and Doodle shops) in order to boost the efficiency of their operations.
- 4.37 Property portfolio rationalisation has resulted in many retailers closing smaller less profitable stores, typically in smaller district centres and concentrating investment in building a smaller network of large stores in larger shopping destinations from major centres upwards together with substantial new developments such as Westfield London and Stratford.
- 4.38 Experience has shown that retailers who have invested in multi-channel retailing have proved most successful in recent years. Multi-channel retailing includes a digital online retail presence complemented by physical stores located in a range of accessible and attractive locations. Some retailers are increasingly utilising digital

⁹ Games of chance covers a wide range of games whose outcome depends upon an element of chance, even though skill of the contestants may also be a factor influencing the outcome. A game that involves anything of monetary value, or upon which contestants may wager money is considered to be gambling.

technology in order to drive footfall and in-store purchases. Examples of such practices include:

- in-store handheld internet devices: to provide customers with detailed product information and enable online ordering;
- geo-referencing: sending information to customers’ mobiles about offers and promotions when they pass close to a store; and,
- mobile loyalty card programmes: allow offers to be tailored to individuals shopping habits.

4.39 These developments help to ensure that town centres remain a focus for retailing uses despite the significant rise in online sales and other out of centre shopping centres and standalone stores. Innovative approaches to fulfilment of customer orders and other retail needs is essential to maintaining footfall which otherwise will be lost.

Economic trends

4.40 This section provides an overview of key retail and leisure forecasts taken from the latest Experian Retail Planner Briefing Note (ERPBN14) including expenditure growth, multi-channel retailing and floorspace efficiency growth, which inform the estimates of expenditure capacity set out in Section 6.

Expenditure growth

4.41 The UK referendum result, to leave the EU, has created major economic uncertainty in the short-term which is expected to take a toll on investment and hiring plans while the recent decline in sterling will result in higher inflation. According to Experian, this combination of slower employment growth and higher inflation is expected to reduce retail sales growth to just 1% in the short-term (2017-2018).

4.42 Table 4.1 below **Error! Reference source not found.** shows the forecast growth for convenience, comparison and leisure spending per capita for five distinct periods; pre-recession (1997-2007); the recession and its aftermath (2008-2011); the recovery (2012-2015); medium-term forecast (2016-2025) and long-term forecast (2026-2035). This allows for an easy comparison of historic and long-term trends.

Table 4.1 Summary of long-term retail growth prospects

Growth per capita	Annual average growth (%)				
	1997-2007	2008-2011	2012-2015	2016-2025	2026-2035
Period	1997-2007	2008-2011	2012-2015	2016-2025	2026-2035
Total retail	5.1	-0.5	2.1	1.8	2.4
Convenience	-0.3	-3.2	-1.0	-0.1	0.1
Comparison	8.0	0.6	4.1	2.7	3.2
Leisure	-0.9	-3.3	1.7	1.2	1.5

Source: Figures 1 and 2, ERPBN14 (November 2016)

- 4.43 In the short term, retail spending growth will slow sharply as a result of economic uncertainty related to the Brexit vote according to Experian. Convenience retail spending is forecast to slow from 0.0% in 2016 down -0.9% in 2019 and comparison retail spending growth is expected to slow from 3.3% in 2016 down to 1.0% in 2018. Leisure spending is also expected to slow quickly from 1.9% in 2016 down to 0.2% in 2018.
- 4.44 Retail sales volumes are expected to recover in the medium-term as Brexit-related uncertainty subsides which is reflected in the higher retail spending growth rates forecast from 2016-2025 as shown in Table 4.1. It should be noted that this scenario from Experian assumes an orderly transition process with continued access to the EU single market.
- 4.45 In the long-term, forecast growth in retail sales per capita will recover to reach 2.4% although this is well below the historic pre-recession rate of 5.1% for the reasons set out above. The failure of the convenience sector to post a sustained recovery in recent years despite the strengthening of household finances has resulted in Experian's long-term growth forecasts remaining subdued over the long term (0.1%). Experian's long term comparison growth forecast will remain significantly lower than the pre-recession period (8.0%) due to the economic constraints posed by Brexit and the ongoing need for fiscal restraint.
- 4.46 Medium to longer term trends are difficult to predict and estimates will be revised as updated datasets are published. However considerable uncertainty is still present as Brexit negotiations with the EU are ongoing and will continue throughout 2018 and 2019.
- 4.47 Leisure spending is forecast to perform well in the long-term compared to historic trends as shown in Table 4.1. Experian expect that spending will reach 1.5% in the long-term (2026-2035) which is a reversal of the historic trend of declining per capita leisure expenditure.

Multi-channel retailing

- 4.48 Multi-channel retailing is when a company provides numerous ways for customers to purchase goods and services. This includes sales through traditional brick-and-mortar stores, internet derived sales (including click and collect purchases), shopping channels and sales through mail order/ catalogues.
- 4.49 Special Forms of Trading (SFT), driven by the increasing popularity of internet shopping, has significantly outpaced traditional retail sales in recent years and Experian forecast that it will continue to do so for several years to come. SFT data is collected by the ONS and includes all non-store retail sales (internet, catalogue, outdoor markets, telephone sales and door to door).
- 4.50 SFT now accounts for 15% of all retail sales and the growth of SFT over the last decade has been driven by the increasing popularity of online shopping. Internet sales have been rising much more rapidly than general retail sales in recent years. The share of internet sales as a share of total retail sales increased significantly from 4.7% in June 2008 to 14.0% in mid-2016 (unadjusted figures).

4.51 Experian expect that the growth of SFT retailing will outperform traditional forms of spending. The unadjusted SFT share of retail spending is forecast to reach 18.6% by 2022 and 20.4% by the mid-2030s. The continued growth of internet retailing over this period will be sustained by the uptake of new technology, such as mobile shopping and interactive TV shopping. Table 4.2 sets out Experian’s adjusted SFT market share growth forecasts up to 2035, taking into account SFT sales from stores.

Table 4.2 Adjusted SFT market shares (%)

	2016	2018	2026	2031	2035
Total SFT	9.6	10.6	12.7	13.3	13.8
Comparison	13.2	14.4	16.1	16.3	16.5
Convenience	3.0	3.4	4.6	5.0	5.3

Source: Figure 5, ERPBN14 (November 2016)

4.52 The rise of internet retailing has changed how retailers utilise traditional retail outlets and internet retailing is now seen as both a threat and an opportunity to businesses.

4.53 The growth in online sales has generally had the most negative impact on those sectors which are more exposed to the digitisation of products and services, such as electrical goods, books and music. As a result, the number of retailers selling these products from ‘bricks and mortar’ stores has reduced over recent years.

4.54 The failure of retailers to adapt to new shopping habits and to develop a complimentary online shopping platform has led to the high profile closure of national retailers including Woolworths, Blockbuster and BHS. However, retailers which have adopted a successful multi-channel shopping offer are expected to see increasing demand for ‘bricks and mortar’ stores driven by online sales growth. Multi-channel retailing refers to an integrated shopping offer whereby retailers utilise traditional stores as a showroom for products, a service location and a collection/drop off point for online orders. Receiving specialised product information and the opportunity to view, compare and test products before purchase is becoming increasingly important to customers and this trend will continue to support demand for retail floorspace.

Sales density growth

4.55 Sales density growth, also referred to as floorspace efficiency growth, refers to the ability of retailers to achieve increases in their turnover year on year that exceed inflation. It is important for retail assessments to take this into account since it allows for a certain amount of expenditure growth to be ‘ring-fenced’ to be spent within existing businesses. This is also important for retailers to remain viable over time.

4.56 Conventionally, retail capacity assessments make an allowance for the year on year growth in average sales densities of existing floorspace as a claim on expenditure growth. Since there is limited evidence on annual turnover growth achieved by retailers it has been necessary to make informed assumptions about sales density growth in the convenience and comparison sector based on data provided by industry bodies, Experian and Pitney Bowes.

- 4.57 The quality and configuration of floorspace will determine its ability to achieve sales density growth. Modern large format retail units have greater potential to grow its sales density year on year compared with small traditional shop units. In the comparison sector, a range of expenditure growth rates are applied from 2016 onwards depending on the nature of the property offer, as follows:
- High (2.5%): locations with a significant proportion of modern retail property or a high quality retail offer (i.e. premium retailers);
 - Medium (1.9%): locations with a mix of modern and older retail properties and a mixed retail offer; and,
 - Low (1.5%): locations with a significant proportion of older retail properties or a low quality retail offer (i.e. discount stores)
- 4.58 This is a PBA estimate which is considered to be consistent with the long-term year-on-year expenditure growth forecast at around 2.0% by Experian.
- 4.59 The ability for the convenience sector to improve its turnover year on year is restricted due to the high trading levels that already exist relative to the comparison sector. Experian forecast negative growth rates in the convenience sector up to 2024 when growth will resume at just 0.1% from 2024-2035. For these reasons, PBA have not allowed for the existing floorspace to improve its turnover year-on-year.

Key findings

This study has identified a number of market trends which are likely to influence the demand for new retail and commercial leisure floorspace across the plan period:

- **Polarisation to higher-order centres:** National comparison retailers are increasingly rationalising their property portfolios with fewer large stores concentrated in high order centres, shopping malls and regional centres.
- **Restructuring of the convenience goods sector:** Since the economic downturn major retailers have increased their network of small in-centre stores and invested in online shopping while discount food operators such as Aldi and Lidl have increased their market shares.
- **Growth of commercial leisure sector:** Commercial leisure uses will constitute a growing share of town centre floorspace driven in part by the increase in household leisure expenditure and reduced demand for retail space in secondary centres.
- **Effects of digital technology:** Digital technologies facilitating online sales have altered the ways in which retailers utilise physical floorspace and it is likely that new technologies will impact on the retail sector in **unpredictable** ways.

This study has also identified a number of quantitative forecasts which will inform the assessment of need set out in Sections 6 and 7:

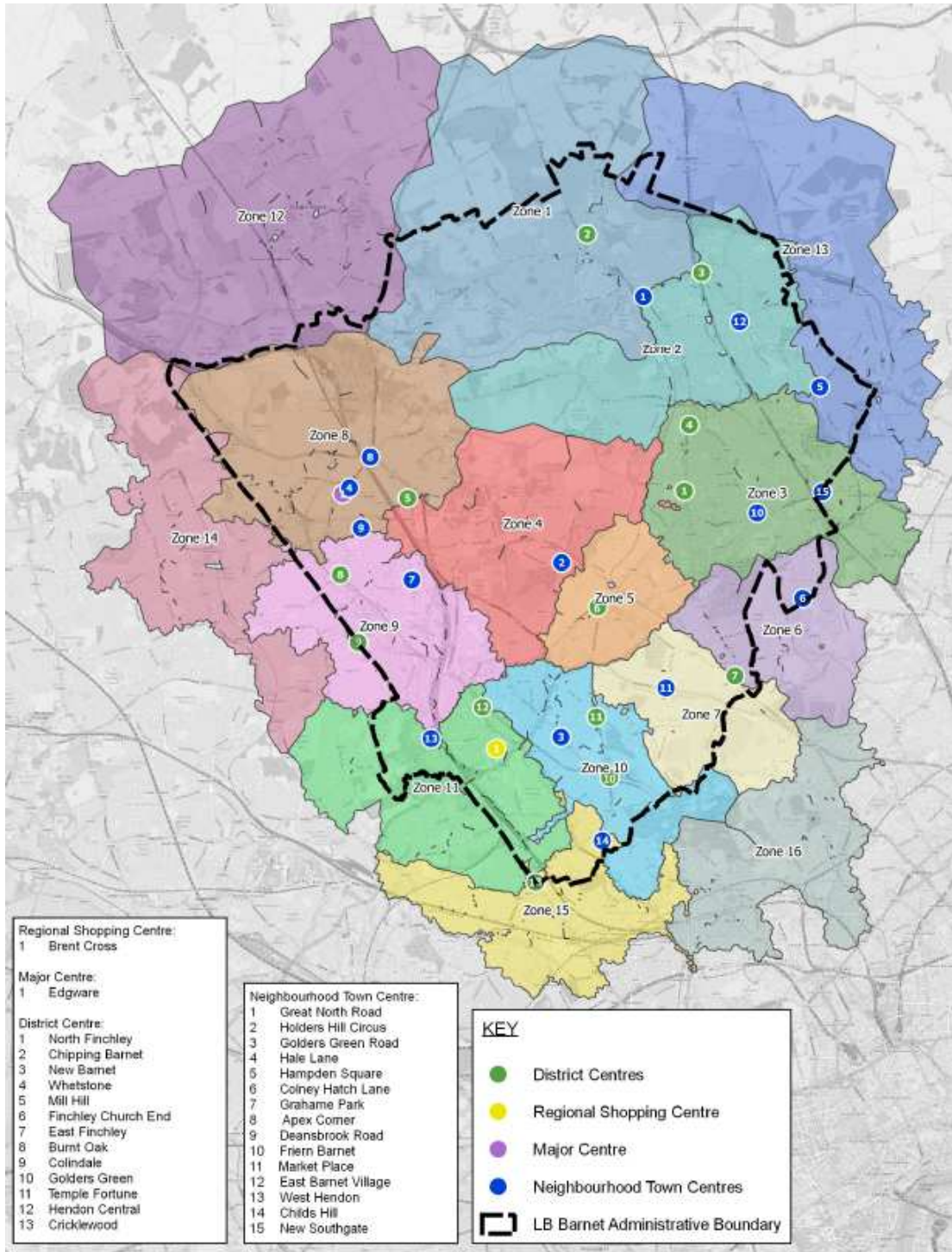
- **Retail expenditure growth:** Experian estimates a growth rate of 3.1% per annum between 2016 and 2035 for comparison goods. Convenience expenditure is expected to grow extremely modestly over the same period (0.1% per annum).
- **Leisure expenditure growth:** Experian forecasts growth rate at 1.4% per annum between 2016 and 2035 for leisure.
- **Sales density growth:** PBA assume a range of efficiency growth rates for existing comparison floorspace from 1.5% to 2.5% per annum but no growth for existing convenience floorspace.
- **Growth in e-commerce/m-commerce:** Experian forecast that growth in non-store retailing will outperform traditional retailing although only moderately after mid-2020. Rapid growth forecast in the short term (2015-2019) will be sustained by new technology, such as purchasing through mobile devices.

5 RETAIL SPENDING PATTERNS

Introduction

5.1 The results from the household telephone survey are used to identify patterns of comparison and convenience retail and leisure spending.

Figure 5.1 Study area and study zones



Source: PBA (2017)

- 5.2 The study area (see Appendix C) adopted for the household telephone survey, also shown in Figure 5.1, relates closely to LBB boundary but also extends to include parts of the neighbouring boroughs of Brent and Harrow to the west; Camden to the south; Enfield and Haringey to the East; and Hertsmere district to the north. The wider study area has been adopted to identify the role of LBB’s centres within the London retail network and establish the core catchment of each centre.
- 5.3 The study area zones are similar to those surveyed in 2008 for the previous LBB TCFNA which also allows us to assess how the performance of LBB centres has changed over the last nine years.
- 5.4 The study area is divided into 16 zones made up of a number postcode sectors; they are consistent with the study zones adopted in the 2009 LBB. The 16 study zones which form the basis of the analysis are set out in Table 5.1. Study zones 1-11 relate most closely to the LBB boundary and when discussing shopping patterns LBB refers to zone 1-11 only.

Table 5.1 Study zones by local authority

Zone	Centre	Authority
1	Chipping Barnet	Barnet / Hertsmere
2	Whetstone/New Barnet	Barnet
3	North Finchley	Barnet / Haringey
4	Mill Hill	Barnet
5	Finchley Church End	Barnet
6	East Finchley	Barnet
7	Temple Fortune	Barnet / Haringey
8	Edgware	Barnet
9	Colindale / Burnt Oak	Barnet / Brent / Harrow
10	Golders Green	Barnet / Camden
11	Brent Cross	Barnet
12	Borehamwood	Hertsmere
13	Southgate	Enfield
14	Stanmore	Harrow
15	Kilburn / West Hampstead	Camden
16	Hampstead	Camden

Source: PBA 2017

- 5.5 Within the study area, 100 surveys were completed in each of the sixteen study zones providing a total of 1,600 household surveys. Questions were asked on convenience, comparison and leisure spending. The raw survey data is provided in Volume 2.
- 5.6 Weightings are applied to the answers to achieve a composite market share for spending on convenience and comparison goods. This informs quantitative

assessment of retail needs. The quantitative assessment tables are provided at Appendix H , and the key data inputs and assumptions are shown in Appendix I The method applied to calculate spending patterns is similar to that used in the 2009 LBB in order to ensure that comparison can be drawn between the 2009 and 2017 household surveys.

Spending patterns

- 5.7 The data on spending patterns can be found in Tables 4a and 4b for comparison and convenience goods respectively in Appendix H . This follows a standard step by step approach, by first calculating existing expenditure in 2017 and then distributing this spending to destinations based on the results from the telephone household survey. The results of the household survey are considered in the remainder of this section

Comparison goods

- 5.8 Table 5.2 summarises for LBB as a whole the amount of comparison spending which is retained within LBB (retained expenditure) and how much expenditure is leaked to other destinations outside of LBB (expenditure leakage). The table also shows the amount of comparison spending which is drawn from zones within the study area but outside of LBB (inflow).

Table 5.2 LBB comparison spending patterns in 2017

Comparison spending patterns	%	£M
Turnover retained in LBB zones	69%	£1,065
Turnover derived from elsewhere in study area	18%	£275
Leakage from LBB zones	31%	£477

Source: PBA based on NEMS Household survey (May 2017)

- 5.9 LBB is considered to have a strong comparison retention rate, at 69%, particularly given the diverse retail offer in London. The main competing destinations are Central London and destinations within neighbouring boroughs which are both easily accessible to residents of LBB by public transport and include Borehamwood, Enfield, Harrow and Watford; and to a lesser extent Camden, Wembley, Westfield London and Wood Green.
- 5.10 PBA have undertaken an analysis of the trade draw of each district centre in the LBB as well as Edgware major centre and Brent Cross shopping centre. The comparison trade draw maps (Appendix D) show the proportion of each centres turnover that is drawn from each zone in the study area. Comparing the maps highlights the ability of the different centres to attract spending from beyond its immediate catchment. The headline observations from the trade draw analysis are summarised below:
- **Brent Cross:** draws trade from an extensive catchment area and attracts spending from all zones in the study area. The household survey results indicate

that Brent Cross is the dominant comparison destination in the LBB and fulfils its function as a regional shopping centre

- **Cricklewood, East Finchley, Edgware, Hendon, New Barnet, North Finchley, Temple Fortune and Whetstone:** between 30 and 40% of comparison retail turnover in these centres is drawn from their home zones however they also draw a significant amount of trade from neighbouring study zones. The household survey results suggest that these centres perform an important local shopping function in the hierarchy but also act as a comparison shopping destinations for residents located further afield.
- **Burnt Oak, Chipping Barnet, Colindale, Finchley Church End, Golders Green and Mill Hill:** 50% or more of comparison retail turnover is drawn from their home zones. The household survey results indicate that these centres perform a more localised shopping function in the retail hierarchy and mainly cater to the local population.

