



North Finchley Town Centre SPD Draft Baseline Report

JULY 2017

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Appendices

APPENDIX A: Relevant Policy Requirements – Non exhaustive list

Produced by



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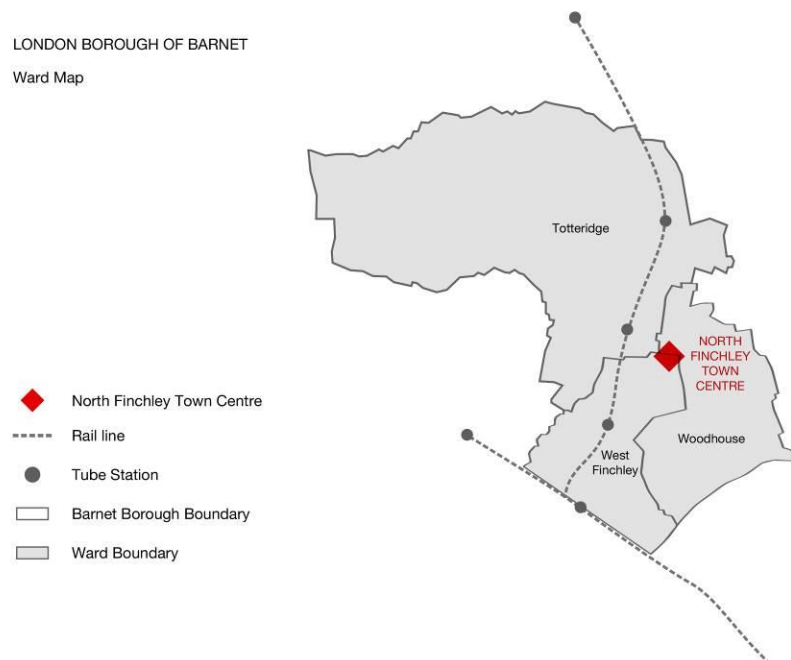
1 INTRODUCTION

- 1.1 GL Hearn part of Capita Real Estate Advisory together with BDP and Urban Flow, has been appointed by LB Barnet and RE to prepare the North Finchley Town Centre Development Framework Supplementary Planning Document (SPD).
- 1.2 The SPD has been commissioned to support and guide appropriate development, change, investment and improvements in the future of the town centre over the next 10 to 15 years. The key drivers and objectives are to:
- achieve sustainable social, environmental and economic development that will benefit North Finchley town centre and the surrounding area;
 - provide a framework for developing a mixture of land uses, including residential, retail, leisure, employment and community facilities in the town centre and wider area;
 - provide a framework for making decisions on future proposals in a manner that supports appropriate development, the overall improvement of the area and a vibrant town centre;
 - create a plan that maximises existing and future movement opportunities including links to nearby stations (Woodside Park and West Finchley), the bus network and pedestrian and cycle connections; and
 - achieve sustainable and well designed, safe, high quality streets, spaces, public realm and buildings, which deliver an appropriate degree of local distinctiveness.
- 1.3 Together with site visits to North Finchley the following studies and interventions constitute the starting point from which we have developed this Baseline Report:
- Entrepreneurial Barnet 2015 – 2020
 - Barnet Council Town Centre Offer
 - North Finchley Town Team
 - North Finchley Town Centre Planning Strategy - Issues and Options Report 2009
 - High Street Revivals North Finchley (2016, Joseph Partners)
 - Mayor's Outer London Fund support
- 1.4 This report includes a policy, property, transport, and design analysis, together with a wider performance review, to draw together a summary analysis of the key strengths and weaknesses of the centre. The report summarises the findings of our analysis, setting out a baseline position upon which the North Finchley Town Centre SPD will be developed.

The study area

- 1.5 North Finchley is located in the east of the London Borough of Barnet. It is the third largest town centre in terms of commercial floorspace across the Borough. As shown by Figure 1, the boundaries of two wards, namely West Finchley and Woodhouse, cross the study area.

Figure 1: Ward Map



Source: BDP.

- 1.6 The centre itself is focused along the high Road (A1000) and is essentially linear in form. It stretches from the island encompassing the Arts Depot and Tally Ho at the south to Sainsbury's and beyond in the north, encompassing a considerable number of retail parades hosting many independent and a number of national high street shops as well as a variety of independent restaurants.
- 1.7 High Streets have generally grown too long, usually based on an over-optimistic view by developers and self-interested tenants over many years. Their physical extents have drifted from their historic fundamental areas of focus into unwieldy and very weak retail pitches on the fringes – diluting impact and attractiveness.

- 1.8 British Property Federation published the Town Centre Investment Zones Report¹ on behalf of the Fragmented Ownership Group in early 2016. The report advocates a proactive approach to the re-structuring of town centres. In particular there is an emphasis on better management of the core centre to increase its vibrancy and potential introduction of non-retail uses to balance an oversupply of under used retail premises.
- 1.9 The centre is bounded by residential areas, green spaces and a range of schools, the current context of the study area is one of an Outer London town centre based around a “traditional” high street.
- 1.10 As shown by Figure 2 the area is served by two underground stations on the Northern Line, both within travel zone 4. Woodside Park station is within 10 minutes’ walk and the West Finchley station is within 15 minutes’ walk. The overall public transport accessibility level (PTAL) averages 3 (Good).

Figure 2: The wider area

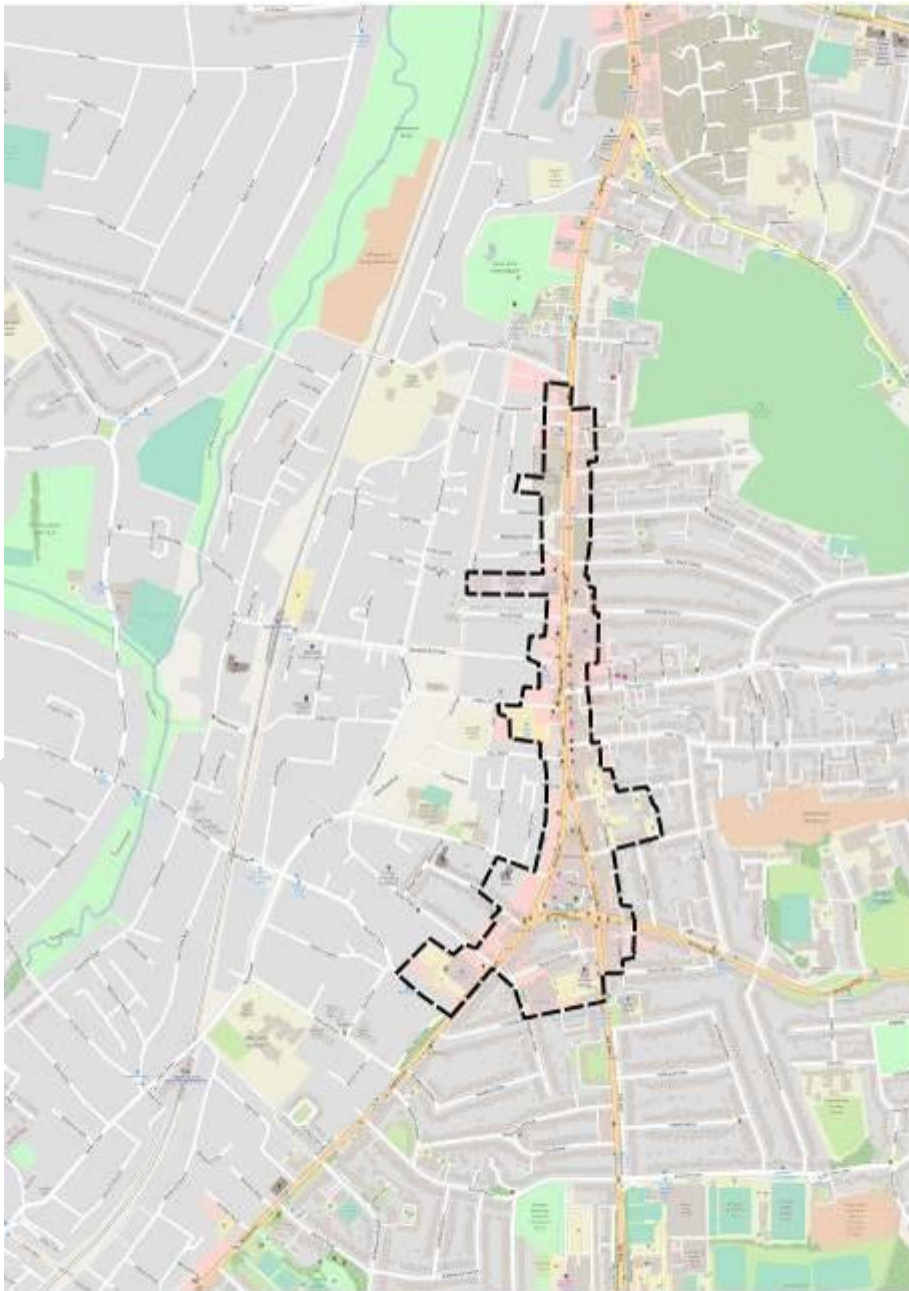


¹ Report available at: <http://www.bpf.org.uk/sites/default/files/resources/TCIM-summary-paper.pdf>

Source: BDP.

The SPD's working study area (**Figure 3**) extends beyond the designated town centre boundary to include a number of relevant town centre uses and functions, such as retail and office locations, as well as car parks which service the town centre. In this way the SPD boundary looks to provide a comprehensive framework for future development and improvement of the town centre.

Figure 3: North Finchley Town Centre SPD, the Study Area



Structure of the report

1.11 The remainder of this report has been structured as below:

- [Chapter 2](#): Relevant Policies
- [Chapter 3](#): Urban Analysis
- [Chapter 4](#): Current Performance
- [Chapter 5](#): Transport Analysis
- [Chapter 6](#): Property Review
- [Chapter 7](#): Bringing all together

2 PLANNING POLICY AND REGENERATION

- 2.1 The Supplementary Planning Document (SPD) is a non-statutory document and therefore should be considered within the overarching Planning Policy Framework for North Finchley town centre.
- 2.2 The framework comprises the adopted development plan (London Plan, Barnet Core Strategy, Development Management Policies) together with the National Planning Policy Framework (NPPF) and Guidance (PPG) and other material considerations such as Mayoral and Borough SPD/SPG's.
- 2.3 Relevant development plan documents include:
- London Plan 2016;
 - Barnet Core Strategy 2012 (September);
 - Barnet Development Management Policies 2012 (September);
 - Emerging North London Waste Plan;
 - Barnet Local Development Scheme 2016; and
 - Barnet Community Infrastructure Levy 2013.
- 2.4 Additional material considerations include:
- National Planning Policy Framework (NPPF);
 - National Planning Practice Guidance (NPPG);
 - London Town Centre SPG 2014;
 - Barnet Statement of Community Involvement 2015;
 - Planning Obligations SPD 2013;
 - Sustainable Design and Construction SPD 2016;
 - Affordable Housing SPD 2007;
 - Residential Design Guidance SPD 2016;
 - Authorities Monitoring Reports; and
 - Delivering, Skills Employment, Enterprise and Training (SEET) from development through S106 2014.
- 2.5 Before analysing the relevant policies we have provided below a short description of the policy position of Supplementary Planning Documents (SPDs); their non-statutory nature and the relevant legislative framework.

Supplementary Planning Documents

- 2.6 The NPPG² clearly states that SPDs should be prepared in line to the NPPF and particularly paragraph 153 which states:

"Each local planning authority should produce a Local Plan for its area. This can be reviewed in whole or in part to respond flexibly to changing circumstances. Any additional development plan

² Reference ID: 12-028-20140306

documents should only be used where clearly justified. Supplementary planning documents should be used where they can help applicants make successful applications or aid infrastructure delivery, and should not be used to add unnecessarily to the financial burdens on development”

- 2.7 The NPPF states that the SPD should provide... *“more detailed advice or guidance on the policies in the Local Plan”*and not introduce new policies.
- 2.8 The requirements for producing SPDs are set out in regulations 11 to 16 of the Town and Country Planning (Local Planning) (England) Regulations 2012. In some circumstances a Strategic Environmental assessment may be required when producing a SPD.
- 2.9 SPDs cover a wide range of issues and can be used to expand policies contained within policy documents. They have to be consistent with national planning policy; be consulted on publicly; and be in conformity with policies contained within the Local Plan.
- 2.10 The process for preparing an SPD is similar to a Local Plan document. However, they are not subject to independent examination but are open to judicial review following adoption. There are four main stages in their production:
- Preparation and informal consultation
 - Public participation (Reg 12): Consultation (being not less than 4 weeks))
 - Representations on Supplementary Planning Documents (Reg 13), consideration of representations and completion of final draft of the Supplementary Planning Documents
 - Application and interpretation of Part 5 (Reg 11) and Adoption of Supplementary Planning Document (Reg 14): Adoption of the Supplementary Planning Documents
- 2.11 In case of withdrawal, Regulation 15: “Revocation or withdrawal of a supplementary planning document” lists all the relative regulatory actions. Finally, Regulation 16 “Direction in respect of a supplementary planning document” states all the regulatory requirements that the planning authority must follow based on the Secretary of State decision.
- 2.12 This planning tool allows Barnet Council to establish its vision for the future of North Finchley and to guide development opportunities in line with Barnet’s Local Plan as well as the London Plan and national policy. Key policies identified in these documents are set out below.

National Planning Policy and Practice Guidance

- 2.13 The NPPF (Para 160 and 161) states that:

160. Local planning authorities should have a clear understanding of business needs within the economic markets operating in and across their area. To achieve this, they should:

- *work together with county and neighbouring authorities and with Local Enterprise Partnerships to prepare and maintain a robust evidence base to understand both existing business needs and likely changes in the market*
- *work closely with the business community to understand their changing needs and identify and address barriers to investment, including a lack of housing, infrastructure or viability*

161. Local planning authorities should use this evidence base to assess:...

- *the role and function of town centres and the relationship between them, including any trends in the performance of centres*
- *the capacity of existing centres to accommodate new town centre development*

2.14 NPPF 173 deals with “Ensuring viability and deliverability” and states that” *Pursuing sustainable development requires careful attention to viability and costs in plan-making and decision-taking. Plans should be deliverable*”.

2.15 The Planning Practice Guidance encourages plan makers to plan positive and ensure the vitality and viability of the town centres. According to NPPG³ any town centre strategy should be based on the “*current state of town centres and opportunities*” in order to support their vitality and viability and their development needs.

2.16 The Guidance also highlights that:

“Not all successful town centre regeneration projects have been retail led or involved significant new development. Improvements to the public realm, transport (including parking) and accessibility as well as other measures promoted through partnership can also play important roles.

Any strategy should identify relevant sites, actions and timescales, and be articulated clearly in the Local Plan, where it can be considered by local people and investors. It should be regularly reviewed, assessing the changing role and function of different parts of the town centre over time.”

Development Plan

2.17 The adopted development plan for the North Finchley area includes:

- London Plan (2016),
- LB Barnet Local Plan (Core Strategy) (2012) and
- LB Barnet (development Management Policies) (2012).

2.18 National planning policies are set out in the National Planning Policy Framework (NPPF) (2012) as above. Other material consideration are set out in:

- GLA - Town Centres SPG (2014)
- LB Barnet Supplementary Planning Documents (SPDs):

³ 2b-003-20140306

- Planning Obligations SPD (2013)
- Sustainable Design and Construction SPD (2016)
- Affordable Housing SPD (2007)
- Residential Design Guidance (2016)
- Delivering, Skills Employment, Enterprise and Training (SEET) from development through S106

London Plan (2015)

- 2.19 Work is underway on a full review of the London Plan. The Mayor is compiling evidence on a range of policy areas including town centres, industry and office space prior to publication of a draft London Plan in November 2017.
- 2.20 The London Plan (2015) defines (Annex 2) North Finchley as a District centre.
- 2.21 London Plan Policy 2.15 *Town Centres* (March 2016) aims to ensure that the London's town centre network is designed in order to promote the competitiveness and vitality of each town centre as well as any change in the network should be a strategic planning outcome. The policy provides a strong supporting policy framework, noting (2.15 A (a)) that town centres should be "*...the main foci beyond the Central Activities Zone for commercial development and intensification, including residential development*".
- 2.22 At Policy 2.15 D(c), boroughs are encouraged to "*proactively manage the changing roles of centres, especially those with surplus retail and office floorspace, considering the scope for consolidating and strengthening them by encouraging a wider range of services; promoting diversification, particularly through high density, residential led, mixed use re-development; improving environmental quality; facilitating site assembly, including through the Compulsory Purchase process and revising the extent and/or flexibility for non-A1 retail uses in secondary shopping frontage policies*".
- 2.23 At paragraph A2.6 (Table A2.1) the London Plan provides strategic guidance on the broad future direction envisaged for individual town centres. North Finchley is classified as having "medium" growth potential which "*includes town centres with moderate levels of demand for retail, leisure or office floorspace and with physical and public transport capacity to accommodate it*".
- 2.24 A2.6 notes that "*...The potential future growth categorisations are only indicative and should be refined by boroughs in collaboration with the Mayor in light of integrated strategic and local capacity assessments and health checks as part of the preparation of LDFs. The categorisations refer to the broad potential for growth for the whole centre and not for individual sites within it. Further guidance on the application of policy will be given in Supplementary Planning Guidance*".

2.25 In addition, development proposals within town centres should conform with London Plan Policies:

- 4.1 Developing London's economy
- 4.2 Offices
- 4.3 Mixed Use development and offices
- 4.5 London's visitor infrastructure
- 4.6 Support for and enhance of arts, culture, sport and entertainment
- 4.7 Retail and town centre developments
- 4.8 Supporting a successful and diverse retail sector and related facilities and services
- 4.9 Small shops

2.26 A detailed list of all policies form the policy framework that any future development within the boundary of this SPD should conform to is included in Appendix 1.

Draft Mayor's Transport Strategy

2.27 The Draft Mayor's Transport Strategy published in June 2017 builds on the established sustainable transport agenda for London further strengthening commitments to sustainable transport mode transfer away from the private car. The 'Healthy Streets' initiative seeks to support the creation of appealing streets and street networks to encourage walking and cycling and public transport use, and minimise the health problems associated with car use.

2.28 Sustainable mode-based transport is seen as the means to unlock growth in a positive way to the benefit of everyone. Along with walking and cycling, in Outer London the vision is for public transport to provide for better travel over distances too long to walk or cycle and reduce the number of vehicles on London's streets. The stated transport principles of this Good Growth are stated as:

- Good access to public transport
- High-density, mixed-use developments
- People choose to walk and cycle
- Car-free and car-lite places
- Inclusive, accessible design
- Carbon-free travel
- Efficient freight

Local Plan

2.29 Barnet's Core Strategy and Development Management Policies DPD's were both adopted in September 2012, consistent with the NPPF (2012) principles of sustainable development.

2.30 Barnet's Local Plan is under review. The Local Plan has to shape the future of Barnet as a place, providing the overarching local policy framework for delivering sustainable development. A new single Local Plan document, supported by an updated evidence base, will look ahead to 2036 and

integrate strategic policies, development management policies and site proposals in alignment with the new Mayor's London Plan as well as consistent with national planning reforms.

2.31 The timetable for the Local Plan is :

- Stage A - Evidence Gathering (Summer 2016 onwards)
- Stage B - Local Plan Preferred Stage (Reg 18) (Consultation Summer 2018)
- Stage C - Local Plan Publication Stage (Reg 19) (Consultation Winter 2018/19)
- Stage D - Local Plan Submission Stage (Regs 20 to 22) (Consultation Summer 2019)
- Stage E - Local Plan Examination in Public – (Winter 2019/20)
- Stage F - Adopt Local Plan (Reg 36) – Autumn 2020

Core Strategy

2.32 The SPD is being prepared to supplement Brent's local Plan policy framework. Core Strategy Policy CS 1 sets out Barnet's "three strands approach", namely Protection, Enhancement and Consolidated Growth. It identifies North Finchley as a "*Priority Centre*" to be enhanced and where mixed use development will be promoted.

2.33 CS 2 addresses the distribution of growth to meet housing aspirations. It identifies that a town centre framework will be prepared for North Finchley where "*....the main focus for enhancement and infill housing development: and will provide for residential uses above ground floor level*"

2.34 Section 11.7 deals with town centre frameworks and at 11. 7. 4 that "*....Town centre frameworks aim to create the right environment for vibrant and viable town centres in Barnet*".

2.35 As identified in Core Strategy Policy 6 *Promoting Barnet's town centres* which aims to.

- *promote successful and vibrant centre to serve the needs of residents, workers and visitors and ensure that new development is of an appropriate scale and character for the centre in which it is located;*
- *promote the distribution of retail growth to meet the capacity for an additional 2,200m² (net) of convenience goods floorspace across Barnet by 2021–2026. The majority of the convenience capacity arises in the East sub-area (centred on the District Centre of North Finchley) beyond 2016.*
- *promote the distribution of retail growth to meet the capacity for an additional 16,800m² (net) of comparison goods floorspace across Barnet by 2021–2026. The majority of this capacity arises in the East, West and South West sub-areas. On basis of continued expenditure growth we will in addition support comparison goods provision in Edgware, North Finchley and Chipping Barnet;*
- *ensure that food, drink, entertainment uses as part of a healthy evening economy do not have a harmful effect on residents and the local area;*
- *ensure the efficient use of land and buildings in the centre, encouraging a mix of compatible uses including retail, managed affordable and flexible workspace, leisure and residential that add to the vibrancy of the area whilst respecting character;*

- *take a planned approach to manage development opportunities through the Site Allocations DPD promote development*
- *support retail uses in the town centre by improvements to the public realm, the public transport network, short-trip parking and accessibility by cyclists and pedestrians; and promote investment in the historic environment of town centres;*
- *protect existing markets as part of the retail offer of Burnt Oak, Chipping Barnet and North Finchley town centres and, where appropriate, use S106 contributions to ensure the provision of 'affordable shops' in new retail development.*

2.36 Policy CS8 deals with promoting a strong and prosperous Barnet and encourages "... new mixed use commercial floorspace in our priority town centres (inter alia)... North Finchley".

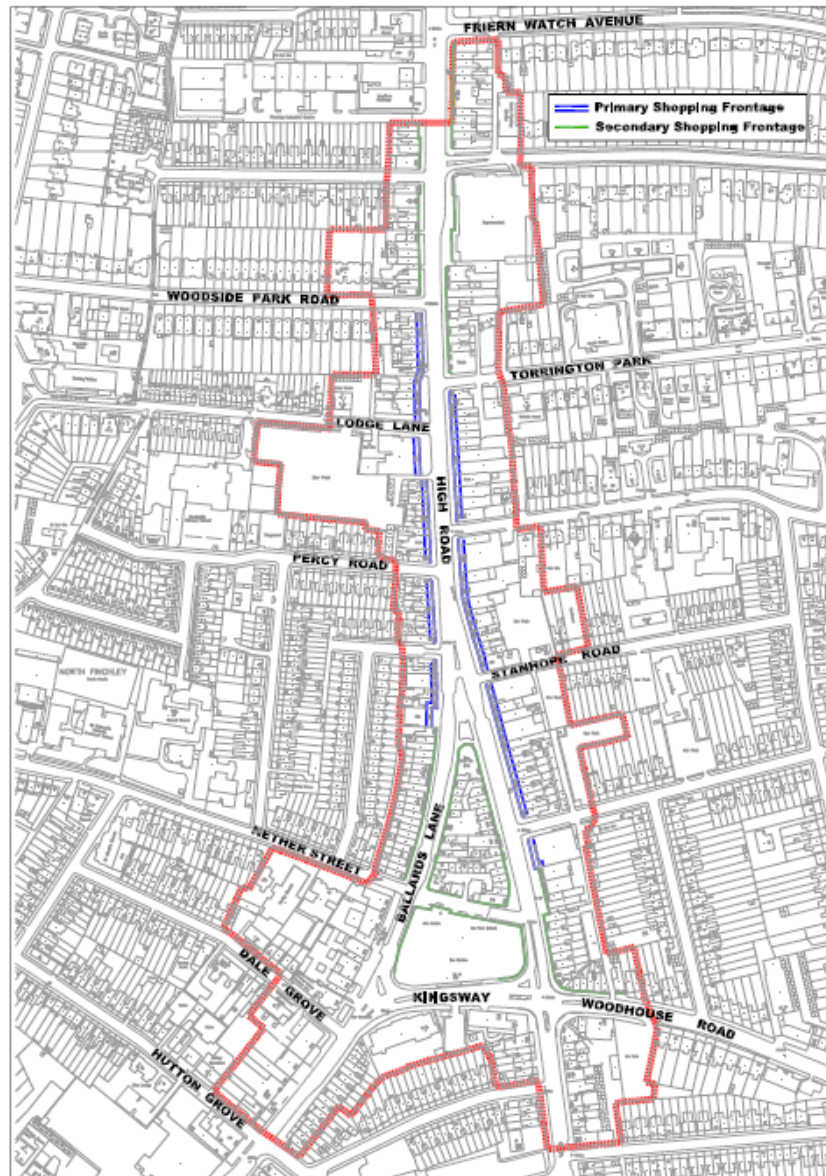
Development Management Policies DPD

2.37 Development Management Policy 11 *Development Principles for Barnet's Town Centres* encourages the mix of appropriate uses as part of development within the town centre to support its continued vitality and viability. The policy lists the specific requirements with regards to the Town centre uses; primary and secondary frontages; and mixed-use developments.

2.38 DM 11 (a) (i) deals with town centre uses and identifies that "...significant new retail and other appropriate town centre uses outside the town centres or any expansion of existing out of centre sites will be strongly resisted unless they can meet the sequential approach and tests set out in the NPPF or are identified in an adopted Area Action Plan. Edge of centre proposals will not normally be appropriate and therefore should demonstrate why they are not locating in a town centre site."

2.39 North Finchley's town centre boundary is set out at Map 9 (Development Management Policies (2012) Appendix 5) as illustrated in **Figure 4**.

Figure 4: North Finchley Town Centre Shopping Frontages



Source: Barnet Council, Development Management Policies (2012) Appendix 5: Town centre maps, Map 9

- 2.40 Policy DM 14 deals with employment space. DM 14(i) states that “Proposals which result in a redevelopment or change of use of a Locally Significant Industrial Site...will not be permitted”.
- 2.41 DM14 (ii) says that outside of the designated areas, loss of B class uses will not be permitted unless it can be demonstrated that the use is no longer viable or suitable.

- 2.42 Map 5 (Development Management Policies (2012) Appendix 7) identifies that Finchley Industrial Estate is designated as a locally significant industrial site.
- 2.43 Barnet's adopted Community Infrastructure Charging Levy 2013 establishes the rates payable for new residential and retail premises in the borough which will help to support local infrastructure. This rates are £135 per sqm for residential (C1-C4 Use Class, Sui Generis HMAs (excluding ancillary car parking), £135 per sqm for retail (A1-A5 Use Class (excluding again ancillary car parking) and 0£ for any other Use Class.
- 2.44 Appendix A provides a more detailed (although non-exhaustive) list of the policy requirements that each new development with North Finchley Town Centre should consider together with the guidance provided in this SPD.

Local Plan Evidence Base

Housing and employment

- 2.45 Barnet's target as set out in the London Plan (March 2016) is to deliver 2,349 net new homes per year. Barnet's Local Plan target reflects Barnet's previous London Plan target of 2,255 net new homes per year and aims to provide 28,000 additional homes by 2025/26 (1,867 pa).
- 2.46 According to Barnet *5 Year Housing Land Supply (5YHLS) and Future Housing Supply 2016*, the council can demonstrate a deliverable supply with a 5% surplus for the next 5 year. However against the London Targets the 5YHLS (with 20%) is estimated 4.9 years.
- 2.47 As part of the London Plan Review the GLA published in June 2017 the "London Industrial Land Demand Final Report". This report assesses land demands for various types of industry and the amount of industrial land that London needs to maintain to ensure it continues to function as a successful and sustainable city. However Industrial land in London is under particular pressure given the high demand for housing land and the much higher land values that residential development commands compared to industrial.
- 2.48 According to the report the new benchmark for Barnet for the period 2016-41 shows a positive demand of industrial land (7.3ha overall). In particular there is a potential release of 2.2ha of industrial land but additional need for 9.3ha of warehousing land across the whole period.

Town Centre Floorspace Needs Assessment

2.49 GVA prepared the Town Centre Floorspace Needs Assessment in 2009 and 2010 (Update) to support the development of Barnet's Core Strategy. The study identified a reasonably high level of leakage from evening economy to Central London and other competing town centres out of Barnet.

2.50 GVA's Household telephone survey . revealed that North Finchley has the third highest draw of comparison goods expenditure (after Brent Cross - 26.6% and Central London – 14.2%), attracting nearly £82m or 3.8% of the total available in the survey area. Regeneration Initiatives

2.51 This section summarises the regeneration initiatives occurred in North Finchley the last decade.

North Finchley Outer London Fund

2.52 The Outer London Fund (OLF) was launched by the Mayor in June 2011. It was a three-year initiative dedicated to strengthening the vibrancy and growth of London's high streets and town centres.

2.53 North Finchley Town Centre received £1.5million of OLF monies to improve the cultural offer and the public realm of the area. This has delivered a package of public realm improvements, events and promotional activities and business support including:

- Grand Arcade vacant units' activation initiatives, delivered by the North Finchley Town Team. This was set up voluntarily by locals to promote various activities to revive the town.
- Public realm improvements including new bins, tree planting and new signage in Tally HO triangle, Lodge Lane Car Park and the Library.
- Cultural emphasis with the installation of bespoke art pieces such as the mini library in Sainsbury's and the mini Gaumont cinema model outside the Arts Depot

2.54 Views on the impact of the Outer London Fund are being gathered through the stakeholder engagement process.



Mini Library, designed by Kim Meredew. Located at Sainsbury's and serves as a signpost to the library at the corner.



Mini Gaumont cinema model (Source: londonpostcodewalks.wordpress.com/2015/08/, last visited 20/07/17)

North Finchley Town Centre Team

- 2.55 A Town Team dedicated to improving North Finchley Town Centre was set up by local groups and individuals and launched in March 2013. The team is no longer operational. Their last activity was recorded in 2015.
- 2.56 The team was a voluntary initiative actively involved in the regeneration of the town centre, had a say in the future of North Finchley and seek external funds and identified local priorities. Sixteen board members representing local businesses, charities and the public sector comprise the Board. The Team aimed to “help make North Finchley Town Centre a place that people want to use, enjoy and return to, and where businesses can thrive in an attractive and distinctive environment”.
- 2.57 Since its establishment the team had been working on a number of initiatives including the spending priorities of the OLF spending.

North Finchley Town Centre Planning Strategy – Issues and Opportunities Consultation Draft 2009

- 2.58 London Borough of Barnet published in 2009 the North Finchley Town Centre Planning Strategy – Issues and Opportunities Consultation Draft. This set out a summary of the research, consultation and initial analysis undertaken at the time for North Finchley. Whilst not progressed beyond the options stage, this work provides a useful starting point for the current SPD and has been given consideration whilst recognising a number of key changes in the centre since that time, not least relating to Permitted Development, an increase in the residential stock and changing patterns in retail frontage. These matters are considered further in the proceeding chapters. Key issues from the 2009 report include:
- The lack of distinct centre and lack of public space
 - Variation in townscape quality
 - Vehicle dominated environment
 - Lack of larger units
 - Considering the function of the office space
 - Enhancing the role of the Arts Depot and evening economy more generally

Planning Policy and Regeneration Summary

- The Council’s adopted Core Strategy Policy 6 provides a strong overarching approach to the promotion of town centres supported by Development Management Policy 11.
- London Borough of Barnet’s adopted CIL enables monies to be captured for new residential and retail development towards local infrastructure needs.
- An update is currently underway (summer 2017) to determine the latest retail need for the centre as part of a borough wider review. An employment land review is also being progressed.

- A number of regeneration initiatives have been taken forward in recent years in North Finchley including a Town Team and spending through the Outer London Fund, which have led to some local environmental works.
- A 2009 planning strategy was taken to issues and opportunities stage which provides a useful benchmark for the 2017 baseline for the SPD.

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3 URBAN ANALYSIS

- 3.1 This section provides an overview of the key physical characteristics of the study area. It considers the character of the area, road structure, building heights and ground floor uses that together formulate the look and feel of the centre.

Area Character

- 3.2 The study area comprises the urban core of North Finchley, with the short section of the A1000 High Road acting as a town centre hub. The majority of the town centre along the High Road is characterised by well-maintained 3-storey Victorian and Edwardian parades. The historic fabric is to a large extent preserved and contributes to the local character and the sense of place. The urban core itself includes a number of buildings with historical architectural quality - the key buildings which contribute to the local character have been highlighted in the diagram below (Figure 6).
- 3.3 A network of Edwardian and Victorian terraced houses connect to the central core from the east and west. The Characterisation Study of the London Borough of Barnet (May, 2010) demonstrates that areas to the south, west and south-east of the study area are largely comprised of urban terraces, whilst the area to the east is made up of suburban terraces and suburban periphery residential use.
- 3.4 The study area can be divided into northern, central and southern zones, each with slightly differing overall character. The northern zone of the study area can be characterised by its distance from the southern core, in that it demonstrates a quieter area with modern residential and employment uses on the ground floor. This zone is distinguishable from the traditional local centre as the building heights are generally between five and seven storeys with a more contemporary building typology.
- 3.5 The architecture within the central zone can be characterised as that of the traditional local centre, comprising largely of small ground floor retail units, with terraced housing above. This zone also benefits from proximity to the tube station at Woodside Park, with this area being a type of town centre arrival zone. The buildings in this zone are generally 3 storeys in height, and are of mixed architectural quality. Some poorer quality buildings are in need of refurbishment or façade treatments.
- 3.6 The southern zone can be characterised as the core of the central area, with the triangle Tally Ho site as the focal point. The architectural character within this area is mixed, with buildings heights of up to 17 storeys at the Arts Depot and surrounding developments of 4 storeys and above. The zone also has numerous key retail anchors including Waitrose, Homebase, Aldi and Argos, with much larger building footprints than the traditional local centre retail units. The difference in building typologies results in lack of uniformity and local character in the southern zone.

3.7 The southern end of the centre includes a combination of more modern development as well as some influenced by a 1930s and modernist influence, including the Grand Arcade, a boutique arcade of shops running under the Tally Ho Triangle. The Tally Ho pub itself dates to 1927 when it replaced the 1860s Park Hotel. The pub is a Locally Listed building.

3.8 Key anchors in the area are Sainsbury's, located in the northern part of the High Street and Aldi and Waitrose at the southern end of the Town Centre. Other major retailers include Argos and Boots in the southern part of the Town Centre. Arrival into the Town Centre from South and South-east is dominated by the high rise Arts Depot development.

Shop Front Quality

3.9 The shop front quality along the High Road is mixed, with a large number of poor quality frontages. There is a lack of active frontages, with many shop windows covered internally with posters and signage. Vacant units also detract from the shop front quality along the High Road. A number of shops have outdoor displays which, due to the lack of pavement space, create a cluttered street environment and presents an issue for accessibility.

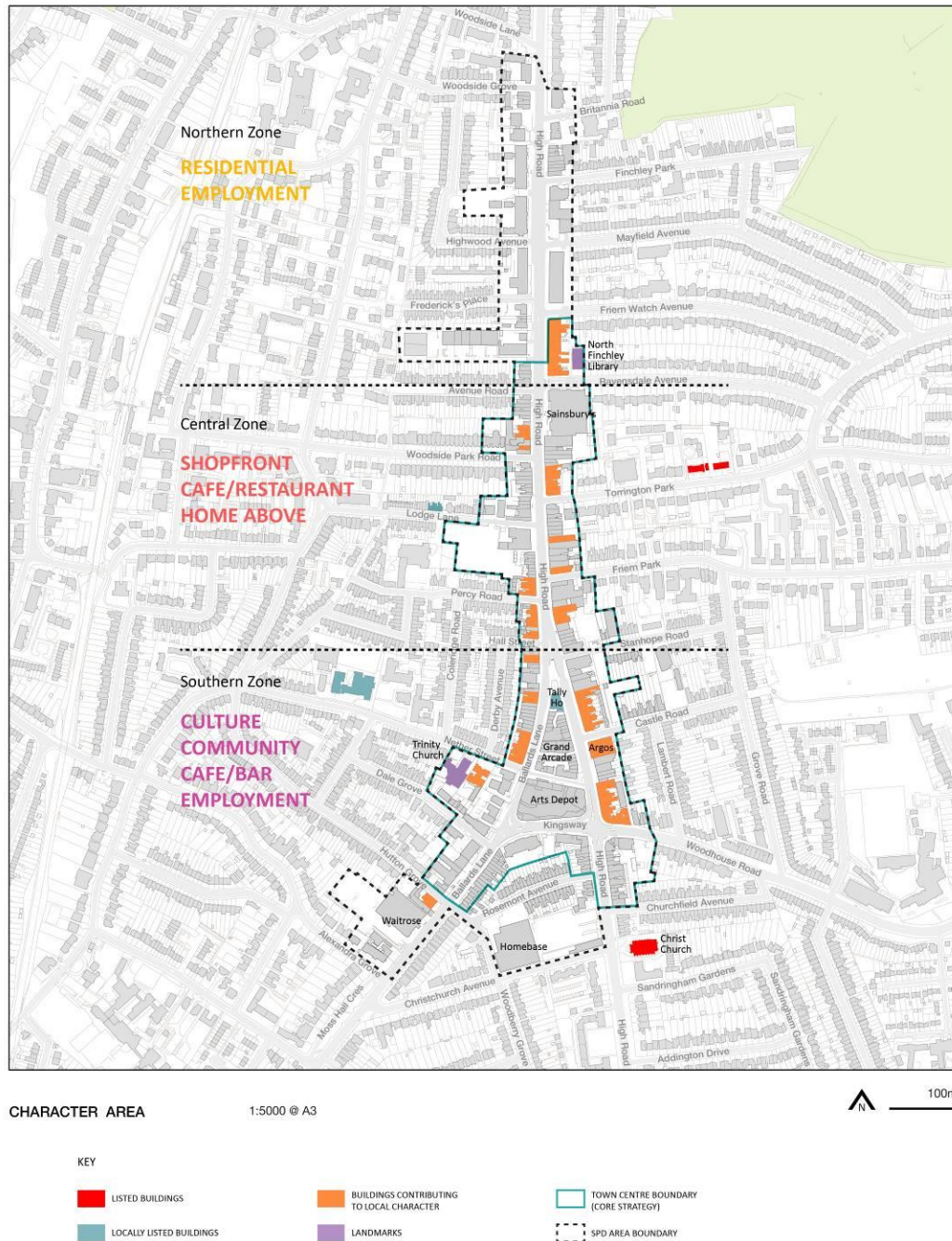
Public Realm

3.10 There is generally a lack of good quality public realm within the study area with few safe, pleasant spaces for people to gather. The main public space at the corner of the Tally Ho triangle site provides good tree cover and seating however, due to its location is surrounded by heavy traffic and is rarely used. Narrow pavements and on-street car parking impact negatively on the pedestrian environment. The existing street furniture and public art is not well paced, and creates an issue for those who are mobility impaired. The best example of outdoor seating is demonstrated outside Starbucks where a wider pavement enables a more pleasant pedestrian and outdoor café experience, otherwise there are limited opportunities for outdoor dining.

3.11 The Town Centre feels dominated by cars and despite of the low level of vacancy and some good quality buildings, the area is not perceived as a pedestrian friendly place where people tend to dwell.

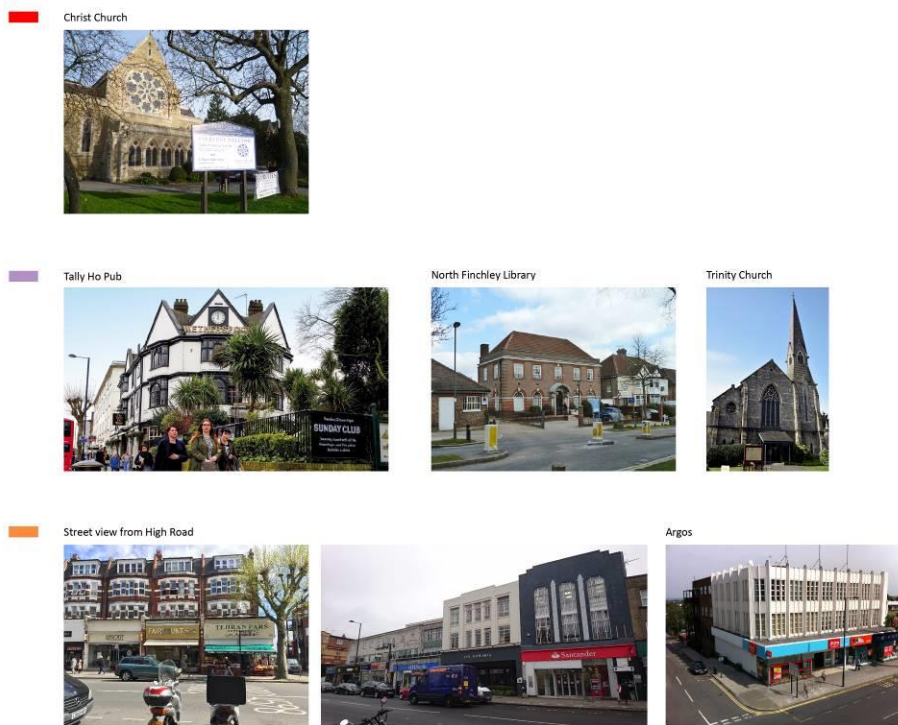
Figure 5: Area Character Map

NORTH FINCHLEY TOWN CENTRE
DEVELOPMENT FRAMEWORK SPD



Source: BDP.