5.11 Comparison market share maps (Appendix E) have been prepared for the following LBB destinations: Brent Cross, Edgware, North Finchley as well as competing centres. The maps illustrate the level of influence each /destination has over residents shopping patterns in the study area based on the results of the 2017 household survey. The headline observations for each destination are summarised below:

- Brent Cross: the core catchment area (30% market share or greater) extends across six study zones (zones 11, 10, 7, 4, 5 and 6). Brent Cross has a market share of 50% or more in its home zone (11) as well as zone 10, 7 and 4 which are all located within the LBB.
- Edgware: the core catchment area (20% market share or greater) is confined to Zone 8 which is Edgware's home zone. Edgware also has a reasonable level of influence over shopping patterns in the adjoining zones 14 and 19 which cover LBB and parts of LB Harrow.
- North Finchley: the core catchment area (20% market share or greater) is confined to Zone 3 which is also North Finchley's home zone. North Finchley also exerts a reasonable level of influence over shopping patterns in the adjoining zone 5 with a market share of above 10%.
- Borehamwood: the centre generally does not exert a significant level of influence over shopping patterns in LBB except for zone 1 which includes parts of Barnet and Hertsmere. The core catchment area (20% market share or greater) is confined to Zone 12 which is Borehamwood's home zone.
- Central London: central London has moderate levels of influence over shopping patterns in LBB with a market share of between 5-20% with the LBB zones.
- Enfield: the centre does not exert a significant level of influence over shopping patterns in LBB. The core catchment area (20% market share or greater) is confined to zone 13 located within the LB Enfield.

- Harrow: the centre does not exert a significant level of influence over shopping patterns in LBB. Across the study area Harrow has the greatest level of influence on zone 14 in the LB Harrow.
- Watford: the centre generally does not exert a significant level of influence over shopping patterns in LBB except for zone 8 in the LB Enfield.
- Westfield London: generally, does not exert a significant level of influence over shopping patterns in LBB. Across the study area, Westfield has the greatest level influence over shopping patterns in zone 14 in the LB Harrow.

5.12 As expected, comparison goods spending patterns within Barnet itself are dominated by Brent Cross due to the significant concentration of national multiple comparison retailers. The shopping patterns for Edgware and North Finchley centres also demonstrate a wider influence, attracting market share from both their home zones and immediately adjoining zones.

Changes since the LBB TCFNA 2010 Update

- 5.13 PBA have undertaken a comparison of the 2008 household survey and the 2017 household survey data. Figures 1-3 and Tables 1-3 (Appendix F) show how the comparison market shares achieved by Brent Cross, Edgware and North Finchley have changed over the last nine years. The key findings are summarised below:
- Brent Cross: in the core catchment area (zones 11, 10, 7, 4, 5 and 6) Brent Cross has decreased its market share in 3 zones (zones 4, 5, and 10) and increased its market share in 3 zones (zones 6, 7 and 11) but there has not been a significant change in any zone.
 - Edgware: in its core catchment area (zone 8) Edgware has increased its comparison retail market share from 14.2% to 20.0%.
 - North Finchley: in its core catchment area (zone 3) North Finchley has increased its comparison retail market share from 13.3% to 23.0%.
- 5.14 In summary, the comparison market share achieved by North Finchley and Edgware increased significantly between 2008 and 2017 within their respective core catchment areas. However, the comparison market share achieved by Brent Cross in its core catchment area has stayed relatively stable since 2008.
- 5.15 Table 3 at Appendix D compares the comparison turnover of LBB destinations and competing centres in 2008 and 2017 in monetary terms. According to the survey data the comparison trade draw (or turnover) of both Edgware and North Finchley has increased significantly since 2008, equivalent to a 58% and 56% increase respectively. The comparison turnover of Brent Cross has increased although not to the same extent, equivalent to an 18% increase since 2008.
- 5.16 Table 4 at Appendix D compares the trade draw of LBB destinations and competing centres in 2008 and 2017 in percentage terms; this shows the turnover of each destination as a proportion of the study area total comparison turnover. According to the survey data the comparison trade draw of Edgware and North Finchley has

increased by 1.0% and 0.8% respectively whereas the trade draw of Brent Cross has decreased by 0.1%.

- 5.17 In summary, the comparison turnover of both North Finchley and Edgware has grown significantly since 2008 although the turnover of Brent Cross has not grown to the same extent. The survey results indicate that the performance of North Finchley and Edgware as comparison destinations has improved significantly since 2008 while the performance of Brent Cross has stayed relatively stable.

Convenience goods

- 5.18 Table 5.3 below summarises for LBB as a whole the amount of convenience spending which is retained within LBB (retained expenditure) and how much expenditure is leaked to other destinations outside of LBB (expenditure leakage). The table also shows the proportion of convenience spending which is drawn from zones within the study area but outside of LBB (inflow).

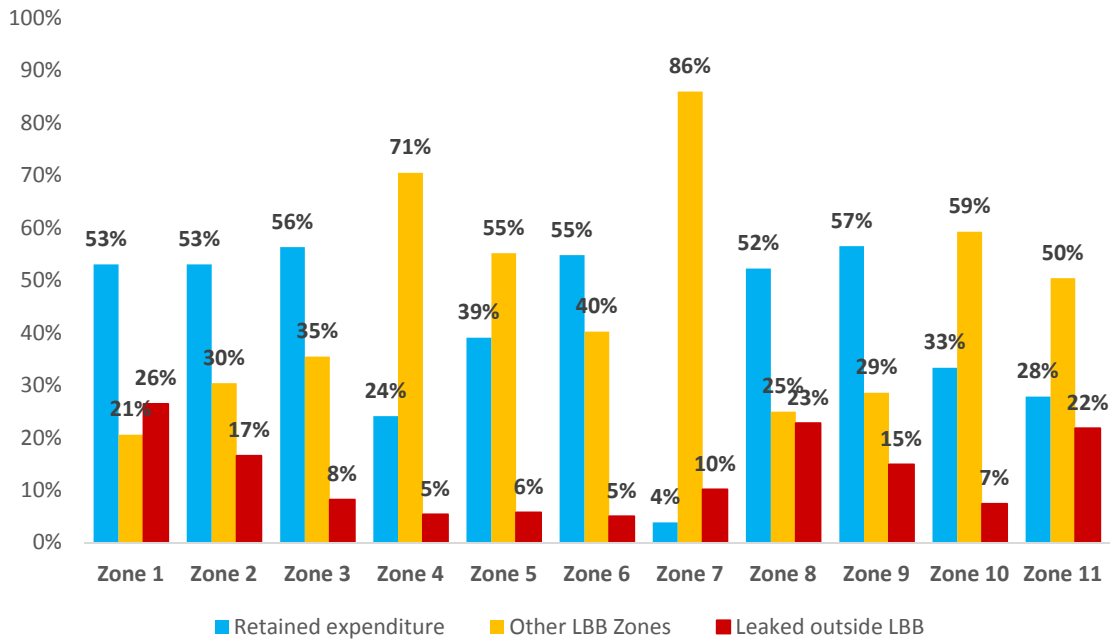
Table 5.3 Convenience spending patterns in 2017

Convenience spending patterns	%	£m
Turnover retained in LBB zones	74%	£748
Turnover derived from elsewhere in study area	13%	£134
Leakage from LBB zones	26%	£267

Source: PBA based on NEMS Household survey (May 2017)

- 5.19 LBB is considered to have a strong convenience retention rate, at 74%, especially given the dense network of centres in adjoining authorities. The convenience retention rate is significantly higher than the comparison retention rate which is expected given the localised nature of convenience shopping.
- 5.20 Figure 5.2 summarises for each zone, the amount of convenience expenditure retained within the zone itself, the amount retained in LBB and the amount leaked to destinations outside LBB.

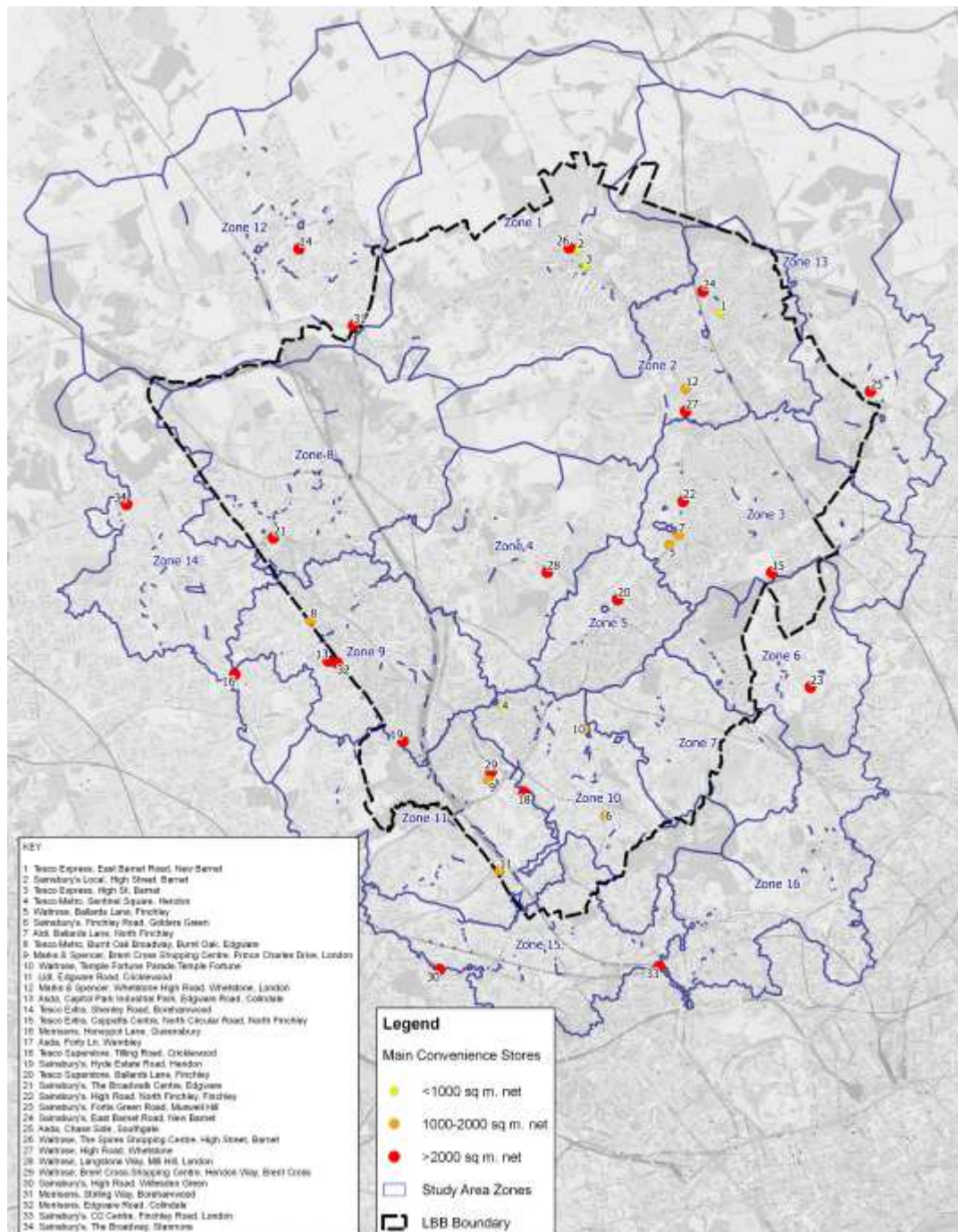
Figure 5.2 Convenience spending patterns by zone



5.21 The graph shows that all 11 LBB zones display strong convenience retention rates. The zones with the highest level of expenditure leakage (zone 1, 8 and 11) are all located on the edge of the LBB authority boundary whereas most zones with very low levels of expenditure leakage (zones 4, 5 and 10) are located centrally within the LBB. This analysis suggests the primary reason for expenditure leakage is the proximity of some local residents to centres located in adjoining authorities. Overall the analysis suggests that most residents living in the LBB zones are well served by local convenience facilities.

5.22 Figure 5.3 below provides a snapshot of all the convenience stores within the study area which register a total market share across all 16 zones.

Figure 5.3 Spread of convenience stores across the study area which attract an overall market share



Source: PBA

5.23 These show that the strongest performing convenience stores are the larger stores situated within Zones 1 and 2 of the study area. However, stores of less than 1000 sq.m have a more dispersed pattern across the various LBB town centres.

Summary

5.24 As part of this study, a new household survey of shopping and leisure patterns has been undertaken across a 16 zone study area. The study zones are similar to those

surveyed in the 2008 household survey which also allows us to assess how the performance of LBB centres has changed over the last nine years. The key findings of the analysis of spending patterns are as follows:

- LBB has a strong comparison retention rate; 69% of comparison expenditure is retained within the borough;
- The main competing comparison destinations across LBB are Watford, Borehamwood and Enfield;
- Brent Cross remains the dominant comparison shopping destination in study area although its performance has stayed relatively stable since 2008;
- The performance of North Finchley as a comparison destination has improved significantly since 2008;
- The performance of Edgware as comparison destination has improved significantly since 2008;
- LBB has a strong convenience retention rate; 74% of convenience expenditure is retained within the borough; and
- LBB residents are well served by the existing network of centres in the borough which largely meet local residents needs for convenience shopping.

Key findings

- LBB has a strong comparison retention rate; 69% of comparison expenditure is retained within the Borough
- The comparison market share achieved by North Finchley and Edgware in their respective core catchment areas increased significantly between 2008 and 2017
- North Finchley and Edgware experienced significant comparison turnover growth between 2008 and 2017
- The comparison market share achieved by Brent Cross in its core catchment areas has stayed relatively stable since 2008 and Brent Cross experienced limited comparison turnover growth
- LBB has a strong convenience retention rate; 74% of convenience expenditure is retained within the borough.

6 QUANTITATIVE RETAIL NEEDS

Introduction

- 6.1 This section should be read in conjunction with the tables contained at Appendix H which sets out all the information referred to below, together with full details of relevant data sources. An overview of the method is set out in Appendix I .
- 6.2 Capacity forecasts should, in line with the PPG, be subject to regular review throughout the plan period in order to ensure an up-to-date evidence base which is based on accurate economic and market trends. PBA also advise that longer-term quantitative forecasts set out in this assessment (post-2021) should be treated as indicative.

Population and expenditure growth

- 6.3 The study adopts Experian's base year population in 2015 across the study area's 16 zones; Experian's data is aligned with the ONS's 2014-based sub-national population projections (SNPP). Thereafter, population growth in the 11 LBB zones is aligned with the GLA's 2016-based projections¹⁰; population growth in the zones which lie primarily outside LBB is derived from Experian and therefore aligned with the SNPP.
- 6.4 The table below shows that over the period, there is forecast to be an additional 148,000 residents in the study area; with approximately two thirds of this growth in LBB.

Table 6.1 Population growth across the study area

	LBB zones (1-11)	Zones outside LBB (12-16)	Study area total
2017	486,921	285,278	772,199
2021	511,851	297,412	809,263
2026	539,214	310,468	849,682
2031	563,007	321,997	885,004
2036	584,871	334,833	919,704
Growth 2017-36	97,950	49,555	147,505

Source: Table 1 Appendix H

- 6.5 The total expenditure growth in the comparison sector expected over the study period between 2017 and 2036 is summarised in the table below. This includes a deduction (adjusted for sales in stores) made for special forms of trading (SFT) which is derived from ERPBN and held constant after 2035. Over the period, in line with the trends identified in Section 4, the proportion of SFT is forecast to continue steadily increase from 13.2% in 2016 to 16.5% in 2035.

¹⁰ Demographic Projections (local authority population projections - Trend projections, Central migration scenario)

Table 6.2 Comparison expenditure growth 2017-36 (exc. SFT) (£M)

	LBB zones (1-11)	Zones outside LBB (12-16)	Study area total
2017	£1,541	£917	£2,458
2021	£1,738	£1,026	£2,763
2026	£2,137	£1,250	£3,386
2031	£2,601	£1,511	£4,113
2036	£3,176	£1,847	£5,023
Growth 2017-36	£1,635	£930	£2,564

Source: Table 3a Appendix H

- 6.6 This shows that over the study period, comparison expenditure in the area is expected to more than double – both in the borough and the wider study area.
- 6.7 Similarly, for the convenience sector, the table below summarises the expenditure growth expected between 2017 and 2036 which again, includes a deduction for SFT. In the convenience sector, the proportion of SFT is forecast to continue to steadily increase in the long term from 3.0% in 2016 up to 5.3% in 2035 according to Experian. This growth in SFT means that per capita convenience expenditure will actually modestly decline over the study period.

Table 6.3 Convenience expenditure growth 2017-36 (exc. SFT) (£M)

	LBB zones (1-11)	Zones outside LBB (12-16)	Study area total
2017	£1,015	£622	£1,637
2021	£1,051	£639	£1,690
2026	£1,097	£661	£1,758
2031	£1,146	£686	£1,832
2036	£1,196	£716	£1,912
Growth 2017-36	£181	£94	£275

Source: Table 3b Appendix H

- 6.8 In total terms though, as show in Table 6.3, there is forecast to be an 18% increase in convenience expenditure generated by borough residents and a 15% increase in those study zones outside the borough. The overall increase is some £275 i.e. 17% increase over the whole study area.
- 6.9 There will be far greater growth in comparison spending due to the fact that no convenience expenditure growth is forecast by Experian in the medium term (2019-2023) and very low annual average growth is forecast for the long term (0.1% from 2024-2035). Whereas in the comparison sector, Experian forecast a medium term annual average growth rate of 3.0% and a long-term growth rate of 3.2%.

Claims on expenditure growth

- 6.10 As set out in the previous section, SFT such as online shopping has been removed from the baseline expenditure forecasts, in line with current forecasts of growth in this sector set out in ERPBN. The total expenditure figures summarised in

- 6.11 Table 6.2 and Table 6.3 make allowance for this.
- 6.12 In addition to SFT, account needs to be taken of commitments for new retail floorspace (schemes implemented but not yet trading at the time of the household survey, or extant planning permissions which would result in additional retail floorspace) and sales density growth (which is the growth in turnover for existing retailers within the study area).

Commitments

- 6.13 A schedule of commitments is provided at **Table 2** (Appendix H). Based on supporting evidence provided with those commitments, the table below converts these into draws on expenditure. It is assumed that all the commitments will be trading by 2021 and the assumptions outlined below in relation to sales efficiency growth have been applied.

Table 6.4 Cumulative turnover of commitments by zone (£M)

Zone	Comparison goods				Convenience goods			
	2021	2026	2031	2036	2021	2026	2031	2036
3	£2.12	£2.33	£2.56	£2.81	£1.21	£1.21	£1.21	£1.21
4	£2.49	£2.74	£3.01	£3.30	£4.62	£4.62	£4.62	£4.62
9	£25.55	£28.07	£30.85	£33.89	£47.40	£47.40	£47.40	£47.40
11	£219.69	£241.37	£265.18	£291.35	£107.79	£107.79	£107.79	£107.79
15	£5.42	£5.96	£6.54	£7.19	£14.36	£14.36	£14.36	£14.36
Total	£255.27	£280.46	£308.13	£338.54	£175.39	£175.39	£175.39	£175.39

Source: Table 2 Appendix H

- 6.14 The main commitment is the Brent Cross Cricklewood regeneration scheme which accounts for nearly 80% of committed comparison space and over 60% of committed convenience space.

Floorspace efficiency growth

- 6.15 Sales density growth (floorspace productivity or efficiency growth) is the amount of expenditure which is 'ring fenced' for existing floorspace to improve its turnover each year. Allowances for sales density growth are linked to expenditure growth; expenditure growth rates of 1.9% per annum has been used for the period from 2016 onwards. Because of the low level of expenditure growth forecast up to 2016, no allowance for improvement in densities is made in the first year of the study.
- 6.16 Although different types of floorspace will have different abilities to absorb expenditure growth, with more modern floorspace being able to accommodate growth than more historic floorspace. However, given there is a mix of floorspace types within the study area, this average approach is considered to be robust.

Under/overtrading floorspace

- 6.17 The benchmark turnover is the turnover the store would be expected to achieve if trading at company average turnover per sqm rates. Overtrading refers to the performance of centres and stores within a catchment in relation to the expected benchmark turnovers. Overtrading can also be assessed through qualitative indicators such as overcrowding and congestion in stores. As such, overtrading is both a quantitative and qualitative indicator of need. Although benchmarking is reliant on the use of operator average data in terms of the split between convenience and comparison goods floorspace within the stores (except in some stores where we have adjusted this based on our site visits to stores), and is based on national average sales densities, it nevertheless provides a robust, and industry-accepted, method of assessing current trading performance.
- 6.18 Quantitatively, for comparison goods floorspace, it is not considered appropriate to make any allowance for any over or under-trading. This is primarily because comparison floorspace is generally less susceptible to the physical manifestations of overtrading such as congestion on the shop floor, out-of-stock items and queuing and is able to absorb growth. This is also evident in the higher level of sales efficiency growth set out earlier in this section.

Quantitative need

- 6.19 Tables 5a and 5b (Appendix H) draws together the needs identified across the study period, expressed with reference to the adopted interval years of 2017, 2021, 2026, 2031 and 2036, for comparison and convenience goods. They are structured as follows:

Table 6.5 Step-by-step need

Row	Explanation/description
A	Total comparison goods expenditure available in the study area (£M)
B&C	Proportion of comparison goods expenditure which is retained (£M & %). Market shares are held constant across the study period.
D&E	Inflow expenditure derived from the study area zones outside LBB (£M & %).
F	Total available comparison expenditure i.e. retained + inflow (C+E)
G	Baseline comparison turnover of existing stores in LBB (retained expenditure + inflow), making allowance for sales efficiencies over the study period.
H	Claims on comparison goods expenditure as explained above.
I	Total claims on expenditure i.e. G+H
J	Residual comparison goods expenditure when deductions are made for claims (F-I).
K-M	Residual expenditure converted into floorspace need by applying a generic comparison sales density of £6,000 (grown across the study period to allow for sales efficiencies) and expressed in terms of net and gross floor areas

Source: Appendix H

Comparison goods

- 6.20 The table below summarises the identified quantitative needs across the study period. This shows that it is only after 2026 that comparison capacity starts to emerge, and as noted above, we recommend caution is exercised when considering the needs identified over the longer term.

Table 6.6 Quantitative comparison capacity (£M) – constant market share

	2017	2021	2026	2031	2036
Expenditure capacity (£M)	£0	-£189	-£10	£209	£506
Net floorspace capacity (sqm)	-	- 29,227	- 1,430	26,809	58,960

Source: Table 5a Appendix H

- 6.21 This is based on a constant market share approach. Given the scale of growth planned at Brent Cross, and the fact that inflow expenditure accounts for approximately 25% of the existing turnover, it is reasonable to expect that, once completed, a similar proportion of the proposed floorspace will be supported by inflow expenditure. Similarly, it is reasonable to expect that while there will be some diversion within the study area, there will be an increased degree of retention of comparison expenditure within LBB.
- 6.22 Table 6a therefore sets out capacity based on a 2% increase in market share and 3% increase in inflow from 2021 onwards. This results in the following quantitative needs:

Table 6.7 Quantitative comparison capacity (£M) – increased market share

	2017	2021	2026	2031	2036
Expenditure capacity (£M)	£0	-£106	£92	£334	£658
Net floorspace capacity (sqm)	-	-16,335	12,998	42,797	76,725

Source: Table 6a Appendix H

- 6.23 This continues to show negative capacity to 2021. After 2021, capacity starts to emerge, such that by 2026 there is substantial capacity identified. Again though, caution should be exercised when considering these numbers.
- 6.24 Additional retail development or refurbishments in the borough's other locations may be comparable to development and investments happening across London, so are unlikely to make anything more than very modest improvements to expenditure retention. Conversely the scale of investment at Brent Cross, including major improvements to public transport access, would represent a step change in comparison provision within the borough.
- 6.25 If the development at Brent Cross does not come forward, these increased market share capacity figures are not relevant. They are premised on a significant expansion to Brent Cross's existing function and attraction; it is the critical mass of this additional floorspace which is likely to enable it to clawback trade which is currently going to

Westfield London or Central London as regional shopping destination, as well as attracting increased inflow expenditure from people outside LBB who currently shop at those destinations in favour of Brent Cross.

Convenience goods

- 6.26 The table below shows that across the study period, there is no capacity for additional convenience floorspace in the borough. This is because any additional expenditure growth is as a result of population growth and, while this does generate an increase in convenience expenditure across the study period, this is more than absorbed by the convenience commitments.

Table 6.8 Quantitative convenience capacity (£M) – constant market share

	2017	2021	2026	2031	2036
Expenditure capacity (£M)	£0	-£144	-£104	-£61	-£18
Net floorspace capacity (sqm)	-	-12,010	-8,663	-5,076	-1,508

Source: Table 5b Appendix H

- 6.27 While we have modelled an increased market share scenario for comparison goods, because of the inherently more localised nature of convenience shopping patterns, we do not envisage substantial change as a consequence of the regeneration, and the committed additional convenience floorspace, at Brent Cross or Colindale. Both locations already have strong foodstore provision and while the commitments envisage some reconfiguration in the case of Brent Cross, it is likely to result in increased competition rather than substantial changes in market share.

Summary

- 6.28 The planned regeneration at Brent Cross has huge implications for both convenience and comparison capacity over the study period.
- 6.29 While there is, in comparison terms, substantial expenditure growth in the short term, this is more than absorbed by Brent Cross and other commitments in the borough. Once completed, it is expected that the regeneration at Brent Cross will result in greater retention within and inflow to the borough. However, even taking this into account, we do not expect any capacity to emerge until the end of the study period (2036), and we recommend that these figures are treated as indicative.
- 6.30 In convenience terms, expenditure growth is more limited, particularly in the short term and it is really only generated by population growth. Existing commitments at Brent Cross and Colindale mean that over the study period, there is no additional quantitative need identified.

7 COMMERCIAL LEISURE NEEDS

Introduction

- 7.1 This section reviews leisure spending patterns, expenditure growth and quantitative need for commercial leisure uses.
- First the household telephone survey results are used to identify patterns of leisure spending.
 - An overview of the study area and study zones adopted is provided in Section 5.
 - Then the level of spending growth expected to come forward over the study period is summarised.
- 7.2 The range of commercial leisure uses assessed are defined in Annex 2 of the NPPF as follows: ‘cinemas, restaurants, drive-through restaurants, bars and pubs, night-clubs, casinos, health and fitness centres, indoor bowling centres, and bingo halls’. The third part of this section presents the quantitative need assessment for food and drink uses (Class A3-A5) and cinemas.

Spending patterns

- 7.3 This section should be read alongside tables L1 – L10 enclosed at Appendix J Table L5 shows the total food & drink turnover (Class A3-A5) in 2017 for the study area which is a product of adding table L3b (restaurants & cafes) and table L4b (pubs etc.).
- 7.4 Table 7.1 summarises for LBB the proportion of leisure spending for the main leisure categories which is retained within LBB (retained expenditure) and leaked to other destinations outside of LBB (expenditure leakage). The table also shows the proportion of leisure spending which is drawn from zones within the study area but outside of LBB (inflow).

Table 7.1 LBB leisure spending summary

Sector	Expenditure retained		Expenditure inflow		Expenditure leaked	
	%	£m	%	£m	%	£m
Food & drink (A3-5)	56%	421.115	8%	59	44%	334
Cinema	43%	24	6%	4	57%	33
Health & fitness	70%	80	23%	26	30%	34
Family entertainment ¹¹	71%	42	16%	10	29%	17
Games of chance ¹²	0%	0	0%	0	100%	62

¹¹ Family entertainment includes bowling, ice skating, children’s play centres, museums and visitor attractions.

¹² Games of chance covers a wide range of games that involves anything of monetary value, or on which contestants may wager money is considered to be gambling.

Source: PBA based on NEMS household survey (May 2017)

- 7.5 LBB is considered to have a strong retention rate in both the health and fitness (70%) and family entertainment sectors (71%). A significant amount of food & drink and cinema expenditure is leaked to destinations outside the borough.
- 7.6 Central London is a main competing destination for food & drink, family entertainment and cinema expenditure. This is not surprising considering the accessibility of central London from LBB and the fact that consumers are generally willing to travel further afield for leisure facilities. A significant amount of cinema expenditure is also leaked from LBB to Everyman Muswell Hill (LB Haringey) which is a niche cinema provider and attracts a 30% market share arising from LBB.
- 7.7 The spending patterns derived from the household survey reflect the patterns of leisure provision in the study area. LBB is well served by gyms, health clubs and family entertainment venues but there are relatively few cinemas. In total there are just three cinemas providing 14 screens, including Everyman at Great North Road (five screens) local centre, Vue North Finchley at Great North Leisure Park (eight screens) and the independent Phoenix Cinema in East Finchley district centre (single screen).
- 7.8 The survey results indicate there is scope to increase the amount of expenditure retained within LBB through the provision of improved leisure facilities, particularly food & drink and cinema facilities.
- 7.9 Across LBB spending on food & drink (Class A3-A5) accounts for 77% of total leisure expenditure in 2017. Table 7.2 summarises the food and drink turnover and market share in 2017 for each Edgware major centre and each LBB district centre. It is notable that existing provision at Brent Cross does not have a significant food & drink turnover.

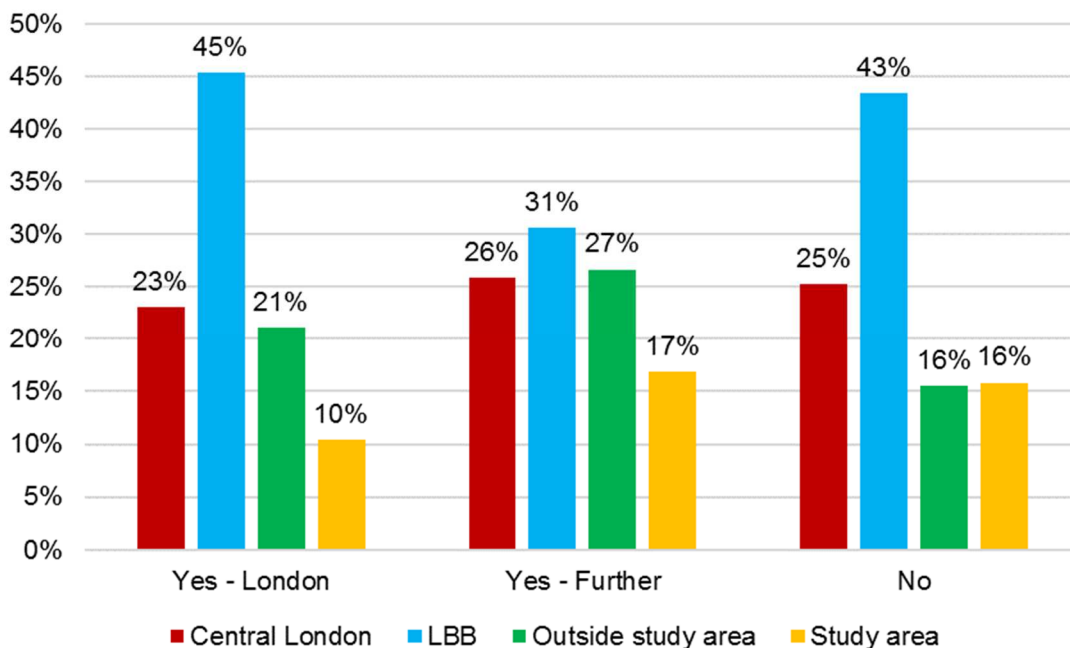
Table 7.2 Food & drink market shares and turnover (2017)

Centre	Turnover (£m)	Market share of study area (%)
North Finchley district centre	58	8%
Whetstone district centre	53	7%
Edgware major centre	47	6%
Finchley Church End district centre	42	6%
Mill Hill district centre	39	5%
Chipping Barnet district centre	38	5%
Golders Green district centre	29	4%
East Finchley district centre	26	3%
Hendon Central district centre	19	2%
Cricklewood district centre	14	2%
New Barnet district centre	12	2%
Colindale district centre	12	2%
Temple Fortune district centre	10	1%
Burnt Oak district centre	0	0%

Source: PBA based on NEMS Household survey (May 2017)

- 7.10 According to the household survey results North Finchley, Whetstone and Edgware are the most popular destinations in LBB for eating and drinking out while Colindale, Temple Fortune and Burnt Oak are the three least popular food and drink destinations in LBB. As we note in our health check assessments, Edgware, North Finchley have a varied range of predominantly independent restaurants covering a multitude of nationalities such as Italian, Asian (Indian, Bangladeshi, Japanese), American, French and traditional British. However, a small number of chain restaurants are present such as Nandos in Edgware and Pizza Express in Whetstone.
- 7.11 The survey also included questions in order to ascertain if the introduction of night tube services and ride sharing services (such as Uber) have had an impact on spending patterns for evening leisure uses (restaurants & cafes and pubs). Night tube services were introduced on the Northern line in November 2016 and on the Piccadilly line in December 2016.
- 7.12 Respondents were asked if the use of the night tube or ride sharing companies changed where they travelled to for a night out. The answers to this question included: ‘yes- more likely to travel into London’, ‘yes- more likely to travel further afield’ or ‘no- travel to the same locations as previously’. We looked at these results in the context of where respondents were spending most money on typical night time economy uses: restaurants and cafes; and pubs, bar and music venues etc.
- 7.13 Figure 7.1 summarises the survey response to question 33 (In which city, town or out-of-town location does your household spend most money on restaurants & cafes?) grouped by the respondents’ answers to question 40.

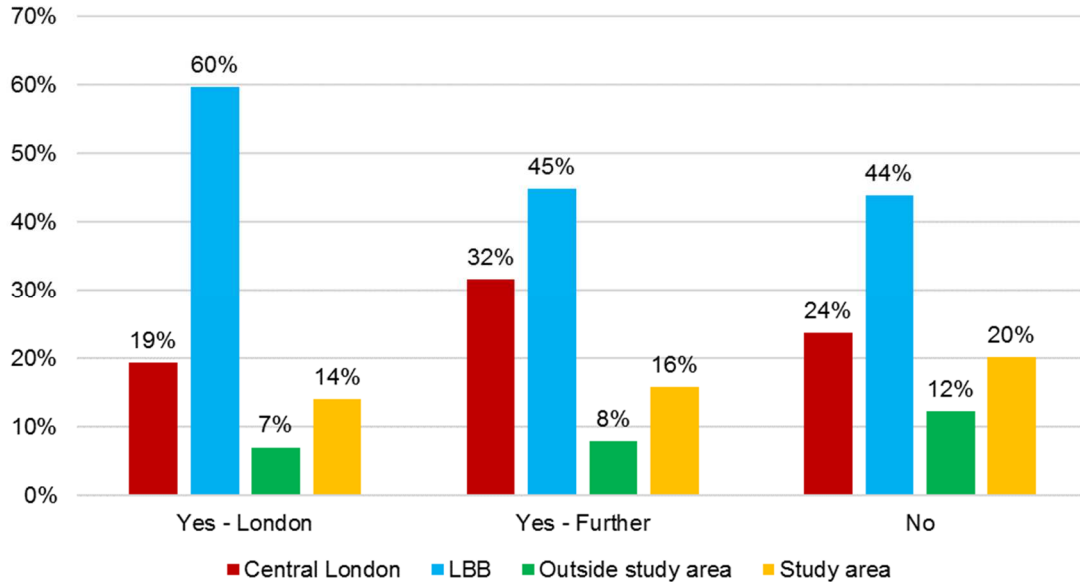
Figure 7.1 Impact on night tube on restaurants and cafes



Source: PBA based on NEMS Household survey (May 2017)

- 7.14 The survey results suggest that the introduction of night tube and ride sharing services has not had a significant impact on spending patterns for restaurants & cafes in LBB. The results are somewhat mixed but it may be too early to tell what the impact on spending given the relatively short operation of the night tube service prior to the survey being undertaken. For example, respondents who stated that they are more likely to travel into London were more likely to spend most money on restaurants & cafes in LBB (45%) than those respondents who stated they have not changed where they travel for a night out (43%).
- 7.15 However, respondents who stated that they are more likely to travel further afield were less likely to spend most money on restaurants & cafes in LBB (31%) than those respondents who stated they have not changed where they travel for a night out (43%).
- 7.16 As expected, respondents who stated that they are more likely to travel further afield were more likely to spend most money on restaurants and cafes outside the study area (27%) than those respondents who stated they have not changed where they travel for a night out (16%).
- 7.17 Figure 7.2 summarises the survey response to question 34 (In which city, town or out-of-town location does your household spend most money on pubs etc.?) grouped by the respondents' answers to question 40.

Figure 7.2 Impact on night tube on pubs, bars and night-time economy



Source: PBA based on NEMS Household survey (May 2017)

- 7.18 The survey results suggest that the introduction of night tube and ride sharing services has not had a significant impact on the spending patterns for pubs and other night-time leisure venues in LBB.
- 7.19 For example, respondents who stated that they are more likely to travel into London (60%) or further afield (45%) were more likely to spend most money on pubs etc. in

LBB than those respondents who stated they have not changed where they travel for a night out (44%).

- 7.20 However, respondents who stated that they are more likely to travel further afield (32%) were more likely to spend most money on pubs etc. in Central London than those who stated they have not changed where they travel for a night out (24%).
- 7.21 Unexpectedly, respondents who stated that they are more likely to travel further afield (8%) were less likely to spend most money on pubs etc. outside the study area than respondents who stated they have not changed where they travel for a night out (12%).
- 7.22 The survey results shown in figure 7.1 and figure 7.2 suggest that the introduction of night tube and ride sharing services has not had a significant impact on evening leisure spending patterns in LBB overall although there is some variation within the results as explained above.