Figure 6: Area Character



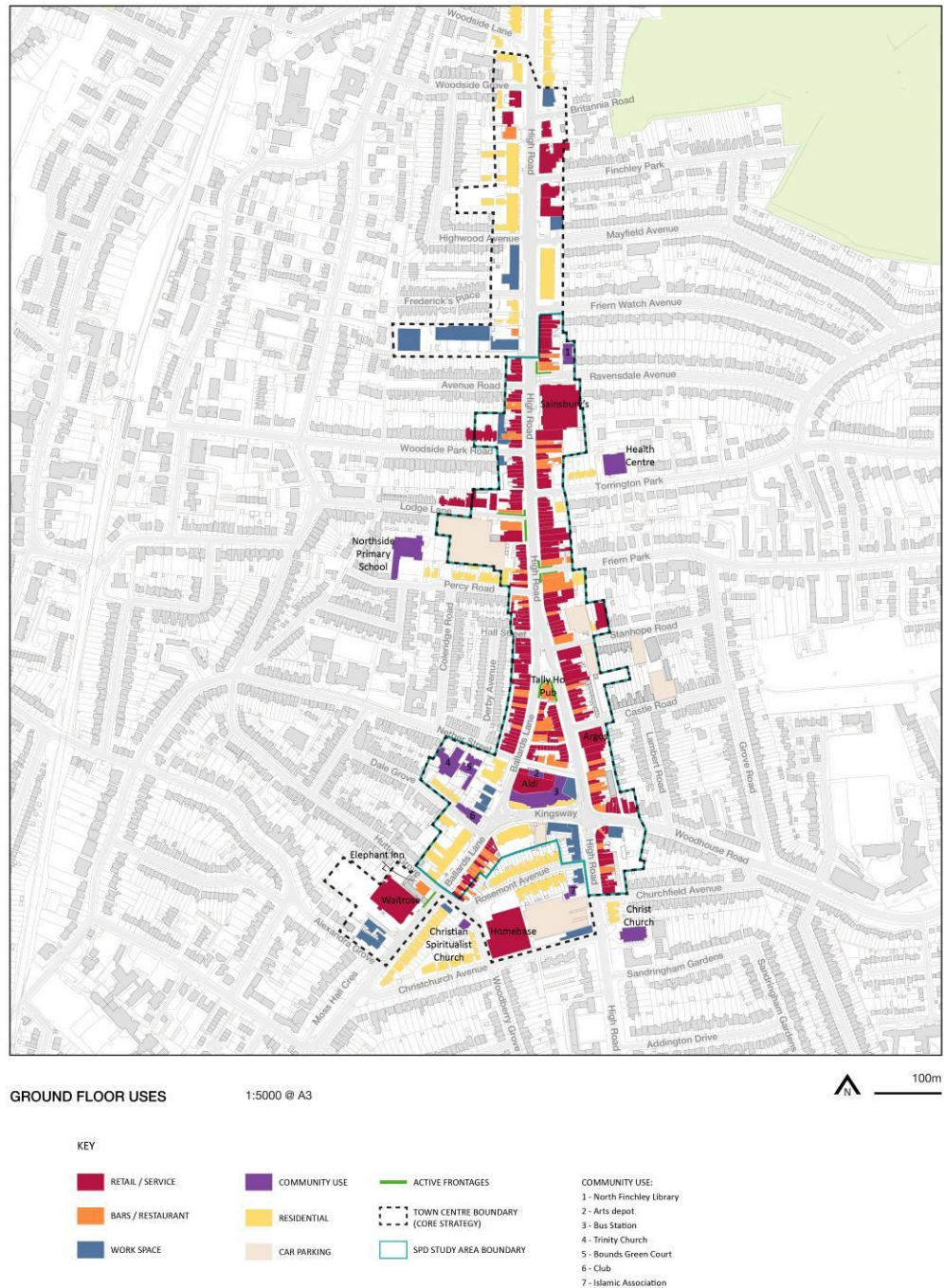
Source: BDP.

Ground Floor Use

- 3.12 The town centre has a good mix of ground floor uses, such as food stores, smaller retail, financial and community servicing, bars/restaurants, workspaces, and some community uses. The upper floors are predominantly occupied by residential units apart from the office blocks. Based on the council tax records for the Town Centre Boundary (designated boundary), there have been recorded around 180 residential units.
- 3.13 The ground floors of a number of new developments in the northern part of the study area are of residential use, representing a significant change in recent years which has begun to shorten the high street experience whilst increasing its footfall.
- 3.14 There are a cluster of bar / restaurants at the Tally Ho triangle and opposite the Bus Depot of the west side of the High Road which provide more of a focus for evening activities. In the central section of the town centre there are a number of coffee shops and cafes which relate to the primary frontage designation and retail offer which emphasises daytime activity.
- 3.15 Employment uses are clustered at the south end of the centre, west Ballards Lane and south Kingsway, which are primarily office, as well as the Finchley Industrial Estate to the north of the centre set behind the High Road.

Figure 7: Ground Floor Uses

NORTH FINCHLEY TOWN CENTRE
DEVELOPMENT FRAMEWORK SPD



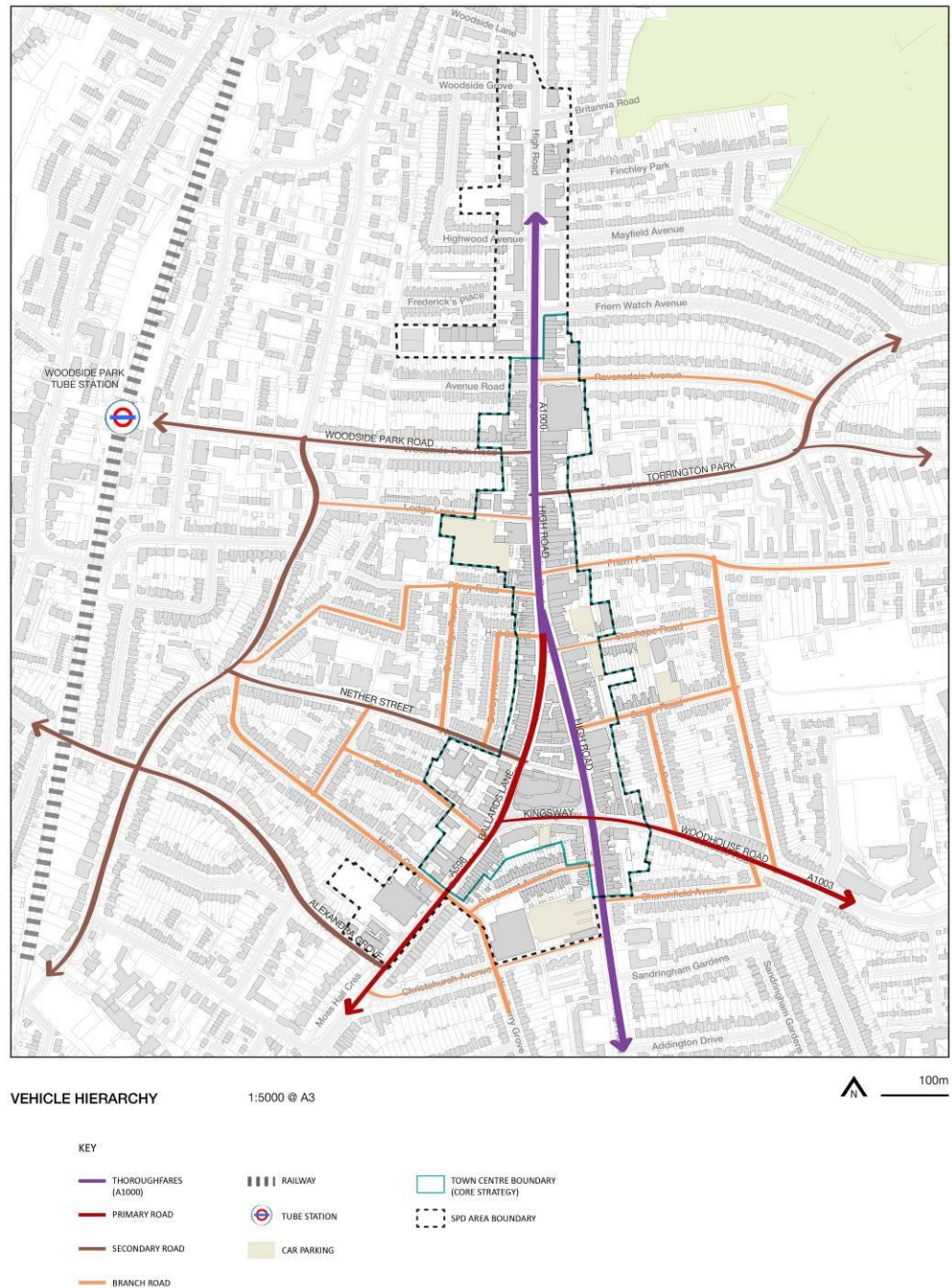
Source: BDP.

Roads Hierarchy

- 3.16 North Finchley town centre area is focussed around the High Road (A1000), and the junction at Tally Ho corner: Ballards Lane (A598), and Woodhouse Road (A1003). Secondary streets off the High Road provide links to east and west, which makes the town centre very well connected to surrounding neighbourhoods.
- 3.17 The High Road is very wide and busy road which often acts as a barrier to pedestrian and cycle movements. More details on each transport element are presented in **Chapter 6**.

Figure 8: Transport – Road Hierarchy

NORTH FINCHLEY TOWN CENTRE
DEVELOPMENT FRAMEWORK SPD



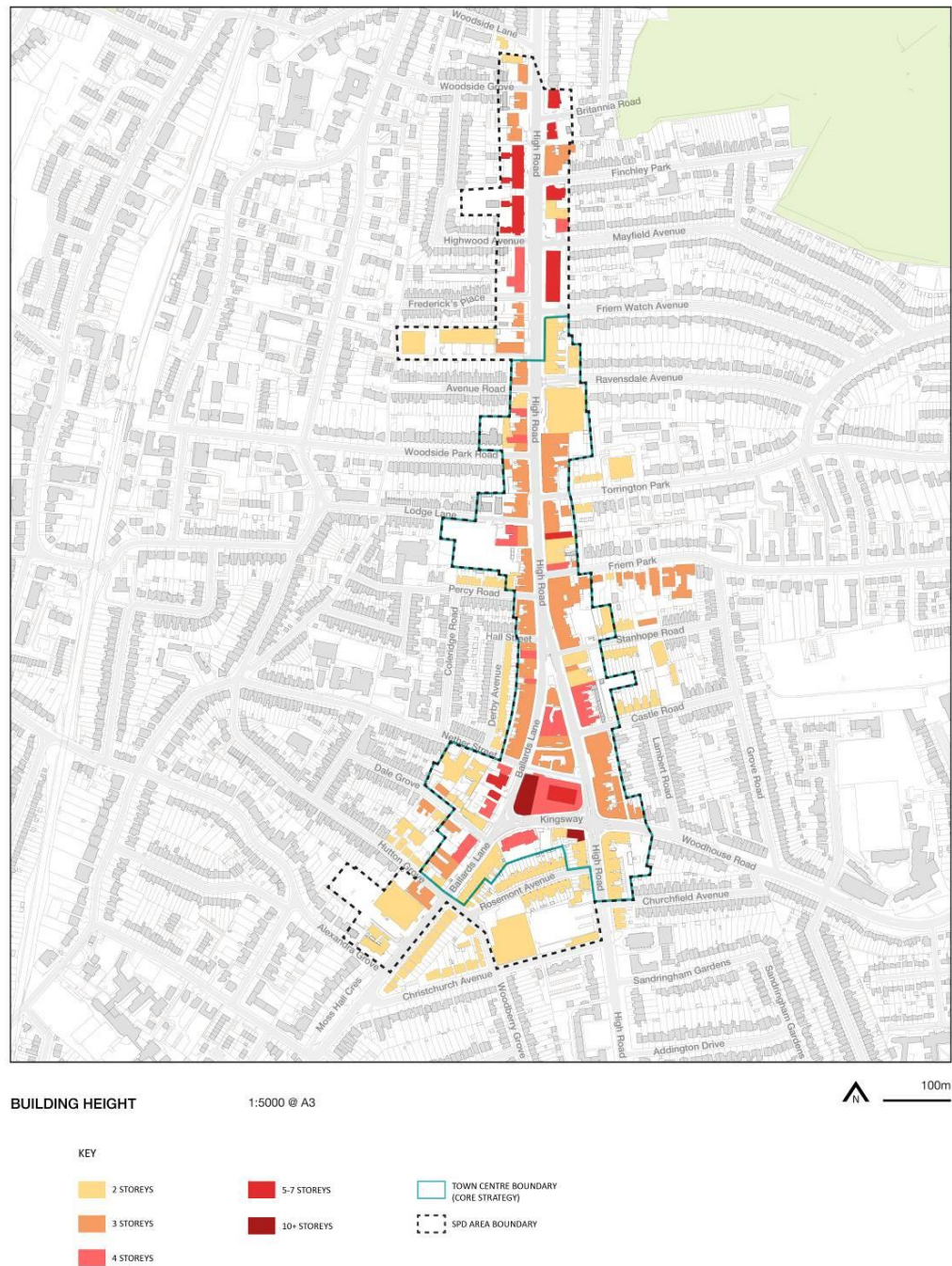
Source: BDP.

Building Heights

- 3.18 The majority of buildings along the high street are 3-storey high with upper floor being mostly residential, office or storage space.
- 3.19 The southern end of the High Street includes mostly 2-storey buildings.
- 3.20 The Arts Depot development, which includes an Aldi store and Bus station and ground and residential above is the tallest building in the town centre. It rises to 14 storeys, exceeding significantly most of the surrounding buildings.
- 3.21 The northern end of the study area includes several 5-6 storey high residential and commercial buildings.

Figure 9: Building Heights

NORTH FINCHLEY TOWN CENTRE
DEVELOPMENT FRAMEWORK SPD



Source: BDP.

Council-Owned Land

3.22 There is a portfolio of sites owned by the London Borough of Barnet. These include six car parks and an office block in the surroundings of North Finchley town centre. The total land area owned by the council is estimated above 2 ha⁴. These sites, illustrated in **Figures 10** below, include:

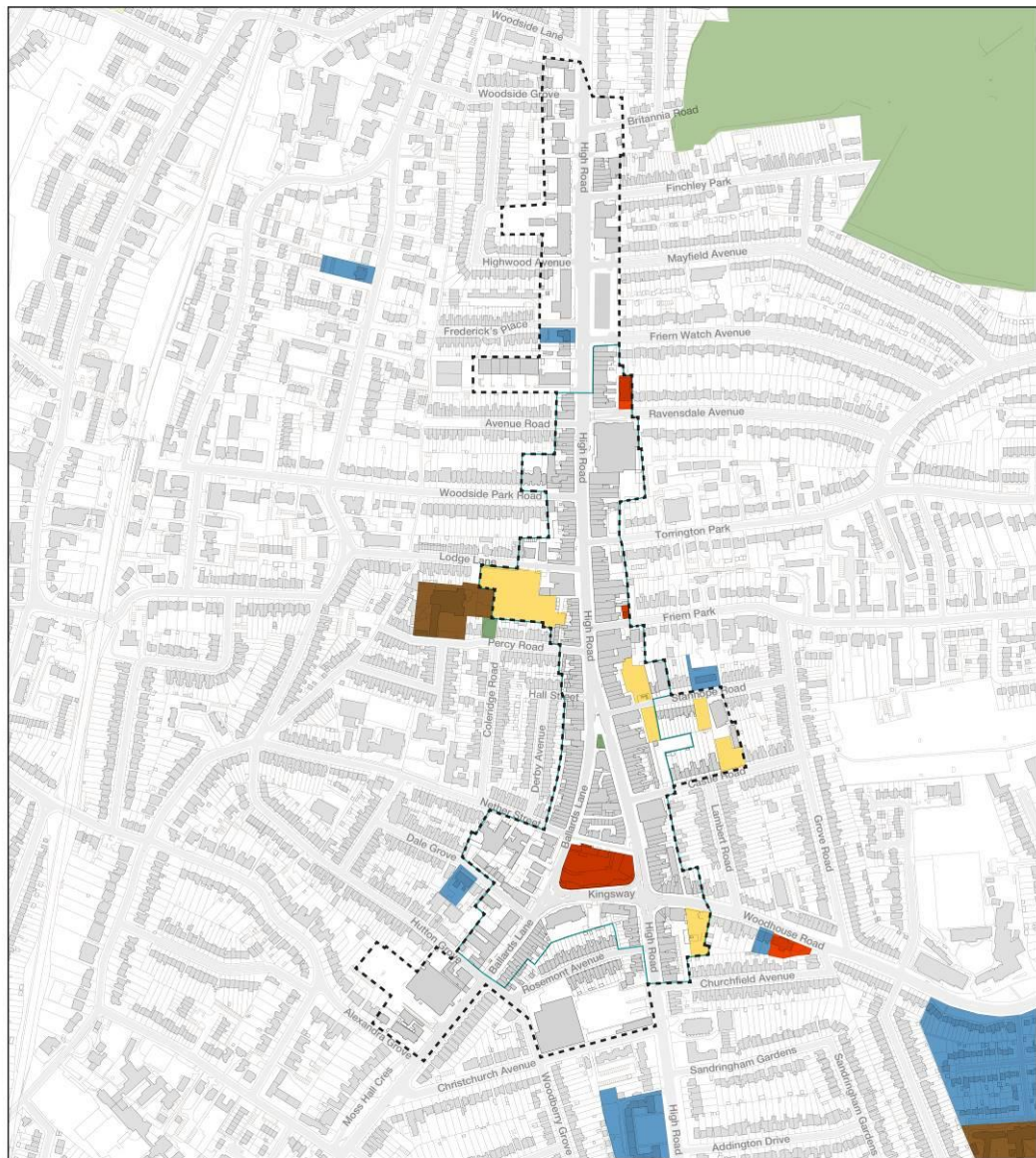
- Lodge Lane Car Park (0.9 ha)
- Stanhope Road Main Car Park (0.3 ha)
- Stanhope Road Top Car Park (0.1 ha)
- Stanhope Road Lower Car Park (0.1 ha)
- Castle Road Car Park (0.2 ha)
- Woodhouse Road Car Park and Bus Depot (0.3 ha)

3.23 The rest of the SPD study area is in a wide range of largely private ownerships

⁴ This is not a Land Registry calculation but an estimation based on our best knowledge (GIS calculation)

Figure 10: Ownership Map

NORTH FINCHLEY TOWN CENTRE
DEVELOPMENT FRAMEWORK SPD



LAND OWNED BY BARNET

1:5000 @ A3



100m

KEY

HIGHWAYS / CAR PARKS
 PARKS AND RECREATION
 HOUSING ESTATES

EDUCATION
 MISCELLANEOUS

TOWN CENTRE BOUNDARY (CORE STRATEGY)
 SPD STUDY AREA BOUNDARY

Source: LB Barnet – BDP.

Urban Analysis summary

- The majority of the town centre along the High Road is characterised by well-maintained 3-storey Victorian and Edwardian parades. The historic fabric contributes to the local character and the sense of place.
- The study area can be broadly divided into northern, central and southern zones, each with slightly differing overall character. The northern zone is primarily residential with greater building heights. The central zone comprises largely of small ground floor retail units, with terraced housing above. The buildings are generally 3 storeys in height, and are of mixed architectural quality. The southern zone has the triangle Tally Ho site as the focal point and has buildings heights of up to 17 storeys at the Arts Depot and a combination of more modern development as well as some influenced by a 1930s and modernist influence.
- The shop front quality along the High Road is mixed, with a large number of poor quality frontages.
- There is generally a lack of good quality public realm within the study area with few safe, pleasant spaces for people to gather and a lack of outdoor seating.
- There is a good mix of uses across the centre including employment, retail, restaurants, community and leisure.
- There are a cluster of bar / restaurants at the Tally Ho triangle and opposite the Bus Depot of the west side of the High Road which provide more of a focus for evening activities. In the central section of the town centre there are a number of coffee shops and cafes which emphasise daytime activity.
- The Town Centre feels dominated by cars and despite of the low level of vacancy and some good quality buildings, the area does feel a pedestrian friendly place where people tend to dwell.
- There are a significant number of car parks around the centre, owned by the Council as well as on street parking.