Leisure spending growth

- 7.23 Table L1 and Table L2 at Appendix J shows the per capita and total leisure spending growth expected to come forward for each leisure sector. Table 7.3 provides a summary of leisure spending growth in LBB as a whole for each sector.

Table 7.3 LBB leisure sector expenditure growth 2017-2036 (£m)

	Food & drink (A3-A5)	Cinema & theatre	Recreation	Games of chance
LBB	£632	£38	£99	£47

Source: PBA based on Experian 2016

- 7.24 Leisure spending patterns derived from the household survey have been applied to the total sectoral leisure expenditure to show the level of expenditure growth forecast in Edgware major centre and each district centre in LBB. This is summarised in Table 7.4.

Table 7.4 LBB centres leisure sector expenditure growth 2017-2036 (£m)

Centre	Food & drink (A3-A5)	Cinema & theatre	Health & fitness	Family entertainment
North Finchley district centre	29	0	8	3
Whetstone district centre	28	0	0	0
Edgware major centre	25	0	0	0
Finchley Church End district centre	22	0	3	0
Mill Hill district centre	20	0	0	0
Chipping Barnet district centre	19	0	0	0
Golders Green district centre	15	0	10	0

Centre	Food & drink (A3-A5)	Cinema & theatre	Health & fitness	Family entertainment
East Finchley district centre	14	5	0	0
Hendon Central district centre	10	0	0	0
Cricklewood district centre	7	0	25	0
Colindale district centre	6	0	0	0
New Barnet district centre	6	0	0	0
Temple Fortune district centre	5	0	0	0
Burnt Oak district centre	0	0	4	0

Source: PBA based on NEMS Household survey (May 2017)

- 7.25 According to the household survey results North Finchley, Whetstone and Edgware are expected to experience the greatest growth in food and drink expenditure whereas Colindale and Temple Fortune are expected to experience the least amount of growth. Since East Finchley is the only centre with a cinema it is the only centre expected to experience a growth in cinema expenditure. Five centres are forecast to experience growth in health & fitness expenditure with Cricklewood district centre forecast to experience the greatest amount of the expenditure growth. North Finchley is the only centre expected to experience growth in spending on family entertainment.
- 7.26 This assessment suggests that there is significant scope for many LBB centres to increase their leisure turnover through the provision of additional and/or better quality leisure facilities.

Quantitative leisure needs

- 7.27 Quantifying the scale of need for commercial food & drink uses is only indicative since food and beverage businesses differ greatly. For example, national chains are expected to achieve a much greater turnover than small independent outlets. Nevertheless, a high-level quantitative assessment of food and drink need has been undertaken, this is presented in Table L10 in Appendix J and summarised in Table 7.5. The figures presented are cumulative.

Table 7.5 LBB food & drink capacity by 2017-2036

	2017	2021	2026	2031	2036
Expenditure £m	0	27	89	156	234
Floorspace sqm gross	0	4,120	13,120	22,630	33,330

Source: PBA based on Experian MMG3 2015

- 7.28 The assessment assumes that trading is in equilibrium in the bases year – i.e. there is no under or over trading in LBB in 2017. Table L10 shows in the medium there is significant capacity for additional food & drink floorspace up to 2021. The long-term

quantitative figures (beyond 2021) should be treated as indicative only and reviewed regularly.

- 7.29 A high-level assessment of cinema screen capacity in LBB has also been undertaken and the cumulative results are summarised in Table 7.6.

Table 7.6 Cinema screen capacity 2017-2036

	2017	2021	2026	2031	2036
Total population	486,921	511,851	539,214	563,007	584,871
Retention rate	75%	75%	75%	75%	75%
Potential catchment (population)	365,190	383,888	404,410	422,255	438,653
Cinema screen potential	23	24	25	27	28
Existing cinema screens	14	14	14	14	14
Cinema screen capacity*	9	10	11	13	14

* Not including cinema provision as part of the Brent Cross development

Source: PBA based on Experian MMG3 2015

- 7.30 Based on an assumed retention rate of 75% it is estimated that LBB could support ten additional cinema screens by 2021 and 14 screens by 2036. The medium-term capacity is equivalent to a large multiplex cinema or up to five small boutique cinemas (assuming no more than two screens each). Whilst the Brent Cross development includes the provision of a multiplex cinema which will account for a significant element of the indicated capacity, we consider there may be potential for localised boutique style cinemas at the major and larger district centres dependent on occupier interest.
- 7.31 The 75% retention rate is a significant increase considering that currently only 43% of expenditure is retained in LBB. Current spending patterns reflect the limited provision of cinemas in LBB and this assessment suggests that there is an opportunity to reduce cinema expenditure leakage through the provision of additional cinema screens in LBB. Because existing cinema provision is concentrated in the east of the borough, additional provision should be encouraged in the west of the borough to improve current retention rates.

Key findings

- Food & drink uses (A3-A5) uses account for approximately 77% of total leisure spending growth in LBB.
- North Finchley, Whetstone and Edgware are forecast to experience the most significant levels of food & drink expenditure growth based on current spending patterns.
- The quantitative food & drink assessment indicates that there is sufficient expenditure capacity in LBB to support an additional 4,120 sq.m Class A3-A5 floorspace up to 2021.
- The survey results suggest that the introduction of night tube and ride sharing services has not had a significant impact on evening leisure spending patterns in LBB.
- Spending on recreational and sporting services accounts for 12% of total leisure spending growth in LBB.
- Cricklewood, North Finchley and Golders Green are forecast to experience the most significant levels of recreational and health and fitness expenditure growth based on current spending patterns.
- Spending on cinemas and theatres accounts for 5% of total leisure spending growth in LBB. LBB is currently served by three cinemas and the experiences a high level of expenditure leakage (57%).
- The cinema screen capacity assessment suggests there is capacity to support an additional 10 screens up to 2021 in LBB, equivalent to a large multiplex cinema or up to five boutique cinemas.

8 QUALITATIVE NEEDS

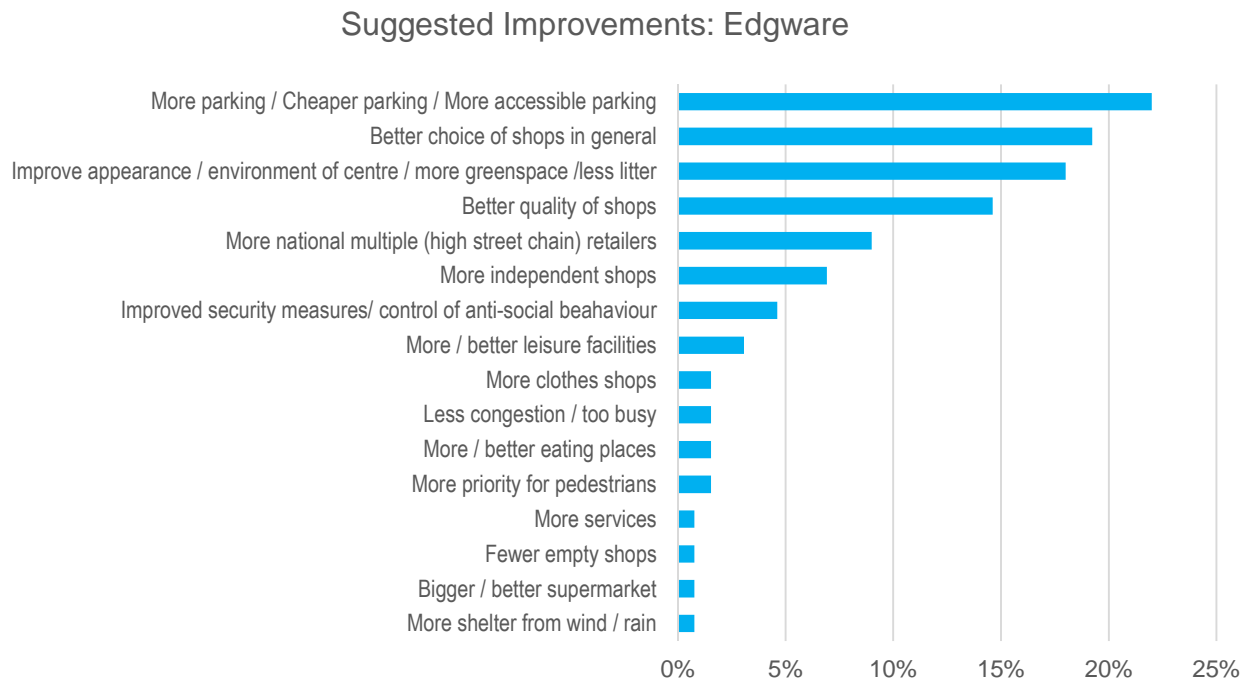
Introduction

- 8.1 Both the NPPF and the PPG are silent on the weight to be attached to qualitative retail floorspace needs, and how such needs should be assessed. Whilst recognising that it has been formally revoked, PBA make reference to the guidance in the preceding CLG Practice Guidance, which advises that qualitative factors to take into account include:
- identifying gaps in local provision;
 - consumer choice and competition;
 - overtrading;
 - location-specific issues; and,
 - quality of existing provision.
- 8.2 These overlapping criteria are reviewed below with reference to qualitative comparison and convenience goods needs. The assessment is informed by the health check assessments of the town centres at Appendix B
- 8.3 The household survey undertaken in support of this study included a number of questions to understand local residents' opinions of centres within LBB. Specifically, this included suggested improvements to the centres and provides a helpful indicator of qualitative need. In addition, respondents were asked how they travel to their centre.
- 8.4 Gaps in provision are ultimately subjective; what one particular shopper may consider a gap in provision may not be of particular concern to another. Ultimately, a judgement has to be exercised in reflecting what additional retail provision is taking into account a range of factors including:
- The position of the centre within LBB's retail hierarchy;
 - The specific role and function of the centre within that hierarchy;
 - The need to meet a range of identified shopping requirements; and
 - The need to minimise expenditure leakage and promote sustainable patterns of shopping.
- 8.5 However, these factors need to be balanced against the likely achievability of these ambitions, including:
- The projected available comparison and convenience capacity over the plan period as identified in Section 6;
 - How this fits with current and emerging retail trends as outlined in Section 4; and
 - Having regard to identified and likely retailer requirements for the various centres.
- 8.6 Our assessment of qualitative retail needs takes these factors into account.

Edgware major centre

- 8.7 Our health check in Appendix B has found that Edgware is currently performing with a diverse retail offer with a mix of national multiples and independent operators present in both the convenience and comparison categories. This is reflected in the relatively low level of responses from the household survey (see Figure 8.1 below) suggesting that more multiple (9%) and independent (7%) retailers are needed in the centre. Therefore, we consider there are no significant gaps in retail and service provision in Edgware. The health check also identifies that the centre has a good food and drink offer and also a range of complementary D2 leisure uses including a 24-hour gym in terms of consumer choice and quality, though the centre lacks a cinema or a bowling alley and could be enhanced commensurate with the scale of the centre.
- 8.8 As Figure 8.1 also shows two of the highest factors that respondents consider need to be improved in Edgware is its environmental quality (22%) and the need for more and better car parking (18%).
- 8.9 In light of the limited available quantitative comparison and convenience retail floorspace available over the study period (see appendix H), may be appropriate to target potential gaps in leisure provision. The quantitative leisure assessment (section 7) and Table L11 (Appendix J) shows there is capacity for additional food and drink (A3-A5) floorspace in Edgware across the study period. The cinema capacity assessment (Table L12, Appendix J) shows there is capacity for 14 additional cinema screens across the entire study period.
- 8.10 Subject to the identification of suitable sites across the Borough, Edgware may be a suitable location for additional cinema screens due to its higher order role. An extension to the Boardwalk Shopping Centre could assist in providing environmental enhancements and additional car parking. More widely the centre could benefit from improving the quality of existing provision through talking forward targeted redevelopment opportunities, perhaps introducing a greater range of leisure and night-time economy uses which are currently limited for a major centre.
- 8.11 We understand that a town team was established in Edgware but has been inactive since 2014 and which, if active, could champion environmental improvements. This would support the conclusions of the TCF which seeks to provide a spatial strategy to encourage and support investment in Edgware town centre and enhance its distinctive character. Overall, the centre is considered to function in line with its position in the hierarchy.

Figure 8.1 Suggested improvements to Edgware town centre



Source: PBA based on NEMS Household survey (May 2017)

District centres

- 8.12 This section focuses on the district centres, first in terms of the overall issues identified in the household survey and the relative levels of satisfaction. It then provides an assessment on a centre-by-centre basis with reference to qualitative convenience, comparison and leisure needs, as well as needs for qualitative improvements to the town centre environment.
- 8.13 Based on the results of the household survey, Table 8.7 identifies the 10 key improvements to the borough’s district centres identified by respondents.

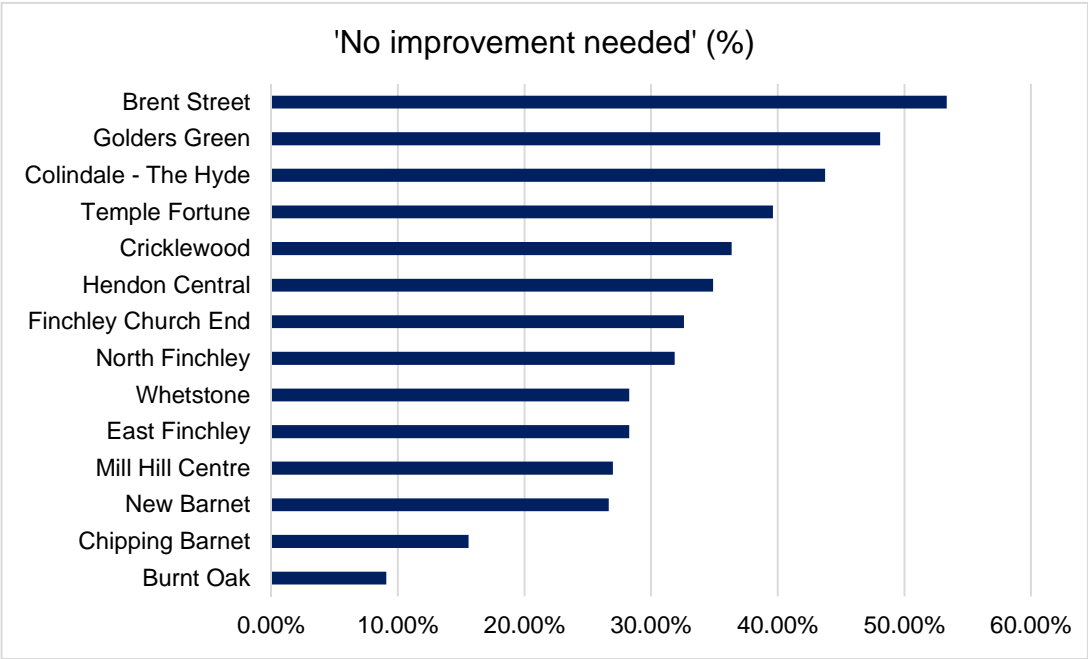
Table 8.1 Top 10 suggestions of improvements across Barnet’s district centres

Number	Issue
1	More parking
2	Cheaper parking
3	More accessible car parking
4	More priority for pedestrians
5	Cleaner streets / removal of litter
6	Improve appearance / environment of centre
7	Better street furniture / floral displays
8	More green spaces / areas
9	More national multiple (high street chain) retailers
10	Bigger / better supermarket

8.14 These figures represent an average figure across all district centres, the top three suggestions revolve around improvements to car parking reinforcing this qualitative factor has a key influence in people’s decisions about whether they use town centres. This contrasts with issue 4 which is giving priority to pedestrians. This highlights the tension between not unduly restricting traffic through the centres while improving the environmental quality navigation of the centres by foot. Indeed, environmental factors dominate numbers 5-8, suggesting that the environmental quality of a centre is an important feature of its attractiveness. Numbers 9 and 10 focus on improved retail provision including national retailers and grocers, which appears to indicate an improved retail offer remains important but is not the highest priority of respondents.

8.15 Figure 8.2 below sets out the proportion of those respondents who stated ‘no improvement needed’ when asked what they think should be done to improve their nearest town centre. The higher the level of this type of response suggests general satisfaction with the qualitative comparison, convenience and services provision within the centre. However, care needs to be exercised with interpreting the data as some centres record a lower level of response.

Figure 8.2 Proportion of respondents stating ‘no improvement needed’



Source: PBA based on NEMS Household survey (May 2017)

8.16 The range of satisfaction is broadly falls between 25% and 55% with the highest satisfaction level of 53% being recorded for Brent Street, followed by Golders Green at 48% and Colindale – the Hyde at 44%. Only two centres – Chipping Barnet (16%) and Burnt Oak (9%) fall below this. Care has to be exercised with Burnt Oak due to the low sample received relative to other centres. However, for Chipping Barnet this low response is reflective of wider concerns regarding the quality of the centre and its retail offer which we discuss further below.

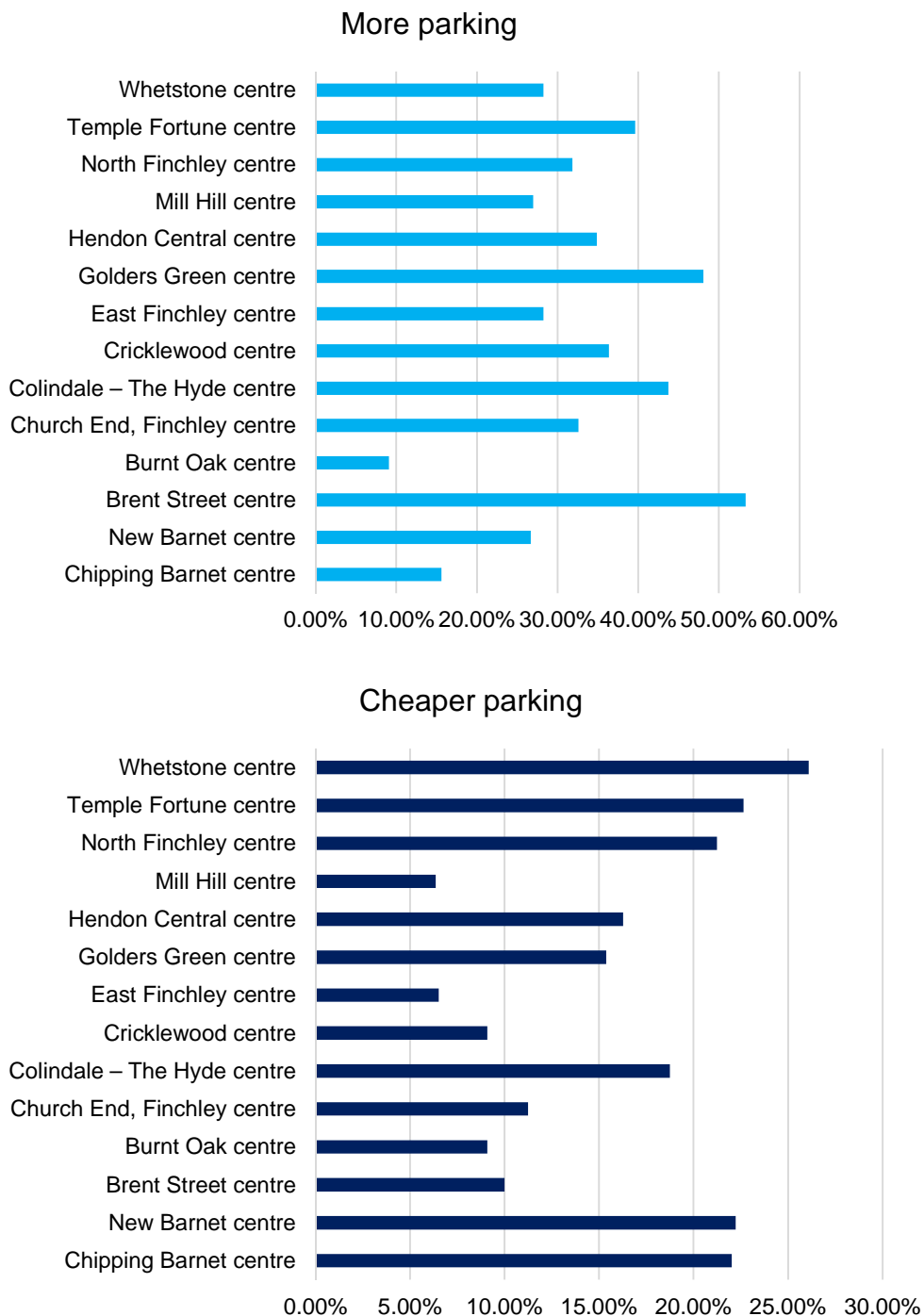
8.17 In comparison with the district centres, Edgware recorded a 38% ‘no improvement needed’ for Brent Cross shopping centre and even larger relative satisfaction of 50%,

just below Brent Street. This reflects the more substantial offer provided at Edgware and to a greater extent Brent Cross.

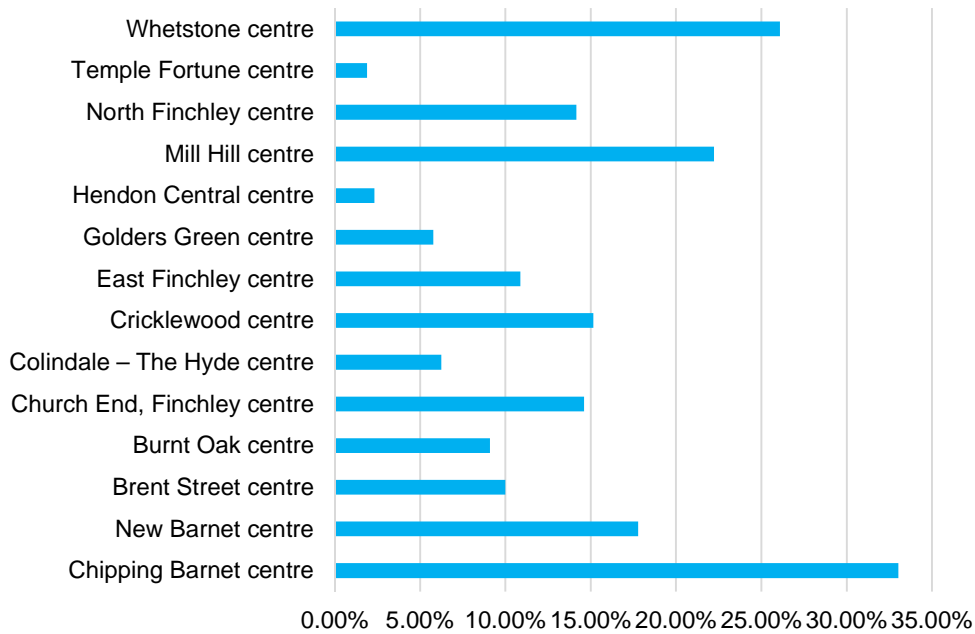
Qualitative findings from the household survey

8.18 Figures 8.3 to 8.5 below illustrate the responses by district centre, which we discuss by each district centre in turn. Where the percentage is shown as zero, this is because no respondents mentioned the issue.

Figure 8.3 Analysis of responses relating to parking

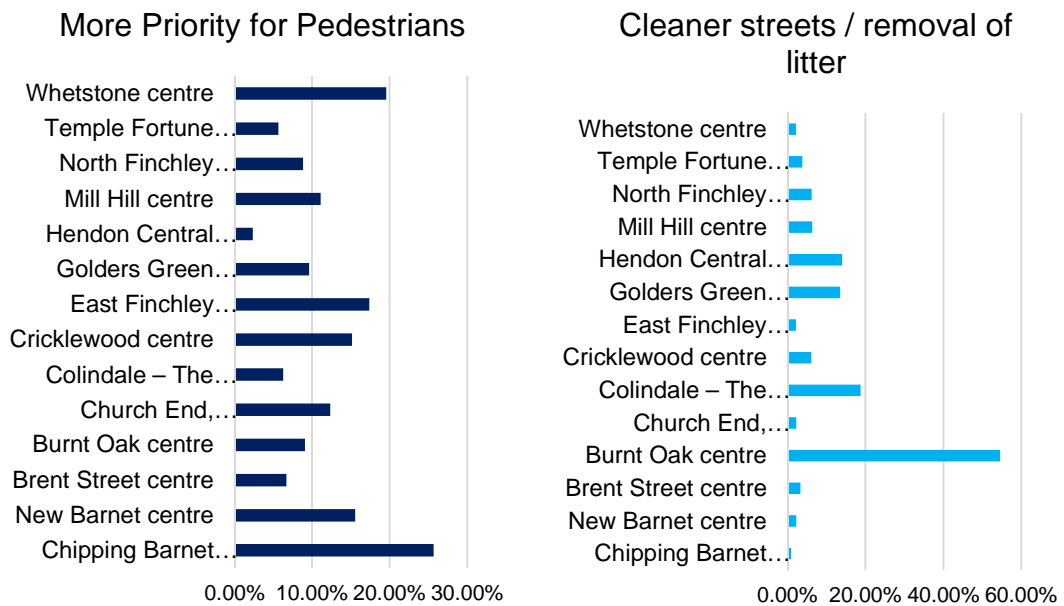


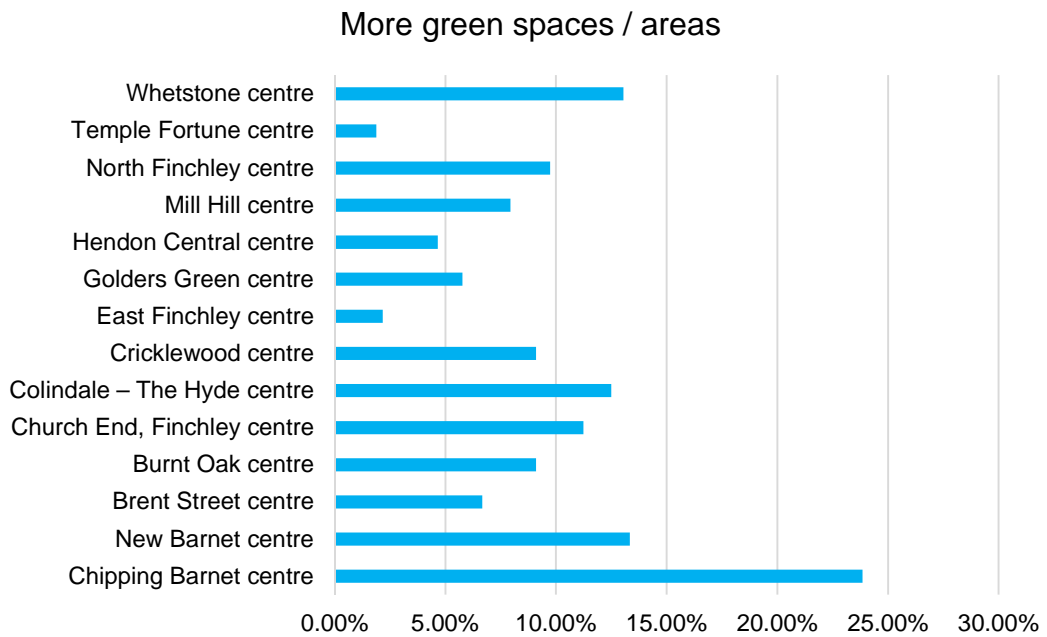
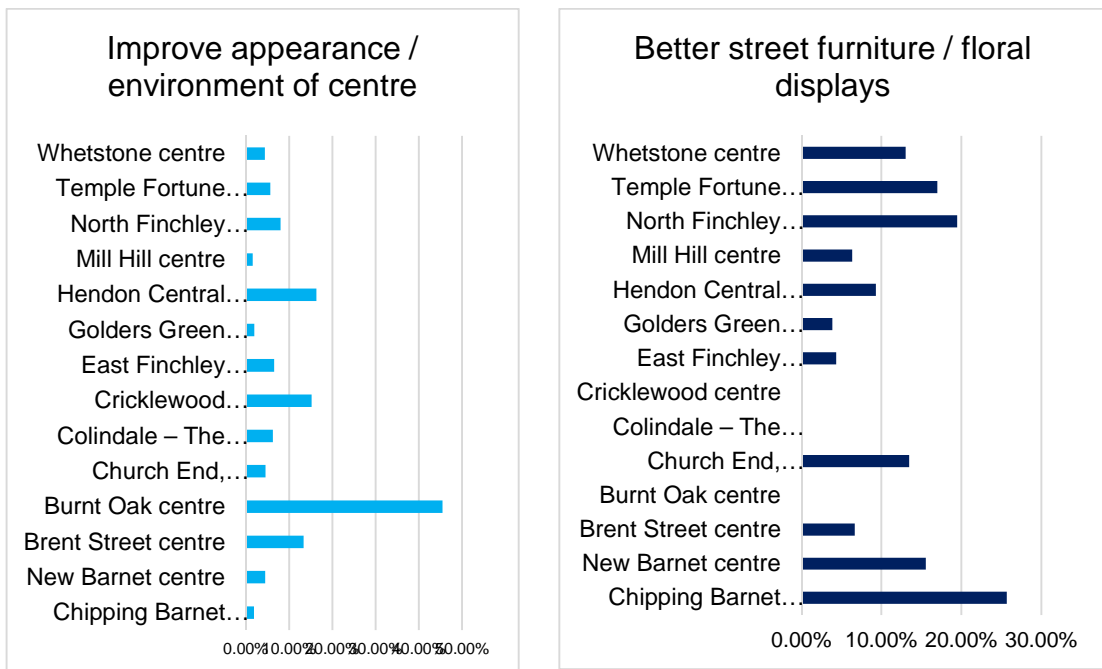
More accessible car parking



Source: PBA based on NEMS Household survey (May 2017)

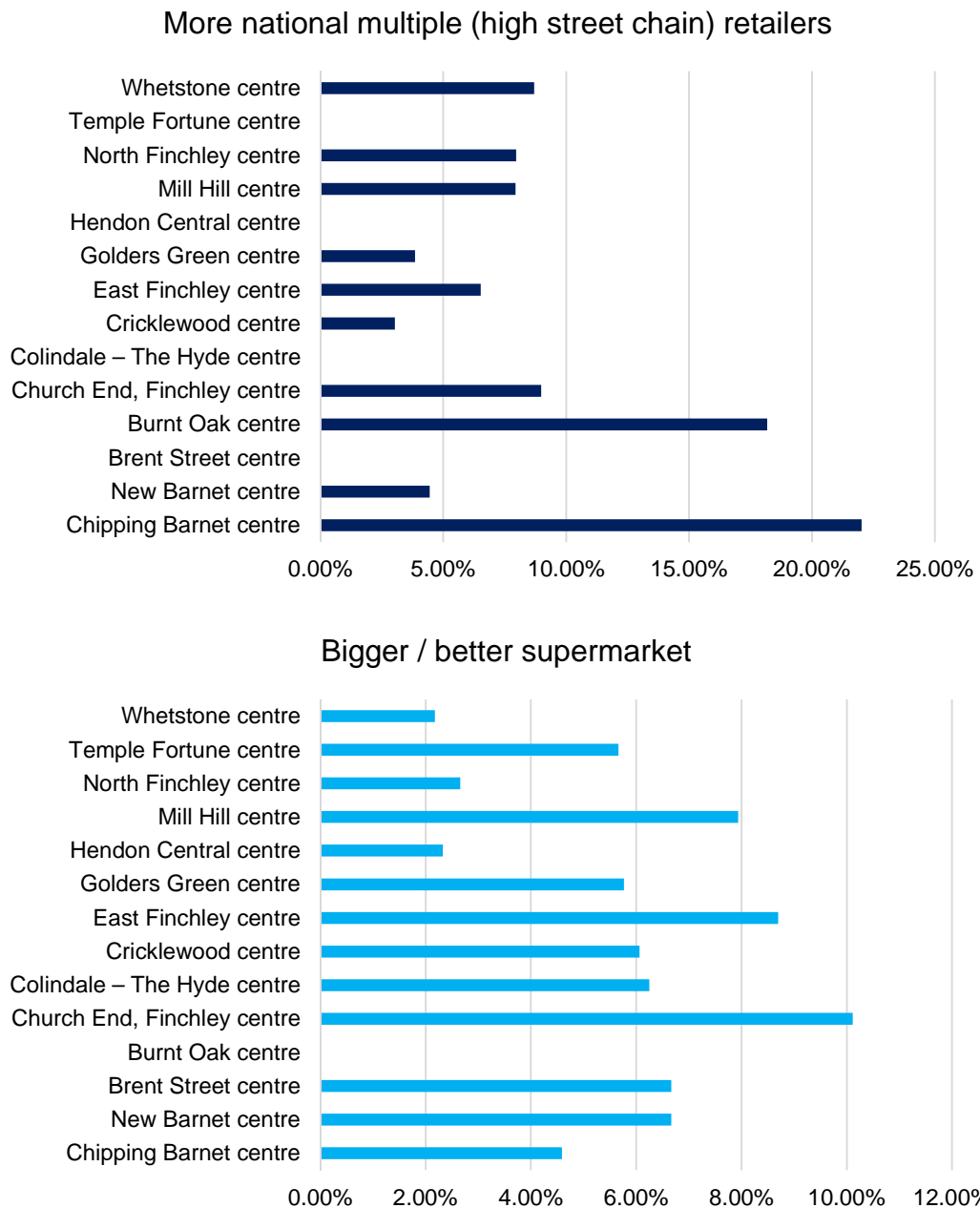
Figure 8.4 Analysis of responses relating to environmental issues





Source: PBA based on NEMS Household survey (May 2017)

Figure 8.5 Analysis of responses relating to shopping provision



Source: PBA based on NEMS Household survey (May 2017)

8.19 In terms of leisure uses the Chipping Barnet health check (Appendix B) identifies that the centre has a good food and drink offer in terms of consumer choice and quality. The centre also has a range of complimentary D2 leisure uses including a 24-hour gym and a theatre while the Everyman Barnet Cinema is located to the south of the centre. The quantitative leisure assessment (section 7) and Table L11 (Appendix J) shows there is capacity for additional food and drink (A3-A5) floorspace in Chipping Barnet across the study period. The cinema capacity assessment (Table L12, Appendix J) shows there is capacity for 14 additional cinema screens across the

study period. Subject to the identification of sites Chipping Barnet may be a suitable location for additional cinema screens since it is an established leisure destination with the fourth highest food and drink market share of all district centres.

- 8.20 According to the survey Chipping Barnet has the second lowest user satisfaction rate (16%) amongst respondents which is reflected by respondents suggested improvements which include: more accessible (33%) and cheaper (22%) car parking, better street furniture (26%) and more green spaces (24%). There is a clear message from the survey that the centre requires further investment in the public realm to enhance the existing retail provision.
- 8.21 There is an active Town Team within the centre known as 'Love Barnet'¹³ which are seeking to promote and enhance the centre. As set out in Section 4, the Chipping Barnet TCF outlines a series of objectives intended to create the right environment for a vibrant and viable town centre. Some of these objectives are being addressed through the expansion and reconfiguration of the Spires Shopping Centre; however, the centre would also benefit from public realm works and upgrading the existing building stock as part of a wider programme of investment. Overall we consider that the centre functions in line with its position in the hierarchy

New Barnet

- 8.22 Our health check assessment found that New Barnet is in moderate health owing to the limited range of convenience and comparison retail offer present. The convenience offer is largely limited to a single large Sainsbury's foodstore. Whilst this doesn't offer choice and competition within the centre, it does act as a key anchor attracting footfall. Though the centre has clear qualitative deficiencies in both convenience and comparison categories, it is important to note that only 4% of respondents stated that they thought the centre required additional multiple retailer provision.
- 8.23 Therefore, it is important to have regard to the role and function of New Barnet which meets local retail needs, distinct from the larger district centres. That is not to say improvements are required as the quality of the current provision is variable as reflected by the survey results. According to the survey, 16% of respondents wish to see a better quality environment and 13% consider more green space in the centre is required. Indeed, New Barnet is third lowest in user satisfaction with 27% stating that 'no further improvement' was required for the centre.
- 8.24 There is scope for increased expenditure in the centre through the redevelopment of the Gas Works and other smaller development opportunities within the New Barnet TCF. We also note that there is a new leisure centre proposed near to the Victoria recreation ground. While outside the town centre, it is will nevertheless be an attractor to New Barnet and could assist in increasing footfall in the centre. We consider that there is a qualitative need for enhancements to New Barnet to provide an increase in

¹³ Their website is <http://www.lovebarnet.co.uk/> and they are also active on Facebook - <https://en-gb.facebook.com/Chipping-Barnet-Town-Team-300087863519041/>

convenience and comparison provision within the centre, so enhancing choice and improving its current health.

- 8.25 In terms of leisure uses, the New Barnet health check (Appendix B) identifies that the centre provides a low-quality food and drink offer with a mix of takeaways, restaurants and pubs. There is no local cinema, theatre or bowling alley although there are a number of gyms/fitness centres located in and on the edge of the centre. The quantitative leisure assessment (section 7) and Table L11 (Appendix J) shows there is limited capacity for additional food and drink (A3-A5) floorspace in New Barnet across the study period. There is potential to increase the leisure turnover of New Barnet by diversifying the food and drink offer to include more mid- to high-quality operators and providing additional floorspace above that forecast in the quantitative assessment.
- 8.26 According to the survey New Barnet has a relatively low user satisfaction rate with just 27% respondents suggesting that no improvements are required. For New Barnet, the three most popular suggested improvements included: more parking (18%), cheaper parking (16%) and a better choice of shops in general (16%). The survey results indicate that there is local demand for an improved choice of shops and to improve the accessibility of the centre however the New Barnet health check (Appendix B) identifies that the centre is well served by existing car parks.