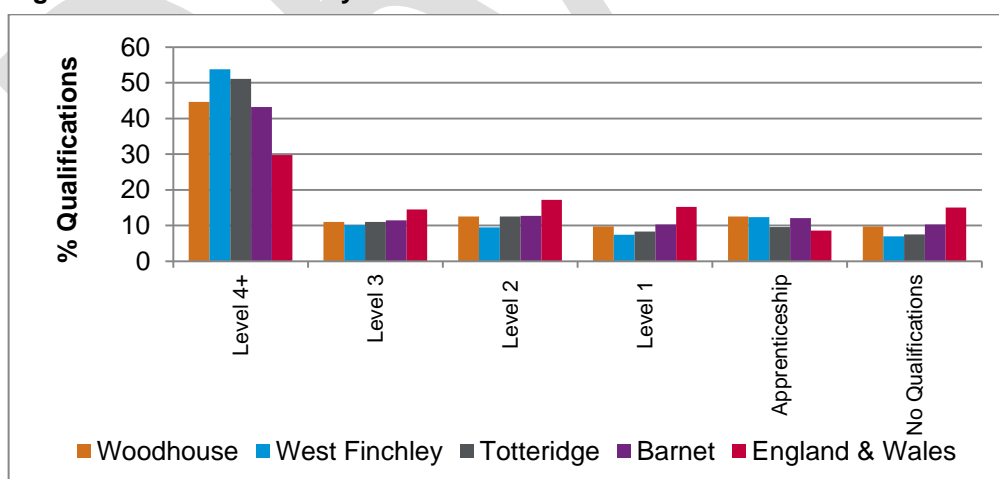
4 TOWN CENTRE DEMOGRAPHICS

4.1 This section analyses the town centre's local demographics. The success of the town centre is based on its footfall and visitor activities. Therefore, it is essential to understand the nature of the town centre visitors and users in order to provide a wide offer of services that meet their daily needs, and creates a welcoming environment.

4.2 The centre sits on the border of three wards, Woodhouse, West Finchley and Totteridge. The latter falls outside the town centre boundaries however due to its proximity (adjacent to the study area) it is considered that the south west part is served by North Finchley while the rest is served by Whetsone Town Centre. Accordingly, ward level review of statistics has been undertaken in terms of unemployment, occupation and skills. Key findings identified are:

- West Finchley ward has an unemployment rate reflecting the Borough average (7.7%), which is slightly above the national equivalent. Woodhouse and Totteridge have a lower unemployment rate (2013 data, ONS).
- A third of the residents in employment in West Finchley and Totteridge have a "professional" occupation. The equivalent for Woodhouse ward and Barnet (overall) falls to a quarter. The national equivalent is just above 17%.
- GLA ward level income data indicates that earnings are in line with the Borough average (£40,135 for West Finchley and Woodhouse combined) compared with £39,904 for Barnet (2013).
- The wards have high Level 4+ residents' qualifications compared to the national figure. However Woodhouse falls below the levels of the other two wards and is similar to the borough as a whole (Figure 11).

Figure 11: Qualifications by Ward



Source: 2011 Census (Table LC5106EW - Highest level of qualification by economic activity)

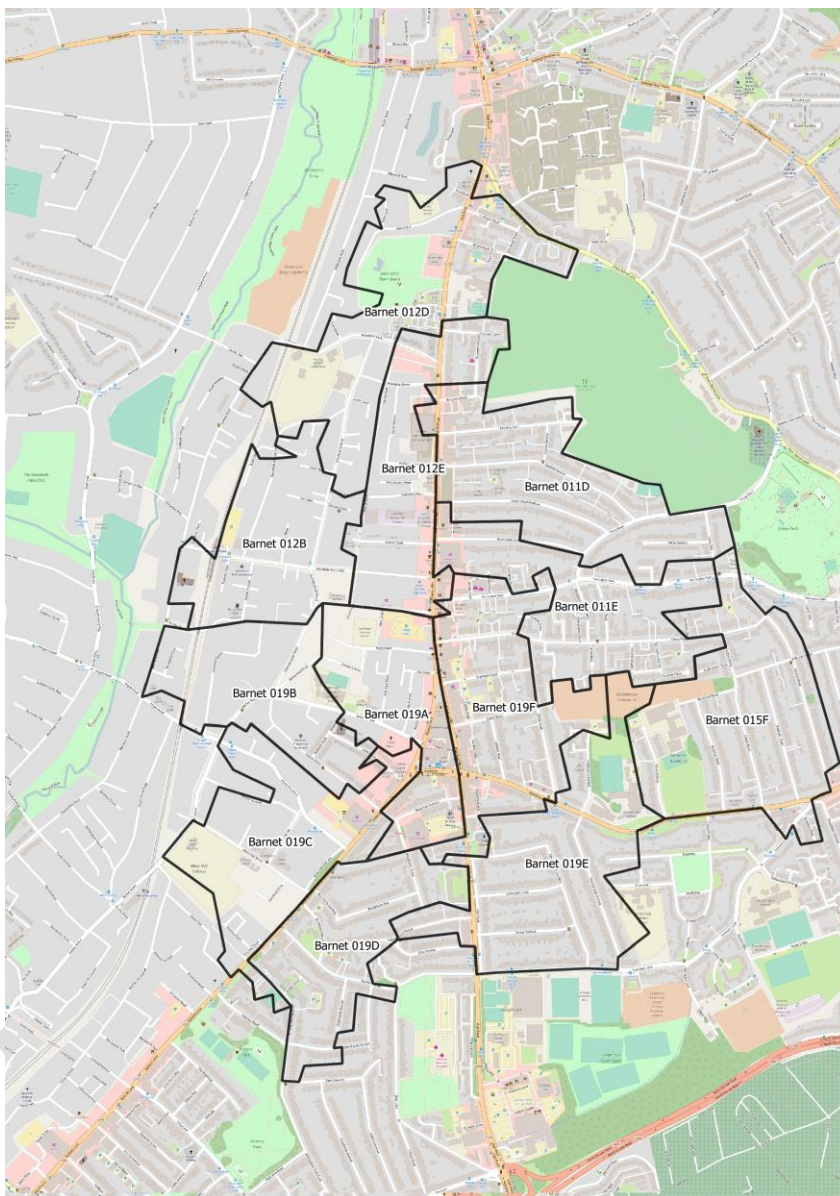
4.3 In order to better understand the town centre resident and user population and compensate for the broad intersection of wards occurring in the study area, more detailed analysis of Lower Super Output Areas (LSOAs) has been undertaken. The surrounding population is considered to be

affluent with an above average proportion of professional occupation groups and educational attainment.

4.4 The LSOAs identified for the town centre catchment, as presented in **Figure 12**, constitutes of the following 12 LSOA :

- Barnet 011D
- Barnet 011E
- Barnet 012B
- Barnet 012D
- Barnet 012E
- Barnet 015F
- Barnet 019A
- Barnet 019B
- Barnet 019C
- Barnet 019D
- Barnet 019E
- Barnet 019F

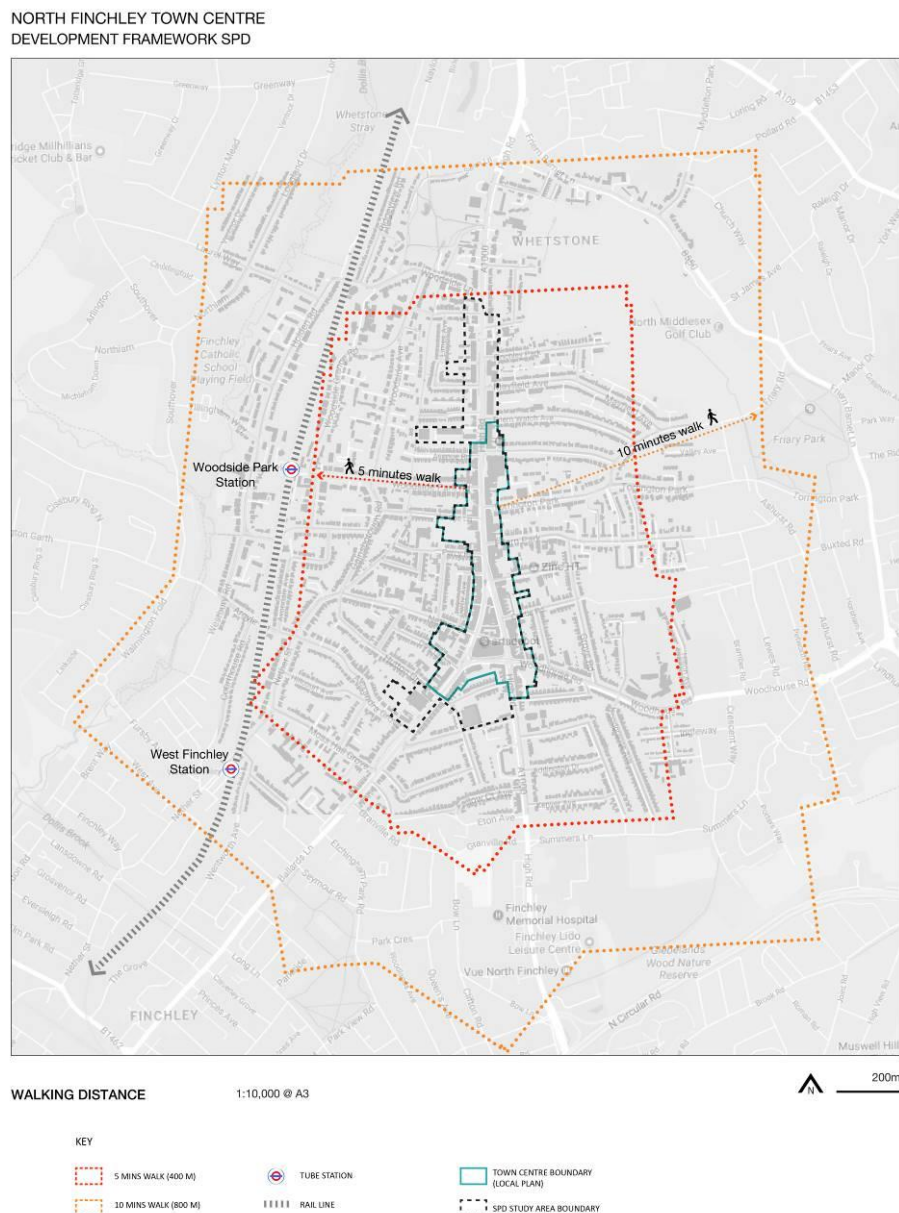
Figure 12: North Finchley Town Centre catchment, LSOA level



Source: ONS

- 4.5 Of note, the LSOAs identified broadly correspond to the catchment area of the town centre for a 5 minute walking time (straight line) as set out in figure 13 below. This straight line distance is estimated to represent an actual 5-10 minute walk time when taking into account local routes and roads.

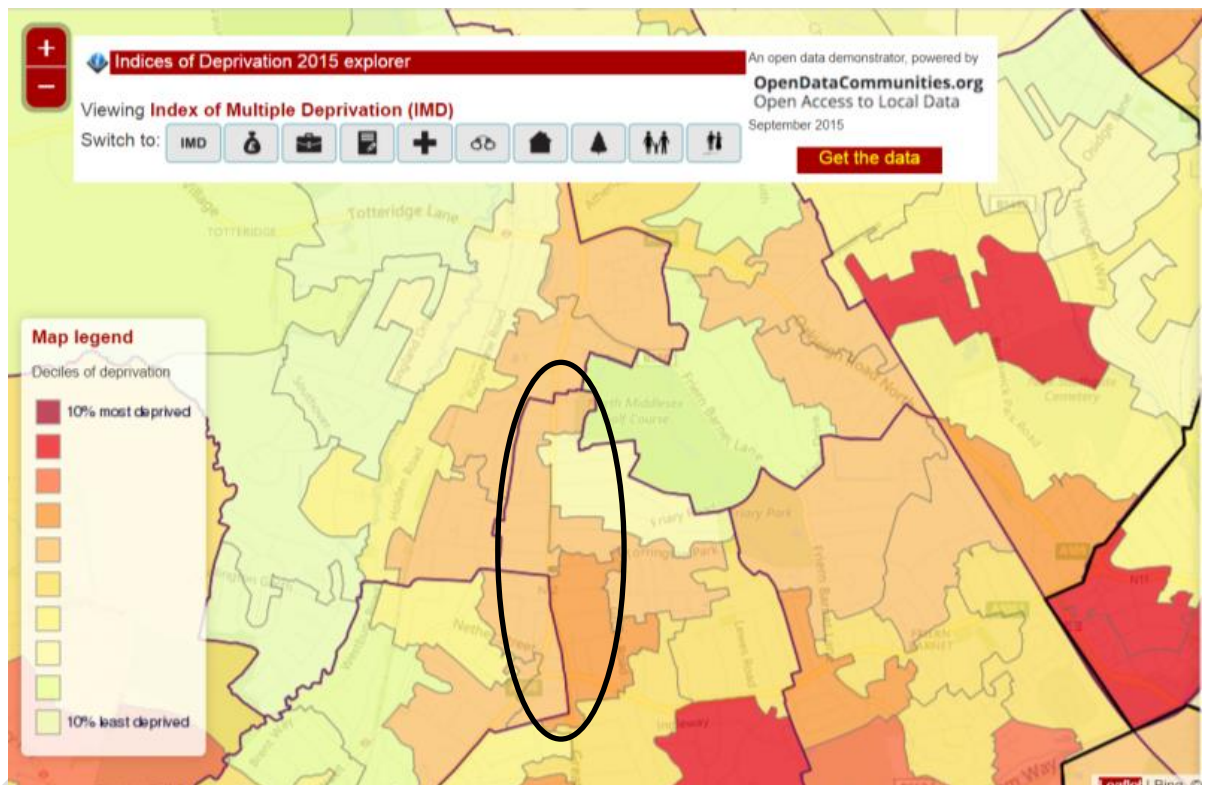
Figure 13: Town Centre 5 and 10 minute walk distance



Source: BDP

- 4.6 **Figure 14** reports on the overall index of Multiple Deprivation 2015 (CLG) by LSOA, with the town centre area highlighted. The LSOA representing the southern part of the town centre is darker in colour and is in the bottom 60% of the most deprived LSOAs in the country which indicates that there is local deprivation not readily identified in some of the stronger demographic indicators reported elsewhere..

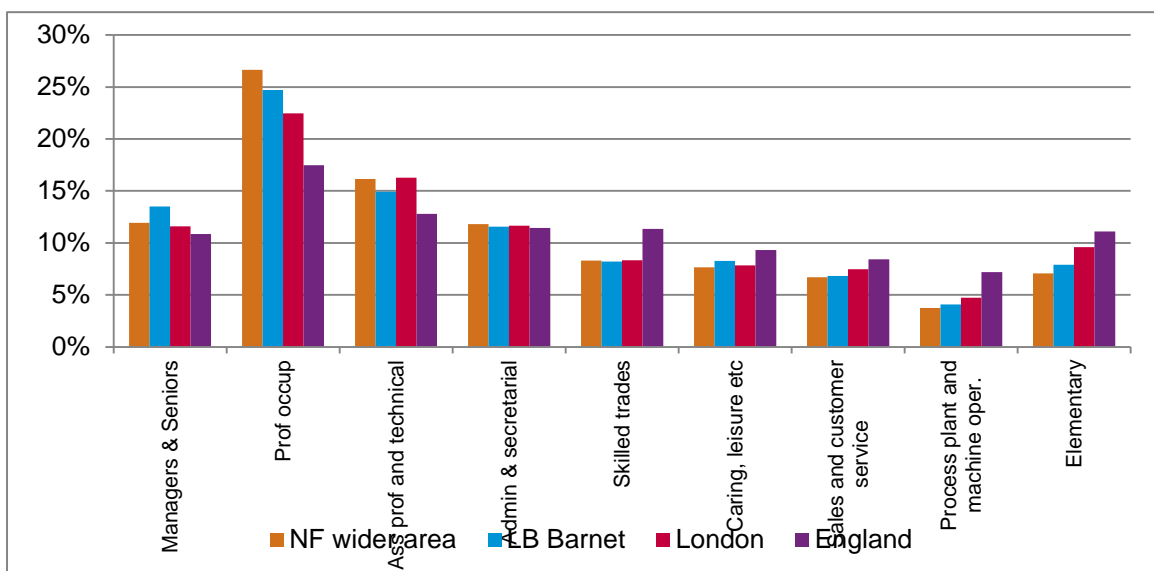
Figure 14: Index of Deprivation (Overall) 2015



Source: <http://dclgapps.communities.gov.uk/imd/idmap.html>

- 4.7 In terms of employment activity, the key occupations of the catchment area are Professionals (27%), followed by Associate Professionals (16%), as well as Managerial/Senior (12%) and Administrative (12%) occupations. Overall the categories have a similar distribution to London and Barnet as a whole albeit with a concentration of the higher end of occupational range (67% across the four first categories).

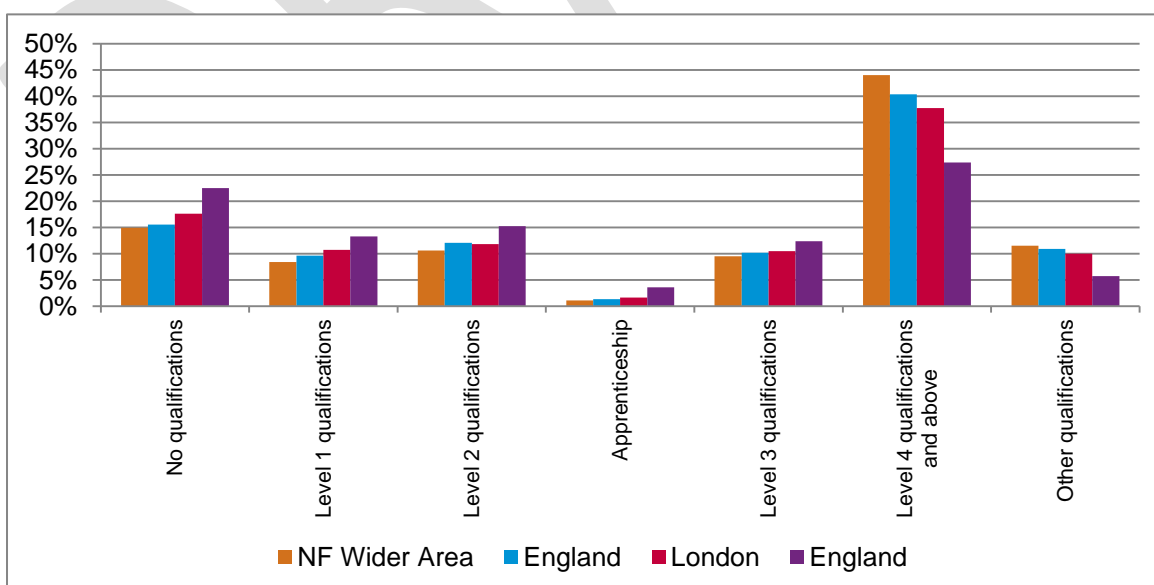
Figure 15: Occupations across North Finchley Town Centre catchment



Source: Census 2011

- 4.8 In terms of qualifications, the highest proportion of the population (44%) has a qualification of Level 4 or above which relates to a University Degree or Higher diploma (equivalent to NVQ4-5). This group has higher representation in the study area compared to the rest of the comparators. Conversely, people with no qualification or level 1 have the smallest representation in the study area compared to all the rest geographies (i.e. Barnet, London and England).

Figure 16: Qualifications in the Wider Area

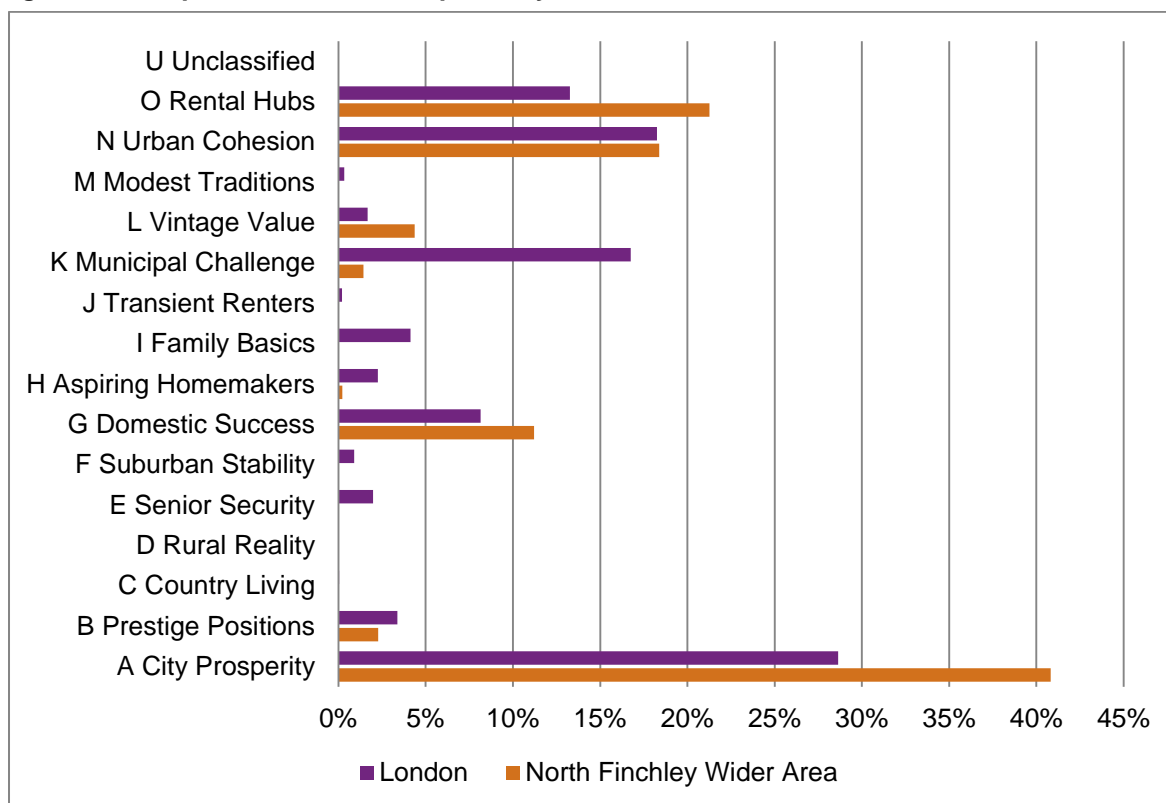


Source: Census 2011

- 4.9 In addition to Census data, analysis has been undertaken on the most recent Experian socioeconomic groups⁵ for the town centre's catchment area (Census Lower Super Output Areas), and compared with London as a whole). This relates to 9,024 households recorded across the 12 LSOA in Experian Mosaic in 2015. Definitions referred to below are drawn from **Experian Mosaic Groups** classification.
- 4.10 The predominant social group residing in the wider area of North Finchley falls within *City Prosperity*. This group, according to Experian, relates to relatively wealthy families enjoying city life in comfort and residing in inner suburbs of the capital (41%). The detailed definition available through Experian is:
- "City Prosperity refers to high status positions. Commanding substantial salaries they are able to afford expensive urban homes. They live and work predominantly in London, with many found in and around the City or in locations a short commute away. Well-educated, confident and ambitious, this elite group is able to enjoy their wealth and the advantages of living in a world-class capital to the full".*
- 4.11 *City Prosperity* has the highest representation across the wider area (41%). This is higher than the London equivalent of 29% and Barnet's of 28%. The second most represented group are *Rental Hubs*. This relates to:
- "Predominantly young, single people in their 20s and 30s who live in urban locations and rent their homes from private landlords while in the early stages of their careers, or pursuing studies."*
- 4.12 *Rental Hubs* representation across the wider area of 21%. London's equivalent is 13% and Barnet's 16%.

⁵ 2015

Figure 17: Experian Mosaic: Groups Analysis, Households 2015



Source: Experian – GL Hearn analysis

- 4.13 The third most common household category is *Urban Cohesion* (18%). This, according to Experian definitions relates to:

“settled extended families and older people who live in multi-cultural city suburbs. Most have bought their own homes and have been settled in these neighbourhoods for many years, enjoying the sense of community they feel there.”

- 4.14 In particular, the following two subgroups fall within this category, according to Experian:

- *“an elderly population who own properties in inner suburbs with good access to amenities; and*
- *multi-cultural urban communities with usually strong South Asian tradition.”*

- 4.15 Urban Cohesion Group is represented by 18% in North Finchley Wider area. This is similar to Barnet’s rate of 18% and below London’s rate of 20%.

- 4.16 We analysed the wider household ethnic group categories as recorded in Census⁶ to understand further the multicultural communities that fall within group *Urban Cohesion* in the above analysis. The majority (62%) of the North Finchley surrounding area⁷ recognises themselves as White, followed by 22% Asian/Asian British of which Indians have the higher representation (52%), followed by Chinese (10%) and Pakistani (6%).
- 4.17 The group with the fourth highest representation is Domestic Success (11%). The representation of this group across London is lower at 8% while in Barnet reaches 14%. Based on Experian definition this group consists of:
- “high-earning families who live affluent lifestyles in upmarket homes situated in sought after residential neighbourhoods. Their busy lives revolve around their children and successful careers in higher managerial and professional roles.”*
- 4.18 London, as a whole, has a significantly high portion of those in the *Municipal Challenge* group. According to Experian this group relates to:
- “long-term social renters living in low-value multi-storey flats in urban locations, or small terraces on outlying estates. These are challenged neighbourhoods with limited employment options and correspondingly low household incomes.”*
- 4.19 This group relates typically to council estates and communities in social housing which have limited representation in North Finchley, potentially reflecting higher levels of affluence locally. Municipal Challenge has 17% representation across London. In North Finchley the equivalent is just 1%.
- 4.20 Other groups that worth highlighting is Vintage Value and Prestige Positions Groups. The first one refers to “elderly people reliant on support to meet financial or practical needs”. This has a representation of 4% in North Finchley against a 2% across London.
- 4.21 Finally 2% of the catchment population falls within Prestige Positions. This group refers to “established families in large detached homes living upmarket lifestyles”. London’s equivalent is slightly higher reaching 3%.

Demographics summary

- The centre is at the divide of three wards (Woodhouse, West Finchley and Totteridge) all of which perform broadly in line with the borough average in terms of skills, occupation, income and unemployment.

⁶ Census 2011 - KS201EW

⁷ Census KS201EW - Ethnic group - Output Areas: Barnet 012B, Barnet 012D, Barnet 019A, Barnet 019B, Barnet 019C, Barnet 019D, Barnet 019E, Barnet 011D, Barnet 012E, Barnet 011E, Barnet 019F, Barnet 015F

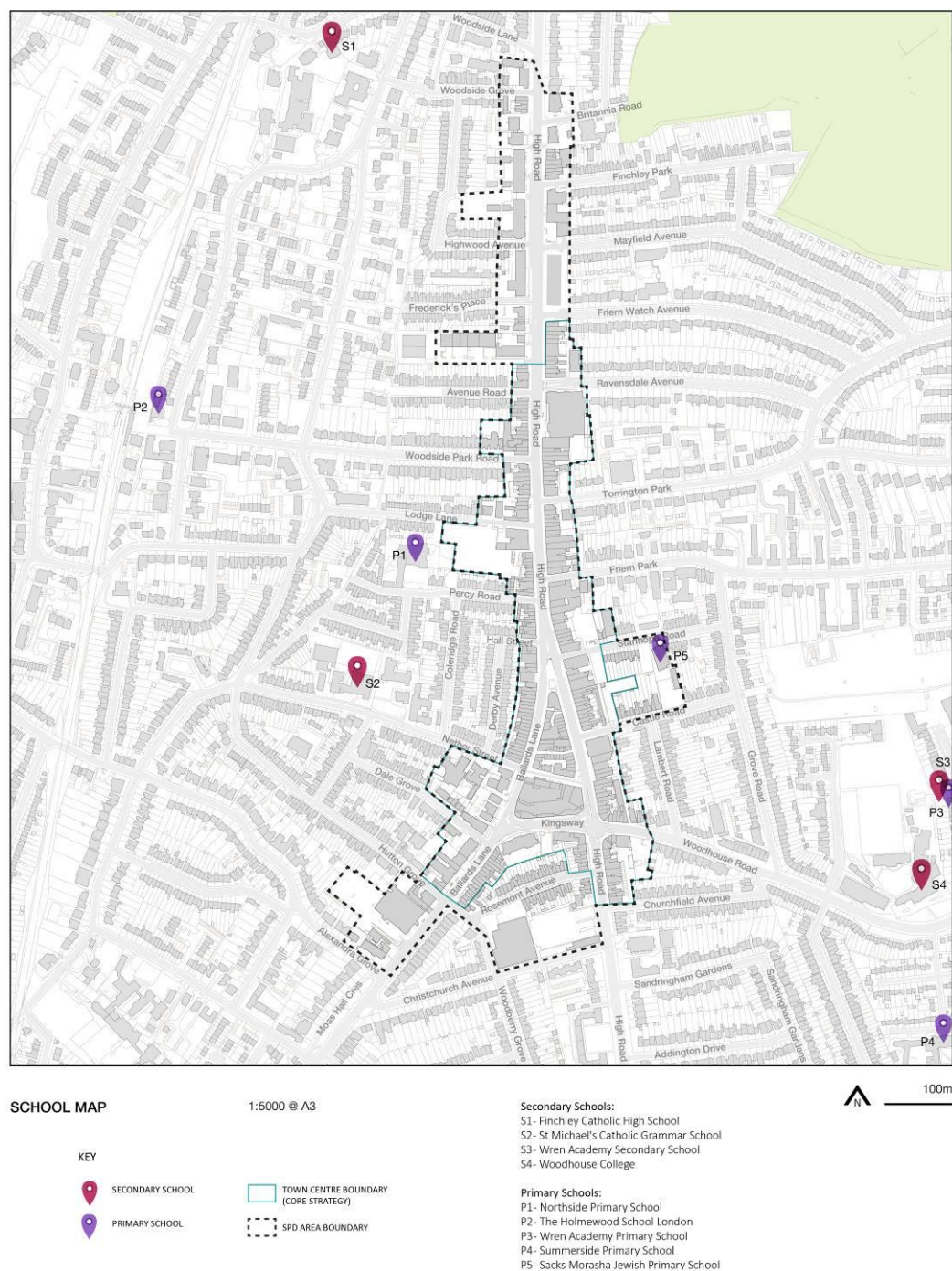
- Analysis of LSOAs local to the town centre indicates comparable or higher levels of highly skilled and higher band occupations compared to the borough which itself outperforms the London average.
- Experian's Social Mosaic Analysis reveals that the majority (52%) of the households around North Finchley are mainly wealthy and affluent urban/suburban families. City Prosperity and Domestic Success Groups refer both to modern middle class wealthy families. There is also a relatively high representation of young professionals or students (21%) and multicultural families (18%).
- The findings indicate that there is an affluent social platform across the wider area of North Finchley. However there are pockets of deprivation in the town centre catchment area particularly to the south east. The presence of uses such as betting shops and payday loan lenders are likely to reflect this demography. Likewise the number of specialist shops indicates links with a range of communities across West Finchley and Woodhouse wards. It is fair to say the town centre has a mixture of uses and users. .

5 TOWN CENTRE PERFORMANCE

- 5.1 This section considers some of key statistical indicators for the town centre and also references how these are considered to have changed over time. Qualitative commentary is also included as appropriate.
- 5.2 There is a good representation of a range of uses across the town centre. The vast majority (79%) of the town centre uses falls within A-Class of which 65% relate to A1 retail units and 16% relate to restaurants.
- 5.3 The provision of community facilities includes a dental care unit, a vet, the Wellbeing Centre in the Grand Arcade, the Pure Gym and the Arts Depot together with the Library at Ravensdale Avenue. , There is a significant number of schools in reasonable proximity to the town centre. These include **(Figure 18)**:
- Secondary Schools:
 - Finchley Catholic High School
 - Friern Barnet Secondary School
 - St Michael's Catholic Grammar School
 - Wren Academy (both primary and secondary)
 - Woodhouse College
 - Primary
 - Northside Primary Schoold
 - The Holmewood School London
 - Wren Academy (both primary and secondary)
 - Summerside Primary Schoold
 - Sacks Morasha Jewish Primary School

Figure 18: Schools in Proximity to North Finchley

NORTH FINCHLEY TOWN CENTRE
DEVELOPMENT FRAMEWORK SPD



- 5.4 The number of schools in part reflects the nature of housing and demographics in the local area, particularly tending toward more affluent family homes. The secondary school cohort is also likely to be a source of activity in the town centre in the late afternoon.
- 5.5 There is a concentration of restaurants and takeaways (within A5 Use Class) at the south part of the Town Centre within 15-20 minutes walking distance of the majority of the schools.
- 5.6 In terms of convenience goods, Sainsbury's is the main foodstore in the heart of the linear alignment of the town centre. In addition a Tesco Express has recently opened in the high street. An Aldi is at the ground floor of the Arts Depot at Ballards Lane. Extended south at Ballards Lane, within less than 3 minutes walk, there is a large format Waitrose.
- 5.7 There is a relatively limited offer of comparison goods principally due to the significant offer found at Brent Cross Shopping Centre and Central London, as well as the connectivity to town centres such as Wembley and Wood Green. The comparison retailers across the town centre include Waterstones, WH Smith, River Island, New Look, Clark Shoes, Argos, Boots, Superdrug, Robert Dyas and Poundland. There are also a number of independent retailers with the majority at the value end of the market. Homebase is also located south of the town centre, within again less than 3 minutes walking distance. There is a limited offer of national and higher end fashion brands such as Jigsaw, Mint Velvet, White Stuff and Whistles that might typically match locations with a similar socioeconomic suburban environment (i.e. Muswell Hill). Finally, there is a relatively high concentration of betting shops, charity shops and payday loan lenders
- 5.8 There is a good range of independent restaurants, including Turkish, Indian, Italian Thai, Japanese, Middle Eastern and Chinese, across the town centre. Most of the branded offer is at the coffee shop and fast food end of the market, with Costa Coffee, Caffe Nero, Starbucks, McDonalds all represented in North Finchley. Despite the wide range of restaurants these are broadly considered to represent a lower end of the market, with Whetstone having a stronger reputation for restaurants and evening economy. There is (similarly to comparison goods) limited offer of mid and upper market brands that are typically associated with affluence in the resident population such as Gail's Bakery, Cote Brasserie, Carluccio's and Bill's. Mid market chain restaurants such as Pizza Express and Nandos are also not represented locally. However the relatively recently opened Bohemia (2014) is a more modern and airy large pub which has been successful. The Tally Ho can also be considered a successful pub and one of the centre's key landmarks.
- 5.9 The Arts Depot is the key leisure hub of the town centre. This comprises of a 395 seat theatre, 148 seat studio theatre, gallery, café, bar and studios. The neighbouring uses (i.e. Bus Depot and Grand Arcade), the design of the surrounding blocks; the associated public realm, and the lack of

overlooking, in general, are considered to be factors that affect the attractiveness of the Arts Depot. Of note there is little to compliment the evening economy in terms of places to eat out nor outdoor seating and ambience to support the Arts Depot.

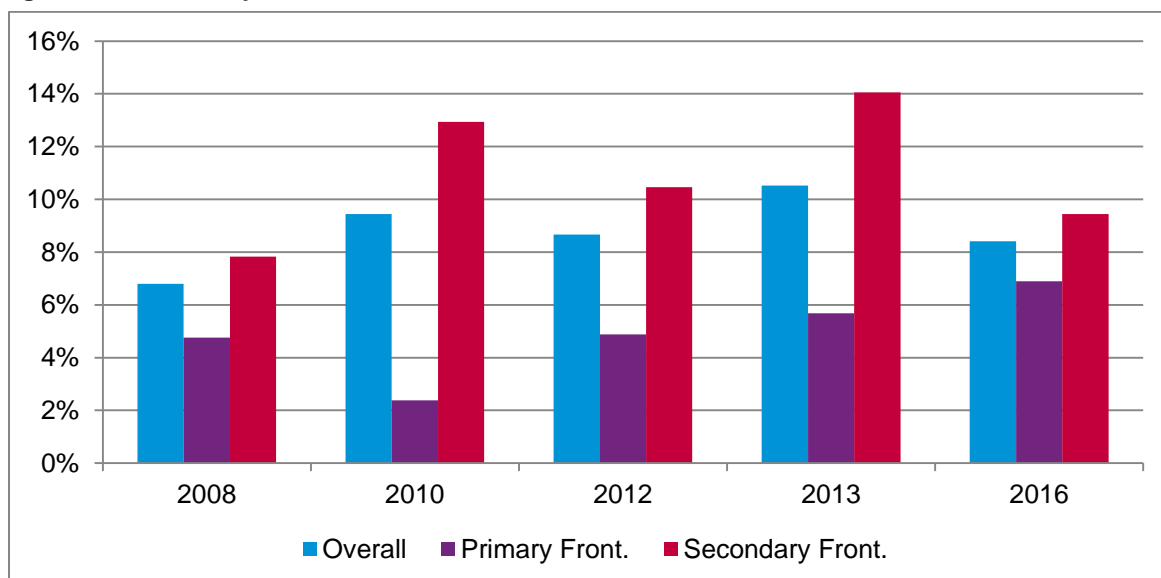
- 5.10 The town centre has also a high representation of occupiers such as betting shops, loan lenders, charity shops and off license shops. In particular, there are five betting shops across the High Road according to our site visits. A similar amount of Charity shops are also located across the high street. Loan Lenders have also some representation but in a limited level. There has been recorded a significant amount of Off License News Agents across the town centre.
- 5.11 Finally there has been recently recorded an increase on nail shops across the town centre. Of course this Use class is ancillary to town centre uses however a high concentration might create advert impacts occupying potential space of comparison retail.

Vacancy Rates

- 5.12 In general there is low vacancy across the town centre being 8% (18 units, 6 primary and 12 secondary) as of June 2018 compared with a London average of 10%⁸. The graph below (Figure 19) shows the North Finchley vacancy rates recorded in 2008, 2010, 2012, 2013 and 2016. Although not recorded annually there is enough evidence to allow some historic analysis.
- 5.13 The only pre-recession record relates to 2008 where the overall rate was 6%. During the recession the rate vary between 9% and 11%. The current levels suggest a recovery which has fallen 3% from the 2013 rate.

⁸ Health Check 2013

Figure 19: Vacancy Rates



Source: Barnet Town Centre Monitoring Database

- 5.14 The graph also highlights the constant difference of vacancy levels between primary and secondary frontages. The primary frontages have tended to remain low compared to the secondary equivalent. This is mainly due to the vacancy rates concentrated in Tally Ho Triangle which suffers from the traffic island effect and hosts the Grand Arcade, with the 15 small units in the enclosed space struggling to maintain long lets despite investment.
- 5.15 There has been a reported fall (-14%) of the retail uses across the town centre based on monitoring information between 2008 and 2016⁹. Nonetheless, there remains a high proportion of secondary frontages in the town centre. In particular the south parts of the centre are considered to suffer from poor public realm and a range of inconsistent shop frontage design including poor aesthetic plastics. As a result these units have a higher vacancy rate than the primary area.

Housing Delivery and Prior Approvals in North Finchley

- 5.16 A total of 230 residential units¹⁰ have granted permission since 2011/12 within North Finchley town centre boundary. This relates to 10% of all the residential units within Barnet's town centre boundaries for the same period (a total of 2,300+ units).
- 5.17 Barnet's target as set out in the London Plan (March 2016) is to deliver 2,349 net new homes per year. Barnet's Local Plan target reflects Barnet's previous London Plan target of 2,255 net new homes per year and aims to provide 28,000 additional homes by 2025/26.

⁹ In 2008 the total number of town centre units monitored was 250 decreased to 214 in 2016.

¹⁰ LB Barnet monitoring databases

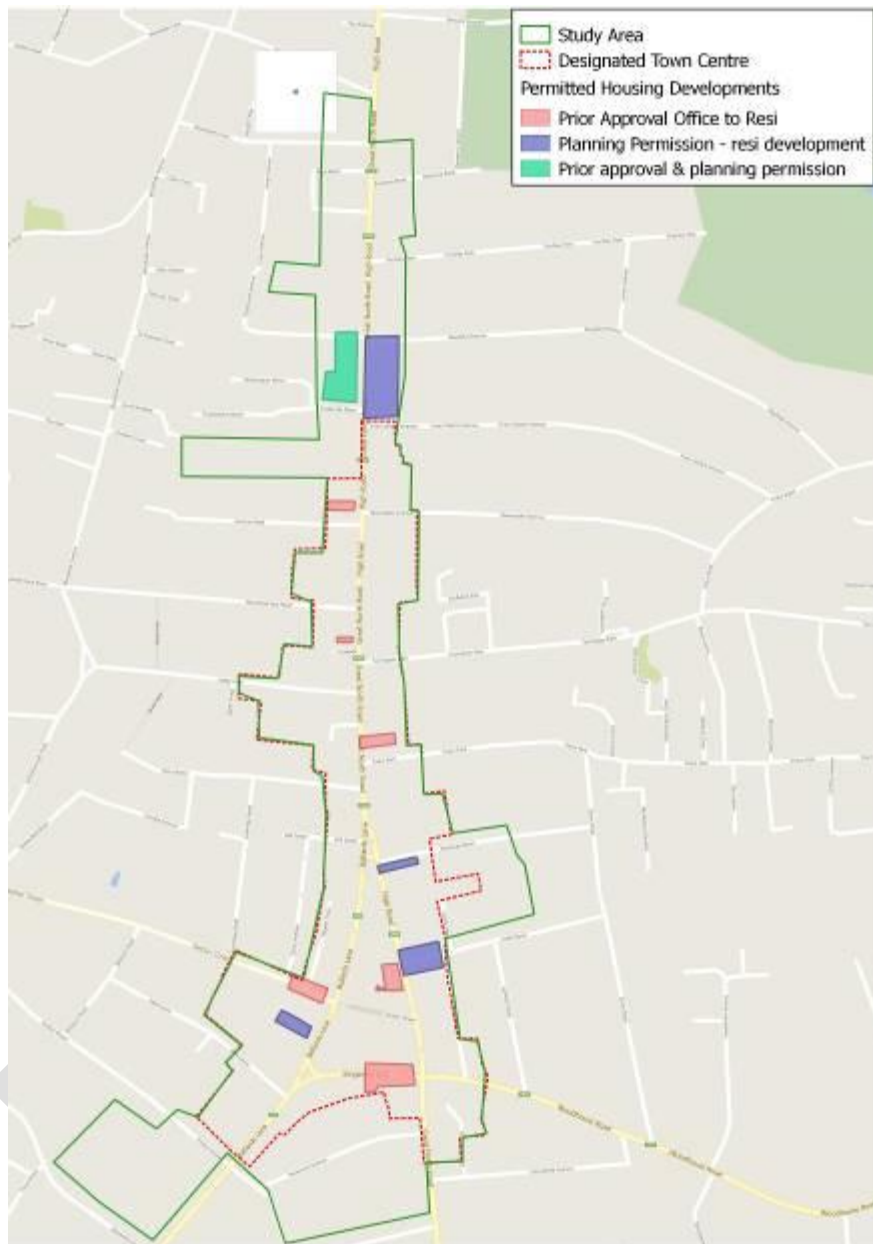
- 5.18 Demonstrating a 5 year supply of deliverable housing sites is a requirement of the National Planning Policy Framework. Based on current consents and projected delivery of allocated sites Barnet can demonstrate a deliverable supply with a 6% surplus based on the London Plan target of 2,349. Based on the Local Plan aim to deliver 28,000 and net delivery to date Barnet can demonstrate a deliverable supply with a 5% surplus.
- 5.19 Since 2013, a number of prior approval applications for the conversion of office (B1a Use Class) to residential uses have been consented (**Table 1**). This relates to a significant floorspace of office to be converted to around 150 residential units. For the same period (2013-16), 156 prior approvals have been approved across Barnet with 60% relate to sites within the town centres and an additional 12% to sites on town centre edges. In addition there have been planning applications approved for a number of further office conversion, including 60 units at Solar House in 2012. Overall there has been a reduction in the office stock in the centre due to the level of residential demand.