Brent Street

- 8.27 Our health check indicates that the centre is considered to underperform against a number of key health indicators. Convenience provision is limited with a Tesco Metro being the only significant multiple convenience retailer within the Sentinel Shopping Centre. Similarly, comparison provision is low for a centre of this scale and is not providing currently providing sufficient choice and competition. Therefore, there is a qualitative need for both additional convenience and comparison provision.
- 8.28 Achieving significantly improved comparison and convenience provision in the centre is unlikely because of the close proximity of Brent Cross. Notwithstanding this, the centre has adapted its provision to focus on independent retailers as well as a much higher level of service provision. This is bolstered by an active student population from the nearby Middlesex University, who also create demand for food and drink uses within the centre. The user perception survey recorded the highest satisfaction figure for Brent Street with 53% of respondents stating that they would not make any improvements to the centre.
- 8.29 However, in light of the capacity forecasts in Section 6, highlighting that there is no need for additional convenience retail floorspace to 2036, and only a need for additional comparison floorspace from 2021, we consider small-scale improvements and enhancements to the centre are appropriate. This will provide a differentiated offer from Brent Cross and address the qualitative gaps and relative underperformance of the centre.
- 8.30 In terms of leisure uses the Brent Street health check (Appendix B) identifies that the centre has limited provision of restaurants and drinking establishments and no

cinema or bowling alley. The quantitative leisure assessment (section 7) and Table L11 (Appendix J) shows there is minimal need for additional food and drink (A3-A5) floorspace in Brent Street across the study period. However, since the quantitative food and drink assessment is based on current market shares the capacity forecasts reflect the fact that the current food and drink offer is of poor quality. There is potential to improve the leisure turnover of Brent Street and generate increased evening activity by increasing the provision of food and drink floorspace above that forecast in the quantitative assessment., particularly in light of the nearby student population. Physical interventions to improve the quality of the public realm could also enhance Brent Street as an evening leisure destination.

- 8.31 For Brent Street the three most popular suggestions included: improve appearance/environment of centre (13%), more parking (10%) and cheaper parking (10%). The survey results indicate that there is a need to improve both the appearance and accessibility of the centre.

Burnt Oak

- 8.32 Our assessment of Burnt Oak's health has found that while it is performing well against most of the indicators, the overall health of the centre is undermined by qualitative deficiencies in both the centre's offer and environment.
- 8.33 The centre has a significantly above average convenience retail and service provision as a consequence of its strong independent offer. The centre is predominantly characterised by purpose built parades of shops which limits the potential for multiple retailers to occupy the centre. It is part of Burnt Oak's role and function to offer a local and diverse level of independent convenience and comparison provision. Respondents identified the need for additional multiple retailers as a potential improvement to the town centre (18%), which underlines the view that there is a qualitative gap in provision within the centre.
- 8.34 However, addressing these deficiencies does not necessarily indicate a need for expansion; the dominance of the road network in the centre means that there are limited site opportunities for such expansion. This is also supported by the retail capacity forecasts in Section 6, highlighting that there is no need for additional convenience retail floorspace to 2036, and only a need for additional comparison floorspace from 2021. Instead opportunities to upgrade the existing space within the centre should be considered.
- 8.35 In terms of leisure uses the Burnt Oak health check (Appendix B) identifies that the centre is dominated by cafes, restaurants and takeaways which are generally poor quality and provide limited consumer choice. The centre has no local theatre, cinema or gym. The quantitative leisure assessment (section 7) and Table L11 (Appendix J) shows there is limited capacity for additional food and drink (A3-A5) floorspace in Burnt Oak across the study period. There is potential to improve the leisure turnover of Burnt Oak by diversifying the food and drink offer and providing additional floorspace above that forecast in the quantitative assessment. Physical interventions to improve the quality of the public realm could also enhance Burnt Oak as an evening leisure destination.

- 8.36 Consultation on a Burnt Oak TCS was undertaken in May 2017 which seeks the delivery of a number of public realm improvements to Burnt Oak. While the strategy has not yet been finalised, funding to undertake public realm improvements has been made available which should enhance the quality of the centre. In addition, the ‘Love Burnt Oak’ community group is a very active in Burnt Oak and seeks to promote local services and in the centre.
- 8.37 The user perception survey recorded the lowest satisfaction figure for Burnt Oak at just 9% however it should be borne in mind that the results are based on the very small sample and therefore should be treated with caution. However, the survey identified a clear message from respondents regarding the overall need to improve the environmental quality of the centre. For Burnt Oak, the three most popular suggested improvements included: cleaner streets/removal of litter (55%), improve appearance/environment of centre (45%) and better street furniture/floral displays (26%).

Chipping Barnet

- 8.38 Our health check assessment in Appendix B indicates that the centre is performing well overall, underpinned by both the multiple and independent retailers present. The centre also has a high proportion of students due to the presence of Barnet and Southgate College which has a pronounced effect on spending patterns within the centre, though the level of this may be difficult to fully capture through a household survey.
- 8.39 The household survey results indicate Chipping Barnet exerts a dominant position within zone 1, reflecting the more extensive convenience provision present anchored by the Waitrose store within the Spires Shopping Centre. The strong convenience retail representation is demonstrated by the relatively low response (5%) of those suggesting bigger or better supermarkets in Chipping Barnet. We therefore consider that the convenience offer provides good choice and competition and that there is not a qualitative gap in convenience provision in Chipping Barnet.
- 8.40 Despite the good level of representation of national multiple retailers in the centre, 22% of respondents to the household survey suggested Chipping Barnet needed more national multiples, which is the highest figure of all district centres. This is likely to reflect the ongoing investment in the Spires Shopping Centre which is seeking to attract further midscale retailers. Therefore, this qualitative need for enhanced national multiple provision is being addressed through the redevelopment and that further retail development is not necessary within the centre. In any case, based on the capacity forecasts in Section 6 there is no need for additional convenience retail floorspace to 2036 and only a need for additional comparison floorspace from 2021.

Colindale -The Hyde

- 8.41 As we note in the health check, Colindale is underperforming as a centre and appears to function more as a local centre. The retail offer is dominated by small independent convenience and service provision. Despite this, 44% of respondents to

the survey stated that no improvements are required to the centre which suggests a relatively high level of satisfaction with the current role of the centre.

- 8.42 A key gap in provision is the lack of comparison retailers. However, the property offer is mainly comprised of small floorplate retail units which are not suited to meet the requirements of modern retailers and there are not any development opportunities to accommodate such provision. Furthermore, the close proximity of out-of-town retail parks (Colindale Retail Park and Silkbridge Retail Park) means there is unlikely to be significant commercial demand for space in the centre. The survey results showed that respondents do not consider Colindale to be a main comparison shopping destination- and no respondents suggested that additional multiple retailers were required. For these reasons we consider that it is unlikely that significant new comparison retail floorspace will be delivered by the market in this centre.
- 8.43 In terms of leisure uses the Colindale health check (Appendix B) identifies that the leisure offer is dominated by cafes, restaurants, takeaways and pubs which are generally poor quality and provide limited consumer choice. The quantitative leisure assessment (section 7) and Table L11 (Appendix J) shows there is limited capacity for additional food and drink (A3-A5) floorspace in Colindale across the study period. There is potential to improve the leisure turnover of Colindale by diversifying the food and drink offer and providing additional floorspace above that forecast in the quantitative assessment. Physical interventions to improve the quality of the public realm could also enhance Colindale as an evening leisure destination.
- 8.44 For Colindale, we consider that the centre environment and quality of the retail offer both require improvement. The three most popular suggested improvements from the survey included: cleaner streets/removal of litter (19%), more parking (19%) and improve appearance/environment of centre (13%). If improvements cannot be secured over the study period, while this require discussion with LB Brent, we consider the position of the centre within the retail hierarchy should be reviewed.

Cricklewood

- 8.45 Our health check identifies that the centre is performing well due to the relatively higher quality convenience provision, good quality – though limited – independent comparison retailers and the high level of cafes and restaurants. A relatively high level of satisfaction was suggested by the survey with 36% of respondents not proposing any town centre improvements.
- 8.46 The survey indicates that visitors do not consider there to be any particular qualitative deficiency within the centre. However, in light of the potential redevelopment of the B&Q site, we consider that there is some scope for additional comparison retailing suited to multiple retailers, particularly with regard to the ambitions to deliver significant additional residential development as part of the regeneration framework. As we note in the health check it is important that the centre expand and improve its retail provision, to avoid the longer term risk of the status of the centre diminishing relative to others. Consideration will need to be given to the retail capacity forecasts in Section 6, which only identifies a need for additional comparison floorspace from 2021.

- 8.47 In terms of leisure uses the Cricklewood health check (Appendix B) identifies that the centre provides a good range of restaurants, bars, pubs and hot food takeaways although there are limited D2 leisure facilities with a bingo hall and two gyms on the edge of the centre but no local cinema or theatre. The quantitative leisure assessment (section 7) and Table L11 (Appendix J) shows there is limited capacity for additional food and drink (A3-A5) floorspace in Cricklewood across the study period. There is potential to increase the leisure turnover of Cricklewood by diversifying the food and drink offer to include more high quality operators and providing additional floorspace above that forecast in the quantitative assessment. Future investment in Cricklewood would need to be considered within the wider context of the Brent Cross Cricklewood regeneration area to ensure that new development is complementary to planned investment at Brent Cross.
- 8.48 For Cricklewood, the three most popular suggested improvements included: better choice of shops in general (15%), more independent shops (15%) and improve appearance / environment of centre (15%). The survey results indicate that there is local demand for an improved local retail offer in Cricklewood and in Section 9 we review development sites with potential to deliver additional retail floorspace.
- 8.49 Cricklewood has also been recently awarded £1.7m from the Outer London Fund to improve the environment and streetscape of the centre with new or improved public realm, street furniture and shopfronts. The funding is in recognition of the changes likely to occur from the expansion of Brent Cross. These improvements will enhance the attractiveness of Cricklewood and will build partnerships between the community and the constituent authorities (LBB, LB Brent, LB Camden) for future delivery. In addition, Cricklewood has an active Town Team that manage the town centre environment including event and activities, town centre improvements and community participation.

East Finchley

- 8.50 The East Finchley health check concludes that overall the centre is considered to be vital and viable with a strong in convenience and comparison retail offer appropriate to the centre's status as a district centre. The level of satisfaction from respondents identifies that 28% consider that no further improvements to the centre are necessary.
- 8.51 This is reinforced by the low responses that were recorded on potential improvements, with the exception of 9% who said that they thought a bigger supermarket would be beneficial.
- 8.52 The survey results indicate that there is some local demand to improve the diversity and quality of the retail offer and particularly the convenience offer. The three most popular suggested improvements included: bigger/better supermarket (20%), more independent shops (17%) and better choice of shops in general (11%). However, it must be borne in mind that the survey results are based on a small sample (22 respondent's).

- 8.53 However, there are limited current development opportunities to accommodate new retail floorspace and there is no quantitative need for additional convenience retail floorspace in LBB across the study period. On that basis we consider that there is no requirement to deliver additional comparison or convenience floorspace over the study period.
- 8.54 In terms of leisure uses the East Finchley health check (Appendix B) identifies that the centre provides a good range of leisure uses which provide for consumer choice and quality with the Phoenix Cinema and Finchley Youth Theatre and a range of pubs, cafes, takeaways and restaurants. There are therefore no clear gaps have been identified in the leisure offer. The quantitative leisure assessment (section 7) and Table L11 (Appendix J) shows there is capacity for additional food and drink (A3-A5) floorspace in East Finchley across the study period.

Finchley Church End

- 8.55 Our health check assessment has found that Finchley Church End is performing satisfactorily with convenience and service orientated offer which is anchored by a Tesco and a Sainsbury's Local convenience store and enhanced by a varied independent offer comprised of international grocers and specialised food stores. However, the health check found that the centre contains a limited range of national multiples. This is affirmed by the survey: 9% of respondent's stated that they would like to see more national multiple retailers. We consider that there is a qualitative gap in the comparison retail offer and that there is scope to improve consumer choice. 10% of respondents stated that they would like to see a bigger / better supermarket provision however the health check found that the centre has a strong convenience offer with a number of national multiple retail retailers (Tesco and Sainsbury's).
- 8.56 Finchley Church End contains a number of development opportunities, reviewed in Section 9, with potential to accommodate new national multiple comparison retailers. These are informed by the Finchley Church End Town Centre Strategy (2012), which identifies a number of potential development opportunities as well as a number of environmental improvements such as public realm enhancements and reconfiguration of the key junctions between Ballards Lane, Nether Street and Chaville Way. However, when planning for future investment it should be noted that there is no quantitative need for comparison floorspace (Section 6) until 2021.
- 8.57 In terms of leisure uses the Finchley Church End health check (Appendix B) identifies that the leisure offer is dominated by cafes, restaurants and takeaways. The centre lacks evening leisure uses with a limited number of bars and pubs and no local cinema or theatre. The quantitative leisure assessment (section 7) and Table L11 (Appendix J) shows there is capacity for additional food and drink (A3-A5) floorspace in Finchley Church End across the study period. There is also potential to improve the leisure turnover of in the centre and to generate increased evening activity by diversifying the food and drink offer to include night-time leisure uses. Subject to the identification of sites Finchley Church End may also be a suitable location for additional cinema screens since it is an established leisure destination with the third highest food and drink market share of all district centres. Whilst cinema provision is

most likely to be new build, there is the potential for conversion of existing underutilised buildings for an independent boutique cinema such as King Edward's Hall on Regents Park Road.

- 8.58 According to the survey Finchley Church End has a moderate user satisfaction rate with 33% of respondents suggesting that no improvements are required. The three most popular suggested improvements included: better choice of shops in general (15%), cheaper parking (13%) and more national multiple retailers (12%). The survey results reaffirm our recommendation that there is scope to improve the diversity and quality of the comparison retail offer through the introduction of additional national multiple retailers.

Golders Green

- 8.59 We conclude in our health check that overall the centre is vital and viable, having a reasonably strong level of convenience provision, albeit a comparatively lower level of comparison retail provision. Respondents generally indicated a high level of satisfaction with the centres with 48% considering that no further improvements to the centre are necessary. There was a generally very low level of response recorded on potential retail and environmental improvements (see figures 8.3 to 8.5), with the exception of 6% who said that they thought a bigger supermarket would be beneficial.
- 8.60 In light of the limited available development opportunities to accommodate any retail growth and the strong existing provision, we do consider that there is a qualitative need for significant additional comparison or convenience provision over the report period. Instead, improvements to the quality of existing retail units is the most beneficial route to achieve maintain the centre's position within the hierarchy.
- 8.61 In terms of leisure uses the Golders Green health check (Appendix B) identifies that the centre has a mixed food and drink offer with a variety of restaurants, cafes, pubs and takeaways which provide some consumer choice, however there is scope for improvement. D2 leisure provision is limited with no local cinema, theatre or bowling alley although there are a number of fitness centres. The quantitative leisure assessment (section 7) and Table L11 (Appendix J) shows there is capacity for additional food and drink (A3-A5) floorspace in Golders Green across the study period. There is potential to increase the leisure turnover of Golders Green by diversifying the food and drink offer to include more mid to high quality food and drink operators and additional D2 leisure uses.
- 8.62 For Golders Green, the three most popular suggested improvements included: more parking (15%), cleaner streets / removal of litter (13%) and more independent shops (10%). The survey results indicate that there is local demand to improve diversity of the shopping offer in Golders Green. The survey responses reflect the findings of the Golders Green health check which identifies that the centre has a significantly lower proportion of comparison retail floorspace compared to the national average.

Hendon Central

- 8.63 As we note in our health check in Appendix B, the centre is performing generally well and predominantly focussed on convenience and service provision, with a

significantly lower level of comparison retail provision. The level of satisfaction with the centre is 35% based on those respondents who stated that they didn't think any improvements to the centre were necessary. This also corresponds with the low level of response in relation to potential improvements to the town centre (see figures 8.3 to 8.5), with no one response standing out. While there is a qualitative gap within the centre as a result of the relative lack of comparison retailing, particularly from multiple retailers, the close proximity of the centre to Brent Cross makes it unfeasible to expect any significant comparison growth within the centre. Therefore, qualitative comparison and convenience improvements need to focus on enhancements to the existing provision.

- 8.64 In terms of leisure uses the Hendon health check (Appendix B) identifies that the centre has a mixed food and drink offer comprised of restaurants, cafes, pubs and takeaways which are mid to low quality. The D2 leisure offer is limited with a number of gyms/fitness centres but no local cinema, theatre or bowling alley. The quantitative leisure assessment (section 7) and Table L11 (Appendix J) shows there is capacity for additional food and drink (A3-A5) floorspace in Hendon across the study period. There is potential to increase the leisure turnover of Hendon by diversifying the food and drink offer to include more mid to high quality food and drink operators and additional D2 leisure uses. Future investment in Hendon would need to be considered within the wider context of the Brent Cross Cricklewood regeneration area to ensure that new development is complimentary to planned investment at Brent Cross.
- 8.65 For Hendon, the three most popular suggested improvements included: more parking (16%), improve appearance/environment of centre (16%) and cleaner streets/removal of litter (14%). The survey results indicate that there is a qualitative need to improve the environmental quality and accessibility of the centre. The survey results affirm the health check findings; that the environmental quality of the centre is variable and certain parts of the centre could benefit from investment in an upgraded public realm. However, the health check (Appendix B) identifies that the centre is well served by existing car parks.

Mill Hill

- 8.66 As discussed in the health check, Mill Hill, is performing well due to the relatively strong presence of key multiple comparison and convenience retailers and varied mix of independent retailers. This is not fully reflected in the level of satisfaction from respondents which identifies that 27% consider that no further improvements to the centre are necessary. In general, there is also a low level of response to potential on potential retail and environmental improvements (see figures 8.3 to 8.5). In light of the very limited available development opportunities to accommodate any retail growth and the relatively strong existing provision, we consider that there is not a qualitative need for significant additional comparison or convenience provision over the reporting period. Instead, improvements to the quality of existing retail units is the most beneficial route to achieve maintain the centre's position within the hierarchy.
- 8.67 In terms of leisure uses the Mill Hill health check (Appendix B) identifies that the centre provides a good range of restaurants, bars and hot food takeaways although

there are limited D2 leisure facilities with a gym but no local cinema or theatre. The quantitative leisure assessment (section 7) and Table L11 (Appendix J) shows there is capacity for additional food and drink (A3-A5) floorspace in Mill Hill across the study period. Subject to the identification of sites, Mill Hill may be a suitable location for additional cinema screens since it is an established leisure destination with the fifth highest food and drink market share of all district centres. The provision of a new cinema would complement the existing food and drink outlets and generate increased night-time activity in Mill Hill.

- 8.68 The survey results indicate the accessibility to the centre is an important consideration for local residents visiting Mill Hill is a main shopping destination. For Mill Hill, the three most popular suggested improvements included: more parking (27%), better choice of parking (22%) and more priority for pedestrians (11%).
- 8.69 Mill Hill has an active neighbourhood forum which seeks to promote the centre particularly in relation to changing requirements through running events and activities such as the monthly French market. They also have been actively involved in informing and influencing planning policy to promote improvements to Mill Hill.