Table 1: North Finchley Prior Approvals

Address	Units	Ref
Finchley Centre (Opp Site 3) 707 High Road N12 0BT	89	16/5692/PNO - Ground Floor (46) - approved 16/7473/PNO - 1st - 8th floors (43 units) - approved
Unit 3 778 - 780 High Road London N12 9QR	1	16/6873/PNO - approved
827 High Road London N12 8PS	1	16/0813/PNO - approved
869 High Road London N12 8QA	10	17/0786/PNO - approved
Solar House 915 High Road London N12 8QJ	27	16/4787/PNO - approved
Tally Ho Triangle Rex House 354 Ballards Lane London N12 0EH	8	15/02178/PNO - approved
319 Ballards Lane London N12 8LY	16	14/07706/PNO - approved
327-329 Ballards Lane, London, N12 8LT	1	F/04962/11 - approved

Source: LB Barnet planning portal

Figure 20: Prior Approvals and Planning Permissions (2012-2017)



Source: LB Barnet planning portal – edited by GLH

Town Centre Performance Summary

- There is a diverse representation of uses across the town centre with 79% being A-Class of which 65% relate to A1 retail units and 16% relate to restaurants. There are also community, culture and leisure uses – including the Arts Depot – and a considerable number of schools both primary and secondary in the local area.
- There is a strong convenience goods offer with Sainsbury's, a Tesco Express, an Aldi and south at Ballards Lane, within less than 3 minutes walk, a large format Waitrose.

- There is a relatively limited offer of comparison goods albeit with some multiple retailer presence as well as a number of independent retailers with the majority at the value end of the market. There is a limited offer of national and higher end fashion brands that might typically match locations with a similar socioeconomic suburban environment.
- There is a good range of independent restaurants, most of the branded offer is at the coffee shop and fast food end of the market. Despite the wide range of restaurants these are broadly considered to represent a lower end of the market, with a limited offer of mid and upper market brands. However the relatively recently opened Bohemia (2014) is a more modern and airy large pub which has been successful.
- In general there is low vacancy across the town centre being 8% as of June 2018 compared with a London average of 10%, although it is higher in the secondary frontage.
- A total of 230 residential units have been granted permission since 2011/12 within North Finchley town centre boundary.
- Since 2013, a number of prior approval applications for the conversion of office (B1c Use Class) to residential uses have been consented at around 150 residential units. Overall there has been a reduction in the office stock in the centre due to the level of residential demand.

6 TRANSPORT ANALYSIS

6.1 This section summarises the transport baseline position by mode of transport.

Walking

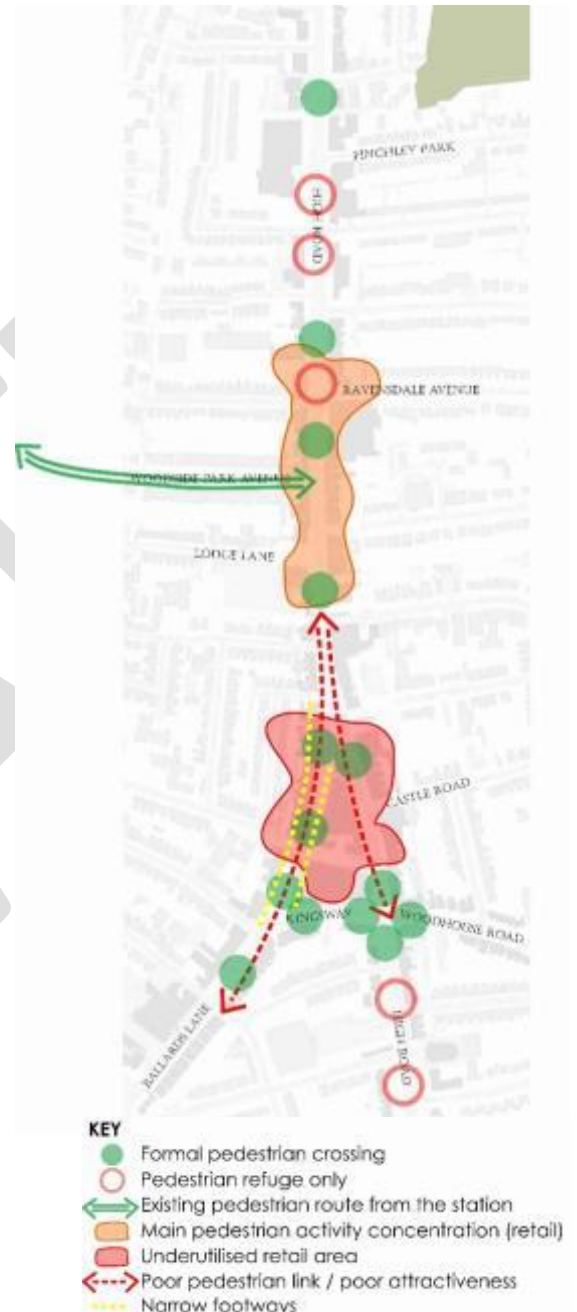
6.2 Conditions for pedestrians in the area are generally favourable in terms of footway widths and connections. However, the High Road's through traffic carrying function and extensive carriageway width means that perceived severance between the east and west sides of the road is a significant issue. Formal signal controlled crossings are effective in providing crossing facilities at key locations, but inconvenient and hazardous for those wishing to cross elsewhere. Such informal crossing is apparent and meets clear desire lines to some extent, though indicating a need to better provide for east-west connectivity.

Issues:

- Vehicle dominated environment
- East-west pedestrian crossing severance
- Good standard of footways – particularly north of Tally Ho public house
- Convenient and regular formal pedestrian crossings along the corridor
- Substantial road crossing widths to be overcome
- Road crossing particularly awkward on gyratory southern arm
- Footway width narrow in some key sections
- Poor wayfinding

Opportunities

- Improve wayfinding and signing
- Widen footways (narrow carriageways)
- Provide additional and improved pedestrian crossings
- Limit vehicle access to Ballard's Lane (between Kingsway and Hall Street)



Cycling

- 6.3 As currently arranged, the area is not conducive to cycling with a general lack of cycle facilities on the High Street carriageway to afford protection from motorised traffic adding to accessibility issues related to the one-way gyratory. Also, there is little elsewhere too in terms of information or parking facilities. Cycle access and wayfinding to and around North Finchley are in need of improvement also. There is though clearly a great deal of scope to improve these conditions to promote cycling whilst acknowledging the areas outer London location and wider topography mitigate against inner-London usage levels.

Issues:

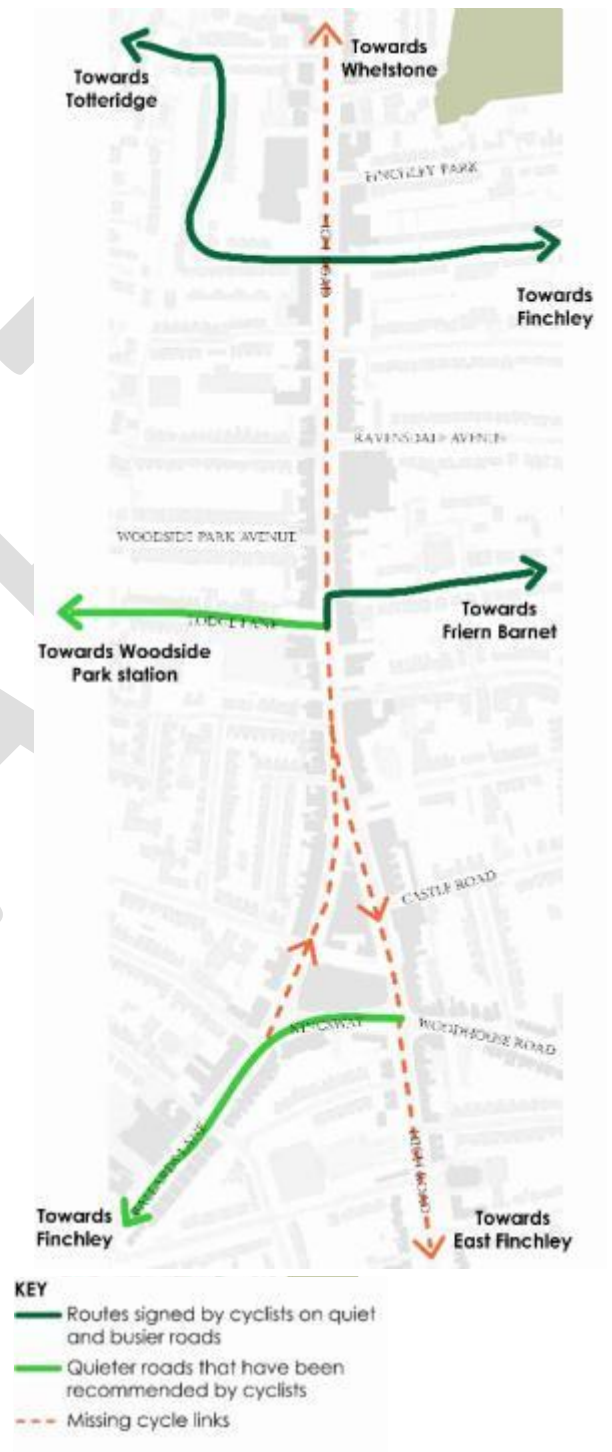
- Dominant and intimidating general traffic flows
- Lack of on-carriageway cycle provision
- One-way gyratory and cyclist accessibility
- Infrequent road crossing facilities
- Lack of cycle parking facilities
- Poor cycle route information

Opportunities:

- On-carriageway dedicated cycle provision
- Strengthening cycle route wayfinding and signing
- Additional cycle parking storage
- Improve cycle facilities and infrastructure (Advance Stop Lines etc.)



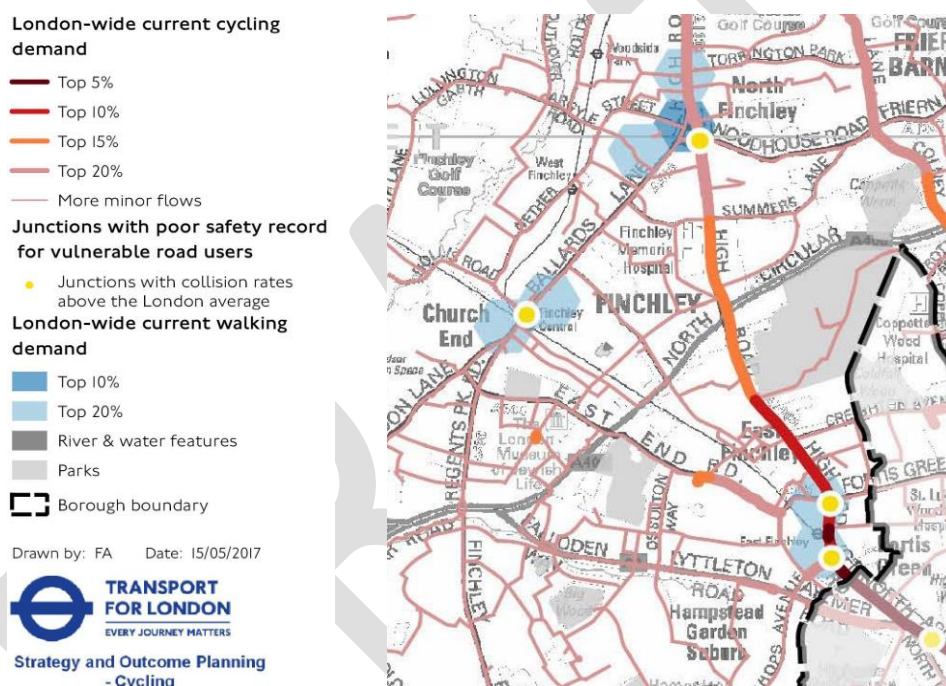
No available cycle lane at High Road – Cyclists are exposed to traffic



Cycling Connections

- 6.4 As part of the Mayor's Healthy Streets Approach, Transport for London are developing a plan for a coherent cycle network across London that will complement walking and public transport priorities. As part of that initiative, the Strategic Cycling Analysis (SCA), June 2017 present the results of various studies identifying corridors and locations where cycling demand could justify future investment both now and in the future. As shown by Figure 21, the Highgate to North Finchley corridor presently exhibits notable demand to the south of the corridor, lessening in the North Finchley area, though still in the Top 20% of London-wide cycling demand.

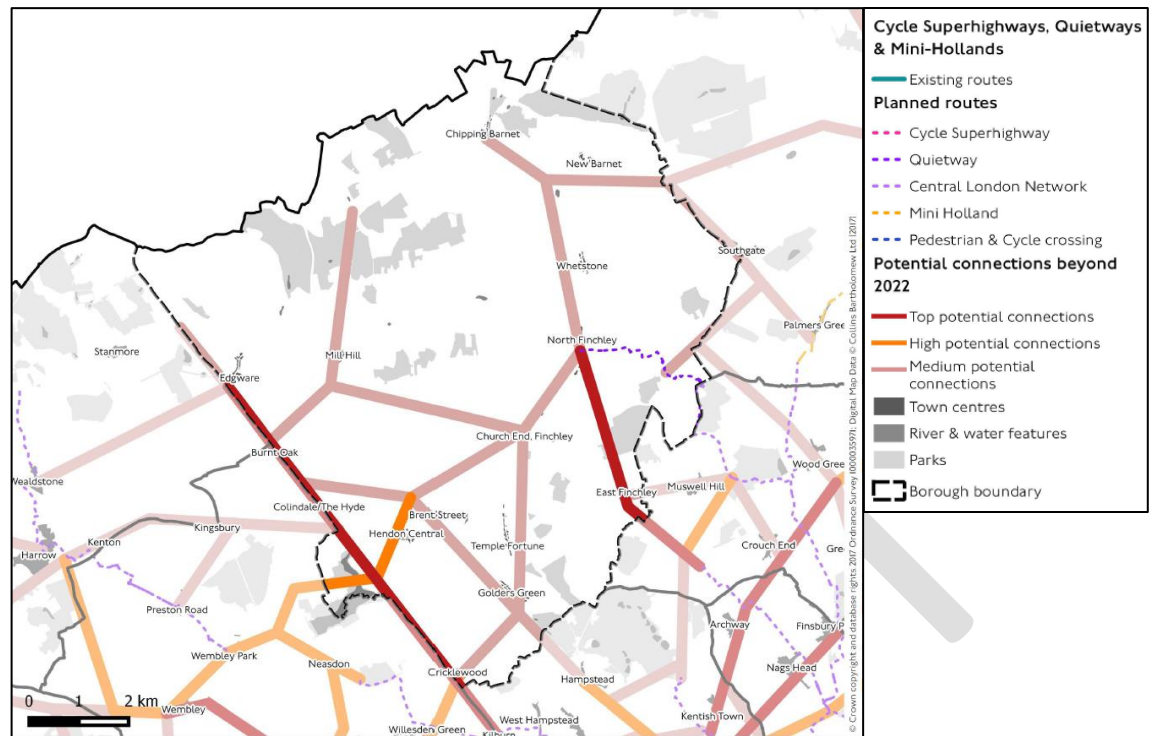
Figure 21: Current Cycling Demand



Source: Strategic Cycling Analysis, TfL (June 2017)

- 6.5 In identifying *future* cycling demand, the Highgate to North Finchley corridor is one of the 25 identified with the greatest potential for contributing to the growth of cycling in London to help achieve the Mayor's ambitions for Healthy Streets, see further diagram extract below.

Figure 22: Cycling Network



Source: Strategic Cycling Analysis, TfL (June 2017)

- 6.6 The document also identifies where demand for cycling, walking and public transport coincide, thus highlighting where investment is most needed to improve sustainable transport modes together. That further analysis suggests that North Finchley may benefit especially from improvements to the environment for both cycling and walking (pg. 27), with benefits also accruing to road safety for cyclists and walkers (pg. 29). The analysis then points to where, on some strategically important corridors, high cycle demand and high bus demand may coincide and good provision for buses, cycles and general traffic may be offered to all users on the same road (from pg. 31 on).
- 6.7 TfL's Strategic Cycling Analysis is encouraging for cycle growth on the Highgate to North Finchley corridor, as it is for the benefits of developing initiatives and measure to benefit walkers, bus passengers and road safety. Further subsequent examination of the information source would be beneficial to explore the demand and movement patterns more closely, particularly for discrete areas, such as the masterplan area. The SCA concludes that further engagement with boroughs will follow to work in partnership to develop proposals for related potential connections and area improvements.

Bus Services

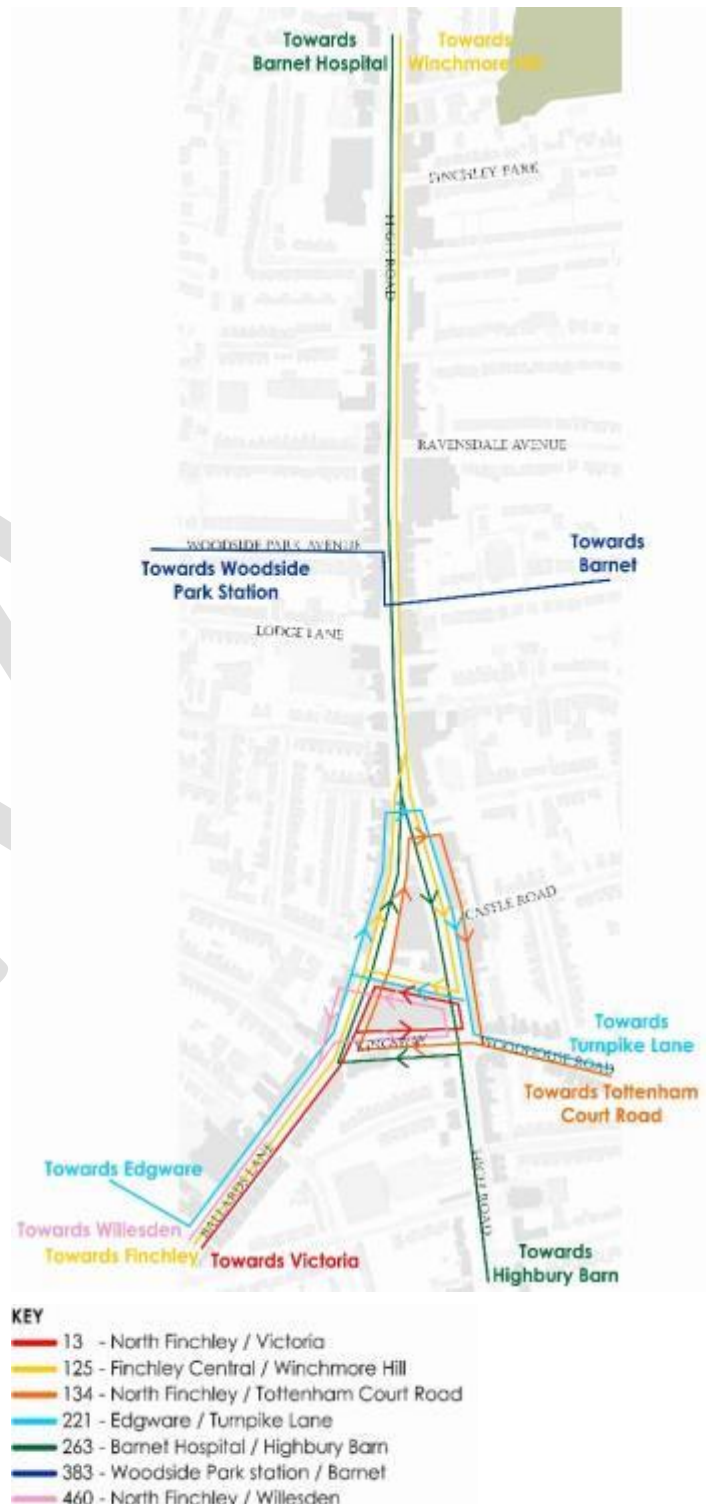
6.8 The area is well served by buses with a variety of services, seven in all, providing strong coverage to all compass points. The generous carriageway dimensions are generally favourable to bus movement, although the one-way gyratory is an issue for bus accessibility and minimising bus journey times.