North Finchley

- 8.70 As summarised in our health check, North Finchley centre is performing reasonably well due to the presence of key comparison and convenience multiple retailers, as well as a varied mix of independent retailers. We therefore consider that the functioning of the centre is considered to be in line with the shopping hierarchy. The level of satisfaction with the centre is 32% based on those respondents who stated that they didn't think any improvements to the centre were necessary.
- 8.71 The survey results indicate that there is local demand for an improved shopping offer and to improve the accessibility of the centre. The three most popular suggested improvements included: more parking (32%), cheaper parking (21%) and better choice of shops in general (19%). However, the North Finchley health check identifies that the centre is well served by existing car parks. These responses and the generally low level of response in relation to other retail and environmental concerns indicate that there isn't any particular qualitative deficiency for additional convenience or comparison floorspace within the centre. In addition, there are relatively few potential development opportunities to accommodate new retail floorspace. However the emerging North Finchley Town Centre Framework SPD is seeking to identify regeneration opportunities at the centre Retail capacity forecasts in Section 6, highlight that there is no need for additional convenience retail floorspace to 2036, and only a need for additional comparison floorspace from 2021. Therefore, the short term the focus is likely to be limited to reconfiguration/ amalgamation of existing retail units. Should this position change and new site opportunities be identified through the local plan process, then there could be potential for accommodating additional convenience and comparison floorspace later in the study period.
- 8.72 In terms of leisure uses the North Finchley health check (Appendix B) identifies that the centre provides a good range of restaurants, bars, pubs and takeaways. However the centre does not contain a cinema or bowling alley although it does have a local

theatre (the Arts Depot), a number of gyms/health facilities and family entertainment venues. The quantitative leisure assessment (section 7) and Table L11 (Appendix J) shows there is substantial capacity for additional food and drink (A3-A5) floorspace in North Finchley across the study period. Subject to the identification of sites North Finchley may be a suitable location for additional cinema screens since it is an established leisure destination with the highest food and drink market share of all district centres. The provision of a new cinema would generate increased night-time activity to support the turnover of existing food and drink outlets. The future roll-out of the night-tube to North Finchley could potentially also bolster the evening economy.

Temple Fortune

- 8.73 Our findings from undertaking the health check assessment indicate that the centre is performing well overall. This is due to the strong anchor presence of key upscale multiple retailers, a number of key larger comparison multiples and a strong independent retail set within a pleasant town centre environment. Limited change to the centre has occurred since the previous study was undertaken and there are very few re-development and reconfiguration opportunities currently. The level of satisfaction with the centre is 40% based on those respondents who stated that they didn't think any improvements to the centre were necessary. This is high and indicates satisfaction with the quality of retail provision within the centre. In addition, the three most popular suggested improvements include: more parking, cheaper parking and more services. These factors together indicate that there isn't a qualitative requirement for additional convenience or comparison provision and that the centre already offers a reasonable level of choice and competition relative to its role and function. However, there is a risk of encroaching residential development (either through conversion or new build) leading to potential contraction of the centre in the longer term.
- 8.74 Just one respondent suggested the centre would benefit from additional services. However, the Temple Fortune health check (Appendix B) identifies that the centre provides a good range of services well in excess of the national average.
- 8.75 In terms of leisure uses the Temple Fortune health check (Appendix B) identifies that the centre provides a good mix of cafes, restaurants, takeaways and pubs which provide a good level of consumer choice. D2 leisure uses are limited with no commercial gym, local theatre or cinema present within the centre. The quantitative leisure assessment (section 7) and Table L11 (Appendix J) shows there is limited capacity for additional food and drink (A3-A5) floorspace in Temple Fortune across the study period.

Whetstone

- 8.76 Our health check assessment in Appendix B identifies that Whetstone is performing well due to the relatively upscale convenience provision and good quality, though limited, independent comparison offer. This indicates that the centre is functioning at a level appropriate to its position in the retail hierarchy. The level of satisfaction with the centre is 28% based on those respondents who stated that they didn't think any

improvements to the centre were necessary. This is lower than some and indicates that local residents wish to see changes.

- 8.77 The three most popular suggested improvements for Whetstone include: better choice of shops in general, more parking and more independent shops. The survey results indicate that there is a qualitative need for additional convenience and comparison provision within the centre. However, a key concern is that there are no available development opportunities to fill this gap and to ensure greater choice and competition. While change has taken place, these are all residential in nature and risk leading to the potential contraction of the centre over the longer term.
- 8.78 In terms of leisure uses, the Whetstone health check (Appendix B) identifies that the centre provides a good range of restaurants, bars, pubs and hot food takeaways although there is no local cinema, theatre or bowling alley. The quantitative leisure assessment (section 7) and Table L11 (Appendix J) shows there is substantial capacity for additional food and drink (A3-A5) floorspace in Whetstone across the study period. Subject to the identification of sites, Whetstone could be a suitable location for additional cinema screens since it is an established leisure destination with the second highest food and drink market share of all district centres. However, Whetstone is in close proximity to the Everyman cinema on Great North Road and therefore may not be commercially attractive. Furthermore, the future roll-out of the night-tube to Whetstone potentially may bolster the evening economy.
- 8.79 For Whetstone, the three most popular suggested improvements included: better choice of shops in general, more parking and more independent shops. The survey results indicate that there is local demand for an improved choice of shops, particularly independent shops, and to improve the accessibility of the centre. However, the Whetstone health check (Appendix B) identifies that the centre is well served by existing car parks.
- 8.80 Overall we consider Whetstone is performing well, which is reflected in Whetstone being ranked the healthiest high street in London in 2015¹⁴ out of 144 high streets. Nevertheless, we have concerns about the centre's longer term ability to sustain this position in the future due to the limited development opportunities available.

Brent Cross

- 8.81 Brent Cross Shopping Centre is trading extremely successfully with all 125 current retail units being fully let at the time of our survey. As a purpose built shopping centre in the 1970s, then subsequently remodelled in the 1990s, the provision is substantially focussed on comparison retailing. This accounts for 70% of all the units with only two units currently occupied by convenience retailers. The remaining units are occupied by commercial leisure uses.
- 8.82 The household survey indicates that 50% of respondents in the perception survey state that they thought no further improvements to shopping centre were required.

¹⁴ Ranking undertaken by the Royal Society for Public Health in 2015,

This is a high level of satisfaction and indicates in general terms that residents find the retail offer of Brent Cross meets their needs. The largest response from the household survey indicated that 14% of respondents thought that they would like to see better shops in general, however this is based on only a small sample of 11 people.

- 8.83 As mentioned in the report previously, Brent Cross will undergo a significant redevelopment in the next five years which will ultimately double its size. This will undoubtedly be a step change in the quantum and range of offer provided at the centre. Therefore, assessments of the current health and attractiveness of Brent Cross Shopping Centre will become rapidly out of date. Nevertheless, as one of the first shopping centres, Brent Cross is an established location and has consistently shown a strong performance. LBB's town centres will need to adjust to this change particularly in light of proposed additional food and drink, leisure and restaurant uses being introduced which could lead to competition and overlap.

Summary

- 8.84 We have assessed the various qualitative factors in relation to Barnet's major, district and regional shopping centres informed by the health check assessments of the town centres in Appendix B and following an analysis of the household survey undertaken in support of this study which included a number of questions to understand local residents' opinions of centres within LBB. Specifically, we have assessed the suggested improvements to the centres to inform our consideration of qualitative needs and any identified gaps in current provision within the centres taking into account:

- The position of the centre within LBB's retail hierarchy;
- The specific role and function of the centre within that hierarchy;
- The need to meet a range of identified shopping requirements; and
- The need to minimise expenditure leakage and promote sustainable patterns of shopping.
- The likely achievability of these ambitions:
- The projected available comparison and convenience capacity over the plan period as identified in Section 6; and
- How this fits with current and emerging retail trends as outlined in Section 4.

Key findings

- Edgware is currently performing well with good satisfaction levels identified and that there are no significant gaps in retail and service provision.
- Chipping Barnet, New Barnet, Burnt Oak, East Finchley, Golders Green, Hendon Central, Mill Hill, Temple Fortune and currently performing reasonably well with generally good satisfaction levels identified and that there are no significant gaps in retail and service provision.
- North Finchley and Whetstone are currently performing generally well with good satisfaction levels identified, however there are some qualitative gaps in provision present however there are no suitable development opportunities at present to accommodate additional comparison and convenience retail needs.
- Finchley Church End is performing satisfactorily, however there is a qualitative need for additional comparison retail provision. There are currently a number of development opportunities available to meet this need.
- Brent Street and Colindale - The Hyde are underperforming as centres and lack suitable opportunities to address deficiencies which risks further decline over the study period.
- All major and district centres have the potential to accommodate additional commercial leisure uses commensurate with available opportunities and role and function of each centre.
- Brent Cross is performing well with full occupancy though is about to undergo substantial redevelopment which will significantly increase its dominant role within the Borough

9 DEVELOPMENT OPPORTUNITY SITES

Introduction

- 9.1 The NPPF requires that local planning authorities allocate a range of sites to meet its needs for main town centre uses.
- 9.2 As set out in previous sections, there is considered to be no need to plan for any convenience provision over the plan period. With regard to comparison goods, capacity is only identified from 2021 onwards i.e. in the period of the study that PBA recommend exercising caution in relying those figures.
- 9.3 Furthermore, as set out in Section 8, comparison floorspace is more capable of trading at a higher density without resulting in qualitative deficiencies; thereby capturing potentially a significant proportion of forecast residual comparison expenditure.

Site assessments

- 9.4 The following table summarises the sites identified through the health checks, existing policy documents and other evidence base documents.

Table 9.1 Opportunity site assessments

Site	Size (ha)	Details	Relevant planning history	Conclusions
Chipping Barnet				
Territorial Army, Chipping Barnet	1.29	Edge of centre site on St Albans Road. Considered a significant development opportunity.	None	No evidence that the site will come forward for redevelopment. Given its separation from the main town centre, and the size of the site, likely to be most suited to residential-led development.
Barnet market, Chipping Barnet	0.142	Historic and popular market, with a key role to play in the character and vitality of the town centre.	None	The TCS aims to secure the future of Barnet market, so that it is able to effectively contribute to the town centre economy. This study has not considered capacity for street market spending. Not considered to be suitable for accommodating retail or leisure capacity but improvements to market facilities would be beneficial town centre vitality and viability.

Site	Size (ha)	Details	Relevant planning history	Conclusions
The Spires Shopping Centre, Chipping Barnet	1.46	Comprises nearly 8,400sqm of retail space and includes a car park and medium-sized Waitrose foodstore. At the time of the TCS adoption, the current owners were developing plans for improvement and expansion of the centre. At present the entrance to the centre is hidden from view, and as such future works hope to open up the entrance.	This site is subject to various planning applications, the majority of which are for the change of use of existing units. Permission 16/0288/FUL is for the extension of existing units, and associated public realm works.	The approved refurbishment and extension is likely to enable sales density improvements rather than accommodate significant floorspace growth.
Land to the rear of 120-204 High Street, Chipping Barnet	0.807	The High Street has been vulnerable to increased vacancy rates in recent years. Therefore, there is an opportunity to develop the units on the High Street. It is considered that doing so would help to create a 'retail triangle' between the Market and the Spires.	The central section of this site has planning permission which has not yet been implemented (reference 16/2466/FUL for the demolition of existing buildings, and the erection of a new three-storey building to provide flexible use class B floorspace, and the erection of a new four-storey residential building to provide 32 self-contained units and 8 semi-detached houses.) A planning brief has also been produced for the site.	Unlikely to be available for town centre uses.
Marie Foster site, Chipping Barnet	1.45	Former NHS site, identified as an opportunity area. Out of centre	None	The site is some distance from an identified centre and is therefore not regarded as suitable for accommodating town centre uses.
Edgware				
Broadwalk Shopping Centre car park, Edgware	4.62	There is an opportunity to consolidate the car parking and enable additional development to be accommodated within this highly sustainable location. This site is most likely to suit an extension for retail purposes, although leisure uses such as a cinema and associated food and drink would be considered appropriate. Proposals on this site should also improve connectivity to the town centre. The	This site is subject to planning permission H/00829/13 for alterations and refurbishment to the Station Road façade, including alterations to first floor level, various forms of re-cladding, and a change of use of Unit 1 from A1 to A2.	No evidence of major extension or refurbishment planned. Signs of investment but primarily likely to enable sales density improvements rather than accommodate significant floorspace growth.

Site	Size (ha)	Details	Relevant planning history	Conclusions
		development of this site will also have to provide a similar quantum of car parking to what currently exists.		
Forumside sites including former Post Office and health clinic, Edgware	1.55	This site could incorporate residential-led development with an appropriate mix of town centre uses, including a hotel. Development on this site must include active street frontages, in order to aid the delivery of the new street proposed under Element 3 of the Spatial Strategy.	Part of this site is subject to planning permission H/04849/11 for the temporary change of use of first floor D1 to B1, and ground floor A1 to D1 for a period of three years. LBB is in discussions with a Developer on devising a PPA for Forumside/ railway hotel sites in accordance with its adopted town centre development framework.	Suitable for redevelopment to accommodate main town centre uses.
Land around Premier House and Station Road frontage, Edgware	0.712	This site presents an opportunity to provide improved commercial units along Station Road, and transform a section of building frontage within the town centre. A mix of uses would be appropriate here, including retail, office, and residential.	None	Currently in main town centre use. Redevelopment could improve the quality rather than increase the quantum of floorspace.
Finchley				
401-405 Nether Street, Finchley	0.1	An existing office building with short to medium term opportunities.	None	Ground floors could accommodate town centre uses but capacity to accommodate significant floorspace limited.
Winston House and 2-4 Dollis Park, Finchley	0.6	Planning permission was granted for the redevelopment of this site in March 2012 (F/00497/11). Redevelopment has now taken place with a Travelodge and a Sainsbury's Local on site.	This site is subject to planning permission F/00497/11 for the extension and refurbishment of the site, comprising the change of use of fourth floor from offices to hotel, and a two storey roof extension to provide a 119-bedroom hotel.	No scope to accommodate significant additional main town centre uses.
Gateway House, Finchley	0.2	This is a modernist office block set back from the street. The current scale and height of the building is at odds with those that surround it.	This site is subject to planning permission F/03933/13. The scheme involves the demolition of existing buildings and the redevelopment of the site to provide 77 residential flats, office floorspace, 501sqm retail	Small-scale town centre uses as part of redevelopment.

Site	Size (ha)	Details	Relevant planning history	Conclusions
			space, a library, car parking, and communal amenity space. The site is now under construction with completion due shortly.	
290-298 Nether Street, Finchley	0.3	Currently occupied by a single-storey bar and restaurant, a mini-cab firm and a car wash business. As a result of its poor quality buildings, numerous advertisements and the cluttered nature of the site make this site have a negative impact on the townscape.	None	Currently in main town centre use
Finchley Central station car park	0.7	The site is predominantly used as a car park for commuters (260 spaces). This is a key arrival location for many, but it has a poor-quality pedestrian environment, which requires enhancement.	None	No evidence of development proposals coming forward and expected that it will continue to be used for station car parking. Not available over the study period
Station Road, Finchley	0.4	The site comprises a number of single-storey retail units, some offices and a builders' yard. The buildings are all generally of poor quality, and fail to make effective use of the land. As an entrance point to the town centre, this is also a site which could be improved.	None	No evidence that the site will come forward for redevelopment but any proposals that improve the entrance to the town centre should be supported.
Central House and 1-9 Ballards Lane, Finchley	0.1	This is a nine storey 1960s office block located in a prominent position. It currently provides low cost office space. It is significantly taller than the surrounding buildings, therefore relating poorly to them. The ground floor contains retail, takeaway and bar uses. The site could be suitable for comprehensive redevelopment.	None	The site currently has town centre uses on it and while it may come forward for redevelopment, it is likely to comprise a like-for-like replacement than significant uplift in floorspace.
Ballards Lane, Finchley	1	This site is situated within the main retail area of Finchley Church End, and it currently incorporates the current Tesco and multi-storey car park, with offices in the top two	None	While redevelopment, which would improve the town centre environment, may take place during the study period, unlikely to result in significant additional floorspace.

Site	Size (ha)	Details	Relevant planning history	Conclusions
		storeys of the building. This site could be suitable for comprehensive redevelopment to improve the site.		
New Barnet				
The former East Barnet Gas Works and surrounding land, New Barnet	5.35	This is a large, level, development site in an edge-of-centre location. Appropriate development on site would include new public space, mixed use area for food/drink uses, community uses, plus a range of office and leisure facilities, alongside residential. Retail is not considered an appropriate use, as there are sequentially preferable sites elsewhere.	This site is subject to planning permission B/04834/14, for the residential-led mixed use development of the site, comprising 305 residential units, 116 sqm retail space, and 558 sqm flexible commercial floorspace, new public open space and pedestrian routes, together with associated landscaping.	No longer available for further town centre uses but committed scheme will deliver ancillary retail and leisure floorspaces.
The former Optex site and surrounding land, New Barnet	1.28	This is a large, level, area of potential change, locating in-centre. Appropriate uses include residential with retail units at ground floor levels.	Permission for residential development (B/00937/13).	No longer available – redeveloped for housing.
Sainsbury's, New Barnet	1.01	This site comprises a Sainsbury's and car parking. It is located partially within the centre and edge-of-centre. Appropriate uses for the site include retail at ground floor levels, and a mix of residential, office and community uses on upper floors.	Small-scale amendments to existing store.	While redevelopment, which would improve the town centre environment, may take place during the study period, unlikely to result in significant additional floorspace.
Site at corner of East Barnet Road and Victoria Road, New Barnet	0.021	This is a vacant derelict building located in-centre. Appropriate uses include retail at ground floor level, with residential, office or community uses appropriate for the upper floors	None	No longer available – redeveloped for housing.
Fayers Building Yard, New Barnet	0.178	This is a builders' merchants and church hall located in-centre. Appropriate uses include retail at ground floor level, with residential, office or community uses	None	Suitable for small-scale town centre uses.

Site	Size (ha)	Details	Relevant planning history	Conclusions
		appropriate for the upper floors		
Approach Road, New Barnet	0.063	At the time of allocation, this was a car wash located edge-of-centre.	Residential development.	Redeveloped for residential use.
Station Approach Towers, New Barnet	0.346	This is a block of residential dwellings and offices, in an edge-of-centre location.	None	Appropriate uses include residential, office and community. Suitable for small-scale town centre uses.
Station Road Towers, New Barnet	0.529	This is a block of residential dwellings and offices, in an edge-of-centre location.		Appropriate uses include residential, office and community.
Whetstone				
A1 Self Storage, Whetstone	0.853	The Barnet Employment Land Review considers this to be a vulnerable site.	None	Outside of but well-related to the town centre – potentially suitable for main town centre uses.
Former Homebase Car Park, Colindale	1.12	This is a large area of empty concrete hard-standing, which used to be a Homebase car park. There was also an old telecoms exchange fronting the main road.	None	Out-of-centre and therefore not a preferred location for retail or leisure uses.
Barnet House, Whetstone		Current LBB offices and car park.	Office to residential conversion prior approval achieved for conversion of the offices into 254 flats	Whilst in-centre it is proposed to be occupied for residential purposes. Therefore, no floorspace likely to be achieved for main town centre uses.

Summary

- 9.5 While capacity for additional retail space is limited in the short term, there is evidence that quantitative capacity for additional commercial leisure floorspace, as well as qualitative evidence of under provision in a number of the centres assessed.
- 9.6 The above analysis suggests that while there are a number of sites which could accommodate additional small-scale retail and leisure development, the scope for substantial development is limited with the exception of a number of key sites, namely:
- Forumside sites, Edgware
 - A1 Self Storage, Whetstone

10 RECOMMENDATIONS AND CONCLUSIONS

Introduction

- 10.1 In making recommendations, the study has drawn on the evidence collected in Sections 2-9. This includes a review of the hierarchy of centres, an assessment of key trends, a review of the planning policy position, an assessment of shopping patterns and an assessment of quantitative and qualitative need.

Key recommendations

Need

- 10.2 In calculating retail needs, this study has considered both a constant market and increased market share scenario; the latter reflects the role the substantial commitment at Brent Cross will have on shopping patterns. While the commitment at Brent Cross has been expected to come forward for some years, it is reasonable to expect it will be realised in the medium term. On this basis, we consider the increased market scenario to be the most robust basis upon which to plan.
- 10.3 Under this scenario, capacity only begins to emerge after 2021. We recommend that the outputs to 2026 should be used as a guide and that capacity identified thereafter treated as indicative. Our health checks of the centre have not identified any substantial deficiencies in the existing network of centres. To ensure this remains the case, LBB should seek to ensure that retail development is focused to existing centres to enable the consolidation of space that is not fit for purpose rather than allocating additional sites.
- 10.4 In convenience terms, there is no quantitative requirement for LBB to plan for any new floorspace over the plan period (to 2036). This is because any additional expenditure growth is as a result of population growth and, while this does generate an increase in available convenience spending across the study period, this is more than absorbed by the convenience commitments. However, it is recognised that as there is substantial housing growth planned, including the creation of new neighbourhoods and in those instances, planning for some small-scale convenience provision may be warranted. However, LBB should seek to ensure that these uses are concentrated rather than scattered across developments. This will improve prospects for commercial space being let to operators. The risk of approving ancillary commercial space as part of larger developments is that the specifications can be unsuitable for operators, either in terms of configuration and/or location and can result in vacant units.

Town centres strategy

- 10.5 Periphery or under-performing areas in the centres can either be released from retail use, or redeveloped to ensure that the core of the town centres perform better, improving their overall performance. LBB should consider such applications on their merits and provided there will not be a significantly adverse impact on the health of

the centres through loss of viable existing uses, such applications should be supported, particularly where redevelopment may increase footfall in town centres through new residents or workers. While it is recommended that LBB should support such applications, in doing this they should also have regard to the fabric of the town centres and should therefore treat applications for development away from retail uses in any defined primary shopping area with some caution.

- 10.6 In relation to leisure uses, A3-5 uses are identified as accounting for the main proportion of leisure expenditure. The study has highlighted that all of the major and district centres would benefit from improvement to the leisure offer; LBB should therefore treat any applications received positively.
- 10.7 Gambling, betting and payday loan shops are a common feature of town centres and a number of centres in the borough include these uses. While we have not considered these in detail as part of this commission because they do not raise any explicit concerns against the PPG health check indicators, it is acknowledged that such uses can have negative health implications for those using these services. LBB could consider imposing Article 4 directions to control their presence in the borough; however, this would need to be underpinned by separate evidence.
- 10.8 Finally, we note that in a number of the borough's centres, there are active town teams which are promoting the role of those centres. In light of the shift in retail trends towards digital retailing, it is recommended that LBB should seek to promote the digital technologies in order to futureproof town centres from increasing competition by continuing to drive footfall and offer a seamless shopping and leisure experience.

Local impact floorspace threshold

- 10.9 Finally, LBB currently have a 500 sqm local impact threshold in place through the supporting text in its Development Management DPD. On the basis that this threshold applies to all orders of allocated centres in the borough which include a number of smaller local centres, PBA agree that this threshold should be retained but it is recommended that it should be enshrined in a specific policy rather than in supporting text.

General conclusions

- The average of all LBB district centres in comparison to the UK national average reveals that the general pattern is for a higher level of convenience (16.7% compared to 9.4%) and service provision (54.1% compared to 38.2%). This is consistent with – though higher than - national trends which have seen gradual increases in both convenience retail and service provision.
- Comparison retail provision on average in the borough is lower than the UK average (23.6% compared to UK average of 39.1%).
- The average level of vacancies in LBB's district centres (6.8%) is approximately half the current UK national average (12.1%).

- The largest district centres (Chipping Barnet, Cricklewood, Burnt Oak, Finchley Church End, North Finchley and Golders Green) are at the upper end of the scale of the London Plan's identified criteria for a district centre, and service a wider catchment, including in a number of cases from neighbouring boroughs.
- A common thread amongst all district centres in the borough is the level of convenience retail provision being well above the UK average and the level of comparison retail being well below the UK average, reflecting the national trends and the configuration of units within these centres.

10.10 In relation to commercial leisure uses:

- Food and drink uses (A3-A5) uses account for a significant amount (approximately 77%) of total leisure spending growth in LBB. The quantitative food & drink assessment indicates that there is sufficient expenditure capacity in LBB to support an additional 4,120 sq.m Class A3-A5 floorspace up to 2021.
- The survey results suggest that the introduction of night tube and ride sharing services has not had a significant impact on evening leisure spending patterns in LBB.
- Spending on recreational and sporting services accounts for 12% of total leisure spending growth in LBB.
- Spending on cinemas and theatres accounts for 5% of total leisure spending growth in LBB. LBB is currently served by three cinemas and the experiences a high level of expenditure leakage (57%). The cinema screen capacity assessment suggests there is capacity to support an additional 10 screens up to 2021 in LBB, equivalent to a large multiplex cinema or up to five boutique cinemas. Existing cinema provision is focused in the east of the borough, additional provision should be encouraged in the west of the borough to improve current retention rates.

Centre-specific conclusions

Hierarchy of centres

- 10.11 In relation to the adopted town centre hierarchy, we recommend that LBB should closely monitor the performance of Brent Cross which is expected to attain metropolitan centre status in the future.
- 10.12 Understanding Brent Cross's evolving role will be an important consideration for the town centre hierarchy of the borough, not least because while it is likely to increase Brent Cross's attraction, there are risks to nearby centres including Brent Street, Cricklewood and Hendon Central which will need to be closely monitored.
- 10.13 The health checks suggest that LBB should consider planning for a reduced role for Colindale – The Hyde as a current district centre which is performing a role more closely aligned with that of a local centre.
- 10.14 Conversely, there is extensive work underway to plan for growth at North Finchley. Our our health checks show that the centre is performing reasonably well both in quantitative and qualitative terms, however there scope for further improvement. On

this basis, it may be appropriate to plan for North Finchley to achieve major centre status and as such, LBB should consider identifying the centre as a key location for accommodating any emerging capacity over the plan period, both in retail and leisure terms.

Brent Cross

- 10.15 Brent Cross is the foremost comparison shopping destination in north west London. The survey results have confirmed its extensive catchment area which has remained relatively unchanged despite improvements in the retail and service offer at Westfield London as the key competitor to Brent Cross.
- 10.16 While not currently a town centre, it is anticipated that during the period of the next plan, Brent Cross will attain metropolitan centre status. As part of this change, there will be substantial expansion which will absorb much of the identified need in the period to 2026. Indeed, the Brent Cross Cricklewood regeneration scheme accounts for nearly 80% of committed comparison space and over 60% of committed convenience space in the Borough.
- 10.17 Growth at Brent Cross, while absorbing quantitative capacity, should not be seen to preclude enhancement of other centres. We discuss this further below but particularly given the long lead-in times associated with delivering not just the enhancement of the main shopping centre (Brent Cross North) but also the scheme at Brent Cross South now being taken forward by Argent, it will be important for LBB to support improvements of nearby centres to ensure that they are best placed to compete with these new developments as they come on line and cater to the needs of new business and residents in the area.
- 10.18 If the development at Brent Cross does not come forward, the increased market share capacity figures outlined in Section 6 of the report become irrelevant being premised on a significant expansion to Brent Cross's existing function and attraction.

Edgware

- 10.19 Our health check identified that the centre is vital and viable. It has good representation from national multiples, including Marks and Spencer, which attract shoppers to the centre from the north western part of the borough. While the centre's comparison turnover is lower than North Finchley's despite that centre being smaller in overall terms, its location means that it primarily serves a different catchment, and their roles should be seen as spatially complementary.
- 10.20 There are a number of opportunities within the centre which if brought forward would assist in bolstering the role and function of Edgware, particularly if these developments were to enhance the centre's leisure and night-time economy, or provide larger-floorplate retail units which the centre is currently lacking. Notably, permission has now been granted on part of the Forumside, adjacent to Broadwalk Shopping Centre for mixed-use development to include a hotel.

10.21 There is a need for environmental improvements to improve circulation within the centre, to encourage shoppers out of the Broadwalk Shopping Centre into the rest of Edgware.

District centres

10.22 Our analysis shows that **Chipping Barnet, Cricklewood, East Finchley, Golders Green, Mill Hill, North Finchley, Temple Fortune and Whetstone are vital and viable**. Specifically:

- **Chipping Barnet:** the centre is healthy and is fulfilling its role as a district centre in the hierarchy. The Spires Shopping Centre, which is in the process of being redeveloped/enhanced anchors Chipping Barnet, including a range of convenience (Waitrose) and comparison multiples, including fashion. In overall terms, the centre is attractive and accessible. The only concern noted was that vacancies have risen in the centre and therefore opportunities for reuse should be supported, including potentially considering alternative uses beyond retail or temporary meanwhile/pop up uses.
- **Cricklewood:** is one of the smaller district centres in the borough, but within it there is significant convenience floorspace, catering particularly to specialist/kosher needs. Like many of the borough's centre, its location on the main road means that the environment is very traffic dominated but there has been investment in the centre to improve the shop fronts and general streetscape. Opportunities to encourage non-town centre uses beyond the defined boundaries of the centre should be taken: the linear nature of the centre means that it sprawls along the main road; allowing changes of use away from retail and other town centre uses outside the defined frontages would assist on focusing the centre. While there is appears to be little in the way of crossover, the centre's health should be closely monitored as development progresses at Brent Cross
- **East Finchley:** the centre is performing well. The physical environment is high quality, characterised by good quality buildings and smaller units, and there are few vacancies, and while the convenience and comparison offer is could be improved, it is fulfilling its function as a district centre. The presence of a cinema in the centre is a significant strength and bolsters the town centre's leisure offer. While currently well-occupied, LBB may consider adopting a more flexible approach to the northern part of the centre which is some distance from the tube station to allow non-retail uses.
- **Golders Green:** the centre is highly accessible and has a notable level of convenience offer, including both multiples (Sainsbury's and Tesco) and independent stores (kosher/ethnic). It fulfils a predominantly day-to-day role, including meeting service needs, including cafes and local restaurants, and as such, has little comparison offer because of its proximity to Brent Cross. There is scope to improve the quality of the existing offer through small reconfiguration and redevelopment opportunities. The development at Brent Cross, has the potential to have some impact on the centre; however, because the role and function of Brent Cross is long established, we do not consider that the current position of the

centre's existing offer being largely complementary to Brent Cross will change. This complementarity should serve to insulate it from the more significant impacts from Brent Cross; however, investment in the centre should be encouraged to ensure that this remains the case. While there are few obvious larger scale opportunities, not least because vacancies are low, opportunities to reduce the prominence of traffic and improve usable public realm at the junction of Golders Green Road and Finchley Road should be supported.

- **Mill Hill:** the centre is performing well against the main indicators. While the convenience turnover of the centre is limited, pointing to underperformance in the in-centre Marks and Spencer; this is likely to be as a consequence of the proximity to Edgware and the larger, competing foodstores located there. Similarly, while there are a number of national multiples, including food and drink operators, the function of the centre remains that of a district centre with good public transport connections. There is evidence of recent investment and the household survey results indicate that while its attraction is largely confined to its home zone, it plays an important role in meeting local comparison shopping needs. The centre does have several long-standing vacancies, including as a consequence of bank closures. The proximity of the centre to the Saracens rugby stadium mean that there are some opportunities to capture the benefits on major inflows to the centre in terms of leisure provision; however, this would need to be balanced against the fact this is an occasional use and, if suitable sites became available in what is a constrained centre, any development should not compromise the role of Mill Hill as a district centre meeting local needs.
- **North Finchley:** is the main centre in the eastern part of the borough and it is recommended that it should be promoted to a major centre within the hierarchy. The household survey has shown the centre is a significant attractor of retail and leisure spending, with its comparison floorspace and turnover exceeding that of Edgware, and the presence of two foodstores within the centre generating significant convenience spending in the centre. The centre's food and drink offer is well established. However there has been limited recent investment in the centre, and there is potential for further improvement. The North Finchley Town Centre Framework SPD is currently being prepared and will provide further detail on how a number of the opportunity sites within the centre could be delivered to consolidate the centre's offer. This could include allowing the release of more peripheral sites for alternative uses, including residential, in order to focus offer and footfall as much as possible in what is a linear town centre.
- **Temple Fortune:** the centre has a diverse offer, including convenience anchor stores (Waitrose and M&S), reasonable comparison retailer representation and strong service offer. Vacancies are well below average. While the centre is located on a busy road, it has a parade-type arrangement and the environment is improved by crossings and wide pavements. There are few development opportunities beyond continued upgrading of existing space which should be supported to ensure the centre continues to function as a district in the hierarchy.
- **Whetstone:** the town centre is anchored by the in-centre Waitrose and while there have been reductions to the comparison offer through the redevelopment of

the Homebase, the centre's strengths remain its convenience and service offer. It has a pleasant environment, with good quality buildings and a tree-lined high street. However, its health should be closely monitored as the effect of office to residential development, including the loss of LBB as a significant employment in Whetstone, is likely to have change the profile of expenditure in the centre.

10.23 We identified that **Burnt Oak, Finchley Church End, Hendon Central and New Barnet all have potential to improve their performance.**

- **Burnt Oak:** the centre's comparison influence remains relatively local. While the centre has few vacancies and when visited appeared busy and well-used, there are significant qualitative deficiencies in its retail and service offer, which is dominated by low-value and unhealthy occupiers. By virtue of its location and the dominance of the Edgware Road, much of the centre's environment is challenging. While Watling Avenue has more scope for improvement, the present arrangement of many shops which extend their offer onto the pavement serve to reduce the overall perception of the centre. Opportunities should be taken to improve the centre's appearance; this could include shopfront upgrades and discouraging A5 uses which often present inactive daytime frontages.
- **Finchley Church End:** the centre's offer is focused on convenience, including an anchor Tesco store, and service uses. At present, the centre is performing adequately but could be improved. Therefore the performance of the centre should be carefully monitored: the centre has a number of office users within it which will have supported the convenience and service function of the centre but it is understood that some are subject to prior approval for conversion to residential. This may result in a different profile of shopper in the future as available daytime spending may reduce but conversely opportunities for enhancement to the night-time economy may arise.
- **Hendon Central:** although there is no clear anchor store, the centre includes a number of small-format foodstores; in comparison terms, there is little or no multiple offer which is likely to be as a consequence of its proximity to Brent Cross. Because of the scale of programmed investment at Brent Cross, it is not reasonable to expect the centre's comparison role to significantly improve over the plan period. However, it is clear that the centre fulfils an important role in meeting day-to-day needs of both residents and daily visitors. There has been investment to try to improve physical environment at the heavily trafficked Watford Way/Vivian Way junction, as well as frontage improvements. Furthermore, it is highly accessible and, as with Brent Street, the presence of Middlesex University in the area ensure that there is critical mass of available spending in the area.
- **New Barnet:** the presence of Sainsbury's as a large store in the town centre means it performs a strong convenience role and while this has not been bolstered as anticipated by the redevelopment of the former gas works site, opportunity will be created through the additional residential population and some additional town centre floorspace. By contrast, the comparison offer is limited and this means that the centre's role is in meeting lower order needs. The disjointed layout of the town centre as a result of the railway line means that while footfall to

the Sainsbury's is high, the ability for spin off benefits to the rest of the centre are more limited. However, the centre is expected to fulfil a district centre role.

10.24 We identified **Brent Street and Colindale – The Hyde** as **underperforming** against the key health check indicators for the following reasons:

- **Brent Street:** while the centre is currently underperforming, including poor comparison provision, high number of takeaways, relatively high vacancy levels and poor quality streetscape, we see that there are sufficient opportunities, most notably the location of the university campus to the west of the centre, which could allow the centre's performance could be improved over the plan period. In Brent Street's case, policy support and investment will be particularly important as the impacts of the enhanced role of Brent Cross become felt. While we consider there is little overlap in function between the two locations, the proximity of Brent Cross and the large-scale residential and office development expected should be an opportunity for Brent Street to improve its role by capturing pass-by trade and local shopping.
- **Colindale – The Hyde:** the centre's service offer includes a large number of takeaways but is deficient in other respects such a few financial services. Similarly, although there is strong international convenience offer, the comparison retail offer is very poor and subject to out-of-centre competition from the retail park. The centre, while on a number of bus routes, does not have a tube station so is relative less accessible than other nearby centres. Additionally, the centre's environmental condition is poor and its location on the main road mean that opportunities for enhancement are constrained. At present, the centre is not performing a district centre role and it is recommended that in discussion with LB Brent, within which the western part of the centre is located, the centre is downgraded to a local centre.

Local and neighbourhood centres

10.25 Turning to the local and neighbourhood centres, we concluded that the vast majority (13) were either performing well or tolerably against the key indicators given their position in the hierarchy. Only two centres were identified as underperforming.

10.26 East Barnet Village, Friern Barnet Village, Great North Road, Holders Hill Circus, Market Place and Colney Hatch Lane are vital and viable local/neighbourhood centres. We concluded that Apex Corner, Childs Hill Heath, Deansbrook Road, Golders Green Road, Hale Lane, Hampden Square, New Southgate were performing their role adequately. In the case of all these centres, small-scale improvements, including public realm and streetscape to reduce the dominance of traffic, to the centres should be supported, particularly in those identified as performing adequately.

10.27 Grahame Park and West Hendon are currently underperforming. In the case of Grahame Park, this is currently undergoing redevelopment and there is a longer-term programme of estate renewal in place which is likely to improve the centre during the plan period. West Hendon suffers from poor quality offer and high vacancies; while it is recommended that the centre should remain designated, there may be

opportunities through the planning application process to shrink the frontages of what is a linear local centre on a busy road.