6.9

6.10 Bus service operational considerations along with local traffic management and access issues have led to a somewhat convoluted bus access and contra-flow access arrangement nearby the bus station and layover area that does little for service legibility and bus profile. The bus station is somewhat hidden from view though offering passengers shelter and real-time service information.

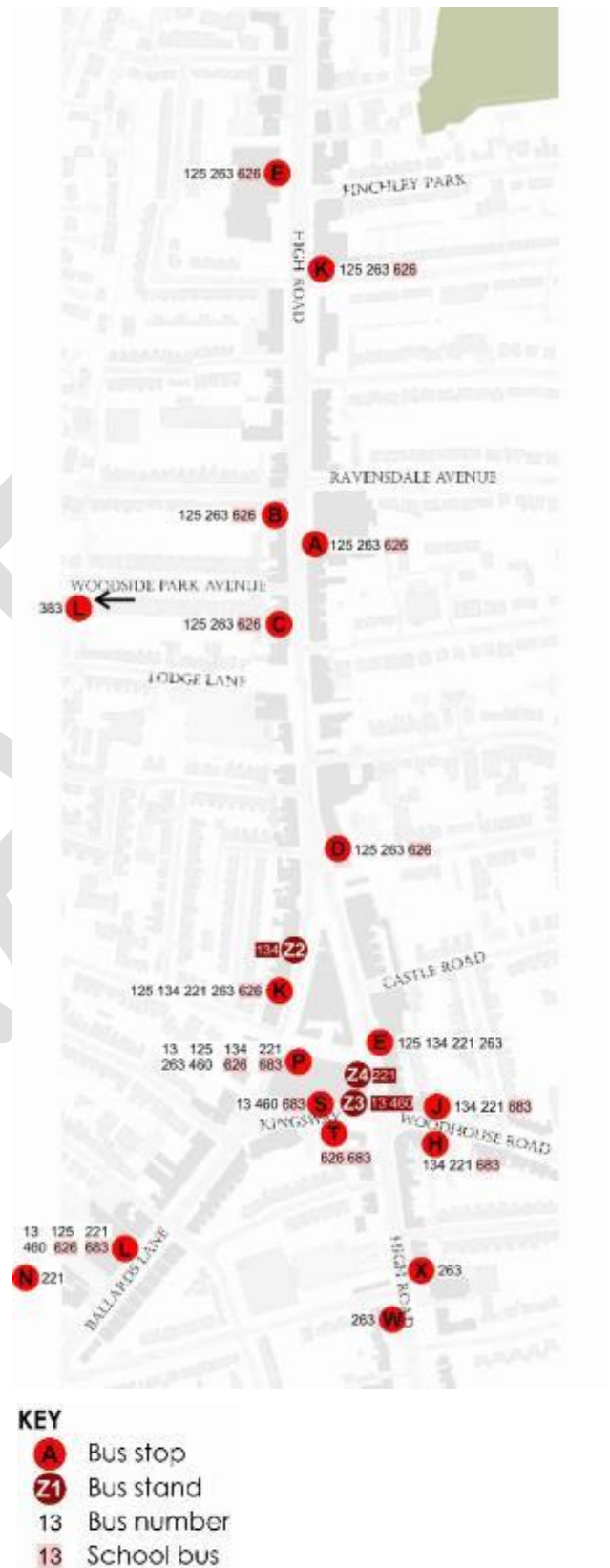
Issues:

- Area well served by bus routes and services
- Carriageway width favourable for efficient bus movement
- Bus garage, layover and turn-round via gyratory useful locally and strategically to operators
- Poor bus service and route legibility
- Buses laying-over occupy road space and impact upon streetscape
- Low-profile and unwelcoming bus station environment
- Tension between bus movements and pedestrians in bus station vicinity
- Contraflow traffic management awkward in vicinity of bus station



Opportunities:

- Improve signing and profile for bus services
- Improve bus service and bus station profile
- Improve bus service legibility - convert gyratory to two-way operation
- Re-balance relationship between bus operational needs with bus user experience
- Improve bus passenger facilities on and off-street
- Ensure all bus stops are accessible
- Provide real-time information more widely



Rail Services

- 6.11 The town centre is fortunate to have a direct rail link to central London and all points in-between via two stations on the Northern line, Woodside Park and West Finchley. Although both entail a 10-15 minute walk, the links are pleasant, tree-lined with good natural surveillance. There is however little to suggest to High Street visitors that this service is available as a sustainable travel option, with no service profile or information given.



Woodside Park Station Entrance

- 6.12 New Southgate station is the nearest national rail service to North Finchley (about 18 mins by bus). Trains from New Southgate serve Moorgate. A new Crossrail 2 station is proposed at New Southgate. Crossrail 2 will improve access into and across London but is not expected to be delivered until the 2030s.

- 6.13 Woodside Park offers a 140 space (LUL) car park operated by NCP with all day parking available at £4.20 with season tickets available. Although data is not available at the time of reporting, it is possible that the popular and well-used Lodge Lane car park also accommodates similar long-stay commuter parking, especially given its cheaper tariff at £3.25.



Woodside Park Station Car Parking

Issues:

- Good underground services – direct link to central London two Northern line stations
- Pleasant and good quality walking links to station – both suitable for cyclists
- Sheltered cycle parking storage available at Woodside Park Station, but poorly situated
- Poor sense of town centre arrival and feeling of remoteness from heart of town centre
- 1km / 10min (typical) walk from station(s) to the town centre

Opportunities

- Improve sense of arrival and public realm at station
- Strengthen station profile within the town centre
- Improve station signing and wayfinding to/from town centre

Road Network

- 6.14 The A1000 High Road is, first and foremost a key strategic link and as such carries considerable volumes of through traffic as well as providing for many shorter distance local movements. Although no detailed survey information is available, site observations suggest that congestion is a familiar component of the High Street experience, though seen to clear relatively straightforwardly suggesting local junction arrangements, including traffic signalisation, the gyratory and kerbside 'turbulence' from parking and loading activity may be contributing factors in this and may at least in part, be subject to improvement.
- 6.15 Overall, as mentioned in relation to bus and cyclist movement, the carriageway width and capacity is a favourable element of the town centre's form suggesting considerable scope for road space reallocation in relation to town centre needs for all users, pedestrians, cyclists, buses, parking and loading and streetscape improvement.

Issues:

- Good local and strategic road network access for local people via A1000 High Street
- Wide and high capacity, multi-lane carriageway
- Strategic function of road corridor brings longer-distance road users and behaviours
- Frequent congestion, but seemingly largely local in nature
- Apparent widespread scope for carriageway reallocation to the benefit of non-car users
- Road traffic dominance and related severance impacts
- Apparent under-use of valuable road space asset
- Lengthy road crossing distances

Opportunities

- Improve the town centre setting and environment for non-car users
- Narrow carriageway(s) and widen footways
- Incorporate parking and loading on pedestrian-friendly 'pads'
- Options to introduce two-way working around present gyratory include:
 - Convert Kingsway and High Road two-way system to increase flexibility and minimise vehicle movements
 - Ballards Lane (between Kingsway and Hall Street) as limited vehicle access and pedestrian/cyclist priority.



Traffic at High Road, North Finchley



Traffic at High Road, North Finchley

Parking and Loading

- 6.16 The total town centre off-street car park capacity is approximately 511 publicly available spaces provided principally by the Lodge lane car park at 232 spaces, with another 184 available at the Aldi car park. Other smaller sites at Stanhope Road and Woodhouse Road offer the balance of 95 spaces. All are well-used. As the diagram shows, considerable shoppers customer parking capacity is also provided at Sainsbury's to the north, 156 spaces and at Waitrose to the south, 170 spaces
- 6.17 A considerable proportion of High Street kerbside space is given over to parking and loading, which while highly convenient for users means that roadscape is effectively prioritised away from other uses such as public realm, widening footways and providing for cyclists.
- 6.18 Generally, all types of parking are well-used with little apparent capacity available on or off-street. This is concerning in terms of managing any future growth in parking demand.
- 6.19 A general lack and / or disuse of rear servicing via side roads has led to a general dependence on High Road kerbside space.

Issues:

- Convenient multi-site off-street parking provision
- Convenient on-street retail and business parking on the High Road and Ballard's Lane – mostly under pay and display management
- Lodge Lane particularly convenient as high capacity High Street shopper's car park
- Controlled Parking Zone in operation to manage parking on local streets
- Apparent sub-optimal use of parking provision e.g. longer stay activity to detriment of shorter-stay provision

- Apparent substantial use of present provision both on and off-street limits possible reallocation and constrains development potential
- Side-street off-street car parks not complementary to residential streets
- Further development-related parking demand would pressurise present parking provision.

Opportunities

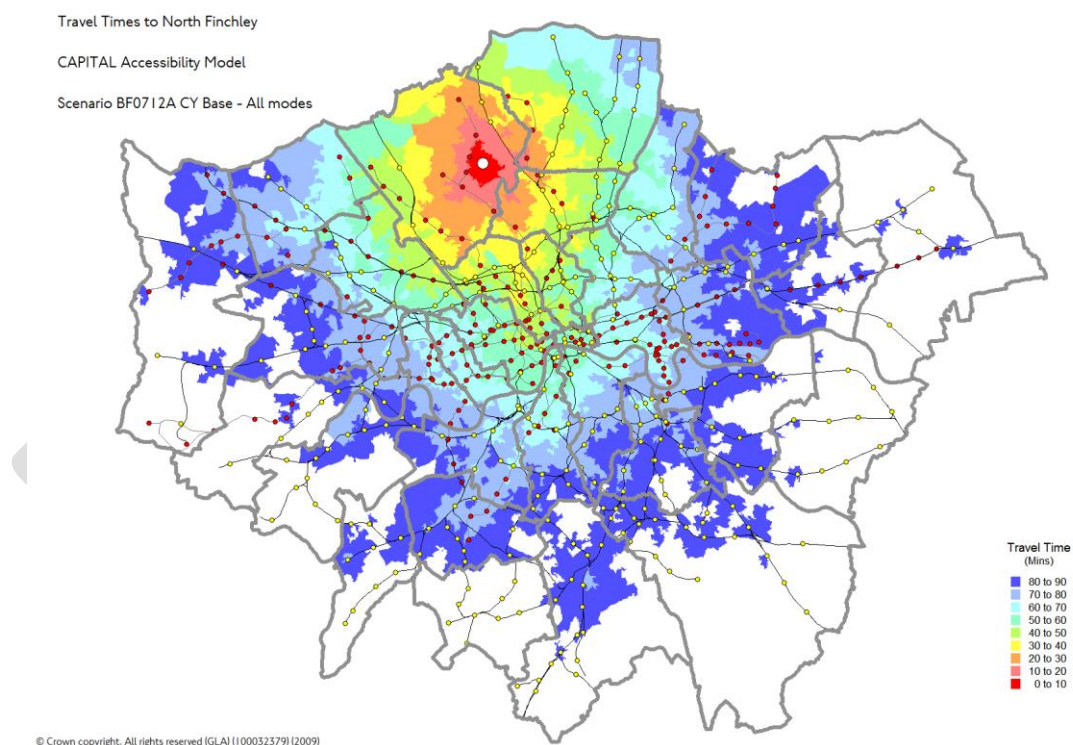
- Inset parking bays i.e.'pads' to maintain parking and provide for increased footway provision
- Rationalise multi-site provision to fewer but larger car parks – possibly to single larger Lodge Lane decked car park
- Rationalise on-street parking to facilitate public realm improvements through increasing turnover, relocation, tariff amendments
- Consider rationalisation of parking through specific town centre Parking Strategy



Accessibility

- 6.20 By combining all transport modes (**Figure 23**), the analysis reveals that North Finchley is a well-connected area. The town centre is accessible across London within a time distance of less than 90 minutes. Only some more remote areas in the outer London have a higher time requirement.
- 6.21 The 30 minutes catchment area covers the majority of North London including locations in Central London.
- 6.22 This high accessibility increases the potential of footfall growth; however it also increases the potential of retail leakages. Therefore, it is essential to plan for supplementary uses to the surrounding key destinations and focus on fulfilling the daily needs of the adjacent residential areas.

Figure 23: Travel time to North Finchley

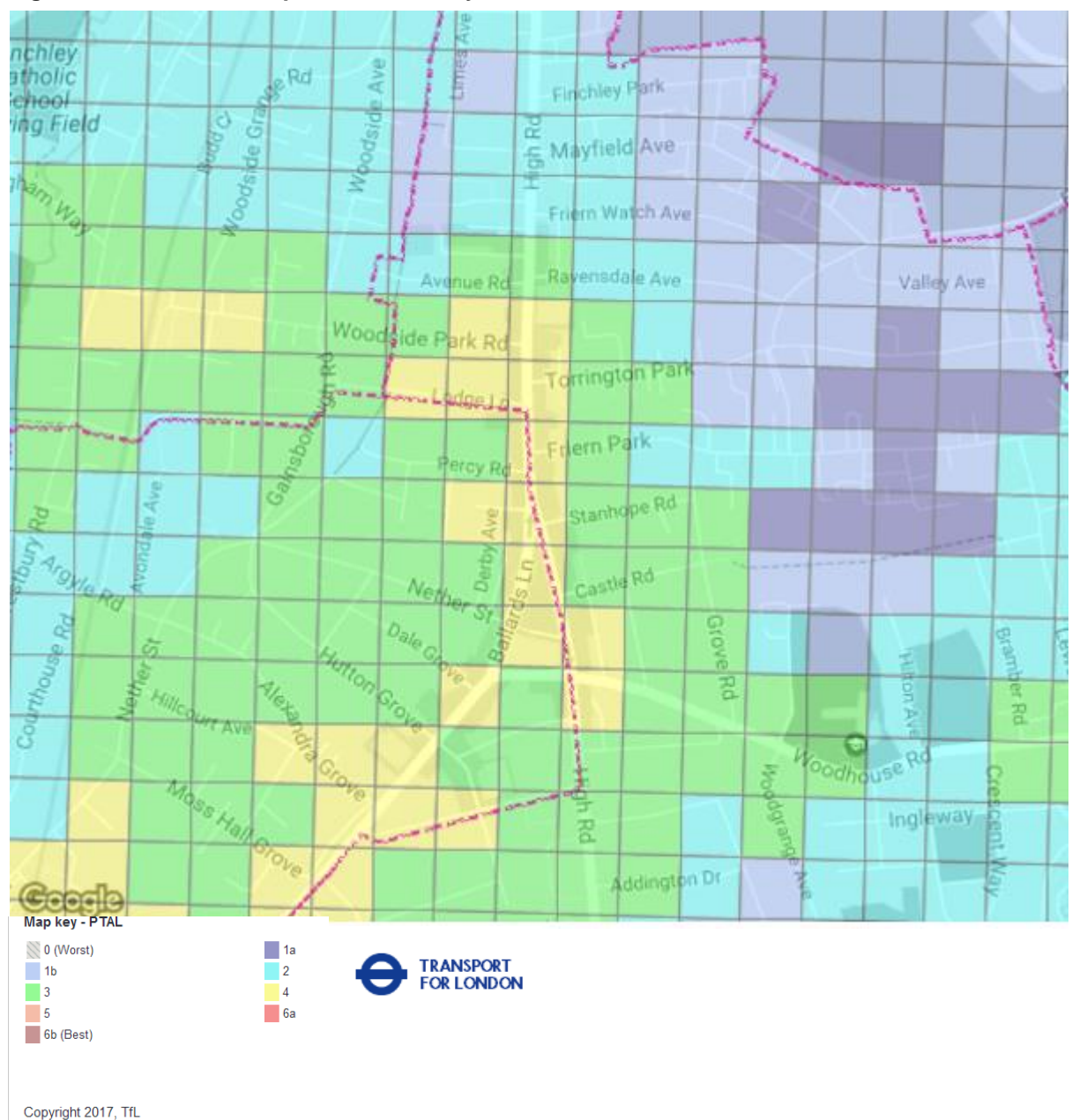


- 6.23 Transport for London publishes the public transport accessibility level (PTAL) as an index to assess the access level of geographical areas to public transport. The approach hinges on the distance from any point to the nearest public transport stop and service frequency at those stops.

6.24 The result is a grade from 1–6 (including sub-divisions 1a, 1b, 6a and 6b), where a PTAL of 1a indicates extremely poor access to the location by public transport, and a PTAL of 6b indicates excellent access by public transport.

6.25 The following map presents the PTAL of the study area as published in TfL WebCAT website¹¹. The area overall falls within a range of 2 to 4 PTAL and it is considered in general good.

Figure 24: Public Transport Accessibility Level



¹¹ [https://tfl.gov.uk/info-for/urban-planning-and-construction/planning-with-webcat/webcat?scenario=2021%20\(Forecast\)&Type=PTAL](https://tfl.gov.uk/info-for/urban-planning-and-construction/planning-with-webcat/webcat?scenario=2021%20(Forecast)&Type=PTAL)

Transport Analysis Summary

- The masterplan area is subject to substantial levels of 'through' and local traffic which lend the area several direct and negative impacts including severance, noise and a general degradation in the quality of the street environment.
- In general, the area is arranged in favour of accommodating that traffic and related parking and servicing with often very wide carriageways, the large and triangular Tally Ho gyratory, and frequent on-street parking provision.
- Off-street parking provision is available at several locations and appears to be providing satisfactorily for present parking demand (to be determined by future related parking surveys).
- Various observed parking place observations and behaviours would suggest that better use may be made of the existing on-street and off-street supply in terms of location, parking space turnover and capacity to better balance parking demand and supply.
- Footway provision for pedestrians is variable along the corridor in terms of width and quality, though road crossings are generally poor, particularly in requiring pedestrians to cross wide carriageways with the attendant inconvenience and delays that entails.
- There is little specific provision made for cyclists whether in terms of cycle parking, route signing, road crossing facilities or cycle lanes on this strategic route.
- Bus services make use of the triangular gyratory to terminate, turn and provide operational bus layover which, although helpful in supporting this important sustainable travel mode, is generally unhelpful to the streetscape under the current arrangement.
- Alternative operational arrangements, minimising gyratory dependency and use, may assist in reducing bus service journey distance and benefit service reliability.
- The present bus station is positive in providing shelter and service information but effectively 'hides' those services from the town centre and re-provision at a location(s) on-street may help improve bus service profile, access and usage.
- The masterplan area is well provided for with a direct Northern line rail link to central London via two stations. Although both are a 10-20 minute walk for most from the town centre, the links are of good quality with good natural surveillance. However, the station's High Road profile is poor with little encouragement given to those on the High Road to use them.

7 PROPERTY MARKET REVIEW

- 7.1 This section assesses the key dynamics influencing the residential, retail and office markets in North Finchley.

Residential Market

National Market Overview

- 7.1 House prices have continued to grow at a strong level since autumn 2013 but there are signs that this continued rate of growth is beginning to ease. The Land Registry House Price Index (HPI) reported in February 2017 that the annual rate of growth of house prices in the UK was 5.8%, and the monthly rate of change was 0.6%.
- 7.2 The slowing down of the residential market has been largely as a result of the decision to leave the European Union (Brexit) in June 2016, with the uncertainty surrounding the form and nature of the UK trading position with Europe and the rest of the World. The triggering of Article 50 and the presidency of Donald Trump in the USA has increased the uncertainty to global stock markets generally. In the UK, plc housebuilders have recovered from initial falls in share prices following the referendum result, with several of them reporting increased profits and robust underlying demand in the market.

Local Market

- 7.3 Zoopla has reported that most of the sales in North Finchley (N12) over the past year (May 2016-2017) were flats which on average sold for £399,303. Terraced properties had an average sale price of £695,470, semi-detached properties averaged £746,990, and detached properties averaged £957,812. Overall, average house prices in N12 were £565,094.
- 7.4 According to Zoopla, current average house prices in N12 as at May 2017 stood at £615,186, which is a 3.17% increase on May 2016 prices. This compares to London as a whole with average house prices of £668,170, which equates to an annual increase of 1.57%.

Residential Sales

- 7.5 To determine housing values achievable, we have analysed a number of key developments in the North Finchley area including new build and recently developed schemes.

Hutton Grove Development, Hutton Grove (N12)

- 7.6 Is a scheme of 11 duplex apartments (10 x one bedroom flats and 1 x 2 bedroom flats) by developer Hutton Developments Ltd. The scheme is currently being marketed by Adams and Hayes with the 1 bedroom units available for between £329,500-£375,000, which equates to

between £683 and £695 per sq .ft. The two bedroom unit is available for £499,950, which equates to £611 per sq.ft.

Imperial Square, High Road (N12)

- 7.7 Imperial Square is a scheme of 11 x three and four bedroom houses and 84 x one, two and three bedroom flats. The most recent sale prices achieved within the scheme were as follows:

No. of Beds	Floor	Price	Size	psf
1	1	£360,000 (Feb 2016)	700	£514
1	1	£495,000 (Jan 2016)	917	£540
2	1	£525,000 (Dec 2015)	960	£547
3	1	£625,000 (Feb 2016)	1184	£528
3	House	£995,000 (Mar 2015)	No info	
3	House	£975,000 (Mar 2015)	No info	

Trinity Square, High Road (N12)

- 7.8 Trinity House is a scheme of 60 flats developed by Catalyst Housing, and 100% of the units are shared ownership. According to Catalyst the full market value of units within Phase II are considered as follows:

- 1 bedroom flats = £365,000, equating to £673 per sq.ft.
- 2 bedroom flats = £525,000, equating to £647 per sq.ft.
- 3 bedroom flats = £677,500, equating to £732 per sq.ft.

Totteridge Place development, High Road (N20)

- 7.9 A new development of 100 flats and 24 town houses which is expected to complete in 2019, with 19 units sold. A mix of 1-3 bed flats/penthouses. The scheme is split across 3 blocks ranging from 3-6storeys. The development is to a high specification. The agent confirmed that prices do not vary considerably from floor to floor for the units. Prices achieved are as follows:

- 1 bedroom flats – circa 500 sq ft have sold for between £409,000-450,000 (£859 per sq.ft.)
- 2 bedroom flats – circa 720 sq ft and have sold for approximately £600,000 (£833 per sq.ft.)
- 3 bedroom flats – circa 1,100 sq ft and have sold for £720,000 (£655 per sq.ft.)
- 3 bed Penthouses – circa 1,300 sq ft and have sold for between £880,000-£910,000 (£677-700 per sq.ft.)

Gateway House Development, Regents Park Road (N3)

- 7.10 The below are the figures achieved for exchanged units at Gateway House. They will complete July/August time when the construction finishes. In total there are 77 units with a mix of 1 and 2 beds. The units were put on the market in February 2017 and since then 69 units have sold.

No. of Beds	Floor	Price	Size	psf
1	5th	£419,205	539	£778
1	7 th	£475,000	548	£867
2	1st	£519,950	651	£799
2	1st	£615,000	785	£783

- 7.11 1 bed flats sold from £390,000 - £475,000. The development is near Central Finchley station and built to a high specification.

Sale Rates

- 7.12 A review of the recent deals from Molior shows that sales rates are circa 6-8 per month, although a number of schemes show significant off-plan transactions.

Residential Lettings

- 7.13 We have reviewed recent lettings for new or modern flatted accommodation on the market in North Finchley. This is set out in the table below.

No. of Beds	Address	PCM	Size	
1	Vinny Court, High Road, N12 9RW	£1,192	442	New build, modern spec, Unfurnished
1	Vinny Court, High Road, N12 9RW	£1,148	435	New build, modern spec, unfurnished
1	High Road, North Finchley, N12	£1,100	N/A	Newly converted block of 1 and 2 bed flats. Medium Spec.
2	Whoston Lodge, Holden Avenue, Woodside Park N15 6AA	£1,564	n/a	New (ish) building of flats. Patio area. Medium Spec.
2	Friern Park, North Finchley	£1,599	1205	New build, high spec, Parking
2	Friern Park, North Finchley	£1,750	1030	New build, high spec, Parking, Balcony

- 7.14 Local agents were able to confirm that 1 bedroom properties in the North Finchley let for between, £1,100 - £1,300 pcm and 2 bedroom properties let for £1,450 - £1,600 pcm.

Retail & Leisure Market

National Market Overview

- 7.15 The retail market has been undergoing major structural change and this transformation continues at a rapid rate with online, mobile and digital technologies creating new platforms for retailers to sell to consumers. In the past five years there has been considerable change in the convenience food sector, with the drive for smaller store formats in increasingly more locations, and the comparison goods sector is now experiencing a similar structural change. The British Retail Consortium's recent paper 'The Changing Face of Retail' suggests that the number of stores is likely to decrease by circa one-third between 2010 and 2020 (likely to happen in more secondary retail locations). In April 2017, BRC reported that online sales represented 22% of the non-food market in the UK.
- 7.16 The food and beverage market is one area that is experiencing continued growth and activity. Figures from Local Data Company indicate that turnover in the UK restaurant industry is up by 40%, with a rise from £15.5bn to £21.6bn. The number of restaurants in the UK has increased by 20% in the last five years (an increase of 14,000 new restaurants).

Local Market

- 7.17 North Finchley is classified as a District Centre with circa 400,000 sq.ft. of town centre commercial floorspace. Key convenience retailers within the town centre, including Sainsbury's with a store of circa 50,000 sq.ft. GIA, Waitrose of circa 42,000 sq.ft. GIA and Aldi of circa 19,000 sq.ft. GIA and Tesco Express of circa 5,000 sq.ft. NIA. Beyond North Finchley, a Tesco food store is found at Central Finchley. The Waitrose is located at the southern end of the town centre and fairly remote from the heart.
- 7.18 In terms of comparison retail, the town centre is limited in its offer, due principally to the larger offers in nearby centres and because the existing retail units are under-sized in period buildings (1900-1930s), and do not meet modern requirements.
- 7.19 AS noted elsewhere, the food and beverage offer in the town centre has more independents, with Turkish, Indian, Italian, Japanese, Middle Eastern and Chinese restaurants. Most of the branded offer is at the coffee shop and fast food end of the market, with Costa Coffee, Caffè Nero, Starbucks, McDonalds etc. represented. There is a limited upper market brands that you would expect to see with the affluence in the resident population.
- 7.20 The Arts Depot is a key cultural/entertainment hub for the town centre, with more to be done to enhance its setting, together with introducing other night-time economy anchors such as an art-

house cinema. The nearest cinema to North Finchley is located at the High Road to the south (Vue Cinema plus Hollywood Bowl).

Rents

- 7.21 A local agent confirmed that prime rents within the town centre are around £65- £75 ITZA. The comparables as set out in the table below show lower rents reflecting the bottom end of the High Road/Ballards Lane.

Address	Size	Rent	ITZA	Lease terms/comments
345 Ballards, Lane	660	£22,000	£49.32	10 yr lease with a break at 5 years. Months 4 and 5 given as rent free
349 Ballards Lane	1044	£21,000 (April 2016)	£47.38	10 yr lease Break option in the 5 th yr
692 High Road, N12 9PY _e	1235	£27,000 (asking)	£51.07	Not available

Incentives

- 7.22 Normally we would expect new retail units to command a rent free period of 9-12 months, depending on the quality of the tenant.

Investment Yields

- 7.23 Data on investment yields from sales the most recent sales include 832-834 High Road, which was sold in May 2016 for £3.11m, with a current rent roll of circa £149,000. The net initial yield was 4.79% reflecting the strong covenant strength of the tenants – William Hill and TSB.

Office market

National Market Overview

- 7.24 Optimism in the office market has returned in recent years, as the national economy has stabilised. The IPD UK Annual Property Index for 2015 shows that total returns for offices was at 17.7%. This is well above the annualised 5 year average of 13.4% and shows that confidence has returned, especially in the established market locations. Commentators report that the London market is seeing an upturn in transaction levels following a sharp fall in annual take-up during 2016. In smaller centres, the Permitted Development Rights from B1a offices to C3 residential has reduced the stock of offices generally and taken the poorer quality stock out of the market, providing renewed investment focus in some locations.

Local Market

- 7.25 The office stock in North Finchley is very limited and reflects the status of the town centre as a District Centre and not a major centre of employment. There are pockets of offices within the centre, including Global House and Rowlandson House (serviced offices) at Ballards Lane, Friern Park (serviced offices), Solar House (915 High Road – serviced offices), Finchley House Business Centre (serviced offices) and Balfour House. At Balfour House, quoting rents are £17.50-£21.50 per sq.ft. for office suites. Vacancy rates are understood to be low.
- 7.26 Part of Solar House has Permitted Development Rights from B1a offices to C3 residential. In addition, Finchley House Business Centre has also secured Permitted Development Rights from B1a offices to C3 residential.

Property summary

- Nationally, house prices have continued to grow at a strong level since autumn 2013 but there are signs that this continued rate of growth is beginning to ease.
- Most of the sales in North Finchley (N12) over the past year (May 2016-2017) were flats which on average sold for £399,303. Schemes coming to the market are emphasising flats of 1-3 beds over townhouses.
- Average house prices in N12 as at May 2017 stood at £615,186, which is a 3.17% increase on May 2016 prices. This compares to London as a whole with average house prices of £668,170, which equates to an annual increase of 1.57%.
- Nationally the retail market continues to transform with online, mobile and digital technologies creating new platforms for retailers to sell. The number of comparison stores is likely to decrease in the future with high streets performing an increasing leisure and social function.
- North Finchley's convenience offer is strong but more limited in comparison, due principally to the larger offers in nearby centres and because the existing retail units are under-sized in period buildings (1900-1930s), and do not meet modern requirements.
- The office stock in North Finchley is limited. There are pockets of serviced offices within the centre, some of which offer relatively cheap space. Generally office vacancies are understood to be low indicating local demand. Permitted Development Rights have reduced the available space in recent years as B1a offices are converted to C3 residential.

8 BRINGING THE EVIDENCE TOGETHER

- 8.1 This section summarises the evidence and provides a set of emerging strengths, weaknesses, opportunities and threats (SWOT) that will support the vision and objectives of the emerging SPD.

Town Centre Performance

- 8.2 North Finchley is a well-established town centre, designated as a District Centre in the London Plan and Barnet's Local Plan with a relatively low vacancy rate. The local population has an above average representation of higher band socio economic groups and is indicative of a strong spend profile. Whilst the centre has a good range of convenience retail there is a relatively limited one for comparison goods.
- 8.3 There is potential for the town centre to play a stronger role in fulfilling the comparison retail requirements of its surrounding residential areas both enhancing the diversity of premium national brands as well as developing a range of higher quality independents. In part this will need to be fulfilled through improvements to the building stock to attract new occupiers as well as wider improvements to public realm. In addition there is potential to strengthen the centre's position with regards to the evening economy. There is a good basis to develop the evening economy of the town centre considering the presence of the Arts Depot and variety of independent restaurants in the area.

Property

- 8.4 North Finchley is classified as a District Centre with circa 400,000 sq.ft. of town centre commercial floorspace including a strong range of food retailers. In terms of comparison retail, the town centre is limited in its offer, due in part to the larger offers of competing accessible centres, and because typically retail units are under-sized in period buildings (1900-1930s), and do not meet modern requirements and accordingly a change in stock is likely to bring new market entrants.
- 8.5 The food and beverage offer in the town centre has a range of independents. Most of the branded offer is at the coffee shop and fast food end of the market. There is a limited upper market brands that you would expect to see with the affluence in the resident population and potential to introduce entrants with enhanced public realm and new premises.
- 8.6 The office stock in North Finchley is limited and reflects the status of the town centre as a District Centre and not a major centre of employment. There are pockets of offices within the centre, however Permitted Development Rights have taken effect including at Solar House and Finchley House Business.

- 8.7 Most of the residential sales in North Finchley (N12) over the past year (May 2016-2017) were flats. Current average house prices in N12 as at May 2017 stood at £615,186, which is a 3.17% increase on May 2016 prices. This is comparable to London as a whole with average house prices of £668,170, from an annual increase of 1.57%.

Spatial Analysis

- 8.8 The majority of the town centre along the High Road is characterised by reasonably well-maintained 3-storey Victorian and Edwardian parades. The historic fabric is to a large extent preserved and contributes to the local character and the sense of place. The southern end of the centre includes a greater mix of build types including modern and an influence of 1930s, the Tally Ho Triangle and west side in particular having a weaker aesthetic. Secondary streets off the High Road provide links to east and west, which makes the town centre very well connected to surrounding neighbourhoods. The Arts Depot development is the tallest building in the town centre rising to 14 storeys.
- 8.9 The analysis suggests that currently the town centre lacks environmental homogeneity. It is split mainly across three areas (i.e. north, central and south of which the latter two are more functional) with different offers, environment, and sense of safety. In particular the south area, which includes Tally Ho Triangle and the surrounding parades at Ballards Lane, High Road and Kingsland, is of poorer quality public realm and provides an opportunity for design and planning interventions in order to create a more welcoming and safe environment.
- 8.10 A good mix of ground floor uses is one of the factors for the success of the town centre, such as food stores, smaller retail, financial and community servicing, bars/restaurants, workspaces, and some community uses. However shop front quality varies and is poor and inconsistent in places.

Transport and Movement

- 8.11 The Road Network is a dominant element of the town centre. This creates both advantages including a good road network access for local people via A1000 High Street as well as strategic through travel, however this does lead to a dominating road experience. There is potential to widen footways and consider a reorientation of the traffic flow to convert Kingsway and High Road two-way system to increase flexibility and minimise vehicle movements and limit vehicle access along Ballards Lane.
- 8.12 The current cycle access to North Finchley is poor with no dedicated north-south cycle link and a lack of safe and secure cycle parking storage.

- 8.13 The area is well served by buses with a carriageway width conducive to efficient bus movement and a bus garage, layover and turn-round gyratory useful locally and strategically to operators. However, buses laying-over occupy road space and impact upon streetscape, the bus station environment unwelcoming and there is an awkward contraflow traffic management awkward in the vicinity of the bus station.
- 8.14 The total car park capacity is around 400 spaces. There are ten car parks distributed across the town centre. This includes convenient multi-site parking provision including on street and Lodge Lane main car park. A review of parking can consider rationalising multi-site provision to fewer but larger car parks to release development opportunities.

SWOT Analysis

- 8.15 The following sections summarises the analysis of North Finchley town centre's current situation (Strengths and Weaknesses) as well as the opportunities and threats rising from the wider socioeconomic context and dynamics.

Strengths

- S 1.** **Largely affluent residential suburb:** The town centre is located in the heart of a relatively wealthy suburban residential area. The households include established and young families and there is anticipated to be an increasing residential market for young professionals. This provides a platform for increased patronage that can be attracted to the study area as key daily users or weekend visitors.
- S 2.** **Caters for convenience needs:** there is a good range of food stores in the area, with the major brands represented at the discount (Aldi) and premium (Waitrose) ends of the spectrum.
- S 3.** **Good provision of open spaces and schools** in the surrounding area: This reflects the household composition of the area.
- S 4.** **Good London wide accessibility:** The area is accessible from the majority of North London and Central locations within 30 minutes. The overall public transport accessibility ranges between 2 and 4 PTAL. This accessibility increases the potential of footfall growth; however it also increases the potential of retail leakage. This competition reinforces the need to strengthen the local offer.
- S 5.** **Good parking provision** but disaggregated in small car parks – there is potential to reconsider uses through a revised parking strategy.
- S 6.** **Growing evening economy:** There is a range of independent restaurants and a variety of coffee shops brands as well as newer entrants including the Bohemia pub. However the area has not yet generally attracted higher end or recognised multiple brands of the food and beverage industry.
- S 7.** **Low vacancy rate** and a healthy town centre: 7% vacancy rate, below the London wide equivalent.
- S 8.** **Cultural Hub:** The Arts Depot provides modern cultural facilities and it is the only hub of this nature and scale across Barnet. However the neighbouring uses (i.e. Bus Depot and south edge of the Tally Ho Triangle), the design of the surrounding blocks; the associated public realm, and the lack of safety, in general, that the visitor feels walking around the south part of the town centre are all factors that affect the attractiveness and potential footfall capture of the Arts Depot.

- S 9.** **Architectural Points of Interest across the building stock:** There is a variety of architecture in the building stock. Some buildings have an architectural interest and their restoration would benefit environment as well as in the visitors' perception of the area.
- S 10.** **Increase in residential development:** Indicating desirability as a place to live for both families and young professionals

Weaknesses

- W 1.** **Retail offer not aligned to users' profile:** There is appears to be a degree of mismatch between the potential core town centre catchment and users and the retail offer of the centre. This provides a key opportunity for enhancing the town centre's health and vibrancy
- W 2.** **Limited comparison retail offer**
- W 3.** **Limited offer of high brand or multiple restaurants and eateries.**
- W 4.** The **large length of the linear high street**; it restricts the ability to establish an integrated identity and retail circuits across the town centre and dilutes the concentration of activity
- W 5.** There is **not a clear centre point** acting as the "heart of the town centre". The current landmark is the block of the Arts Depot; bus services and the adjacent tower, however the primary frontage is to the north of Tally Ho, reflected in the quality of brands (River Island, Waterstones and coffee multiples).
- W 6.** Lack of distinctive **gateways** (particularly at the north).
- W 7.** **Poor public realm** across the majority of the linear alignment. The current public realm is not pedestrian friendly particularly around the gyratory (although there are locations particularly in the north parts where the pavement is wide). There is lack of green space and planting.
- W 8.** The design of **shop fronts** is inconsistent and poor in some instances.
- W 9.** There are **traffic issues** – monitored through a wide range of the day – and not only during the peak hours.
- W 10.** There is a **dominance of the road network** and resistance of walkability across the town centre.
- W 11.** **Poor pedestrian crossings.** There are particular points where identifiable safe crossings for the pedestrians are lacking at desire points.
- W 12.** **No cycling facilities** including lanes and parking spaces.
- W 13.** **Busy and noisy environment** on the High Road
- W 14.** **Not clear character/identity.** There is perception sense that the town centre grew organically along the stretch of the A1000 leading to clusters of retail units at the north and south of the study area which are not integrated to the rest of the town centre, diluting the offer.
- W 15.** **North – South division:** there is a distinctive division between the wider Tally Ho Triangle area the rest of the town centre. This south part tends towards discount brands and independents at the lower end of the comparison range. In contrast the north of the triangle has a better variety and quality of units.
- W 16.** **Contradiction to the surrounding environment.** The majority of the perpendicular streets to the town centre have tree plantation, wide pavements, clear environment and the sense of safety. In contrast the town centre is noisier with lack of green spaces and trees
- W 17.** Diverse and widespread ownerships that understood in some instances to be **absentee landlords** less likely to invest in and maintain the stock.

Opportunities

- O 1.** **Re-emphasise the character** of the area and provide a more distinctive identity. Building upon the existing cultural and evening economy to foster more activities and create a clear cultural hub in south parts of the town centre
- O 2.** Improve **public realm** across the town centre particularly around the Tally Ho Triangle to enhance the area's attractiveness
- O 3.** Improve **walkability** across the town centre by reducing car dominance
- O 4.** **Council-owned land:** the council's assets including car parks have the potential to support growth and supplement the facilities of the town centre

- 5. Other underused/underdeveloped sites with potential for redevelopment
- 6. New residential schemes – increasing households and footfall to the area
- 7. Town centres in proximity – create supplementary relationships
- 8. Consider redevelopment opportunities across the town centre to enhance the accommodation for retailers including larger format modern units to attract a new retail offer
- 9. Growing evening economy –take advantage of an increasing young professional population and ensure accommodation for a range of occupiers, particularly at the cultural hub at the south end of the centre
- 10. Generally supportive property market in terms of demand and values.
- 11. Build on the existing socio-economic profile and attract more aspirational residents to underpin local economy
- 12. Apparent “market gaps” such as Food and beverage, commercial leisure, comparison and convenience retail, residential typologies (owner occupation, private rented)
- 13. Opportunity to build on focal point of Art Depot and redevelopment of adjoining premises in Tally Ho Triangle (i.e. Rex House and Balfour House)
Improve the overall environment of the town centre retail with interventions to improve frontages, public realm and the overall environment of the town centre – to make it a welcoming environment for families

Threats

- T 1 Competitive town centres in Proximity such as Brent Cross Shopping Centre (within 4miles or 15min driving), Edgware (6 miles – 20min driving) and Wood Green
- T 2 Status quo or decline of the southern end of the centre
- T 3 An increase vacancy rates
- T 4 Traffic dominance & car parking as a blight on pedestrian experience
- T 5 Increasing leakage of retail/leisure expenditure
- T 6 Declining public realm quality
- T 7 Decline of retail/leisure offer in qualitative terms
- T 8 Increase in betting shops, charity shops and pay day loans
- T 9 Competition from out of town retail and leisure
- T 10 Increased level of conversion of offices to residential through PD rights giving rise to poor quality residential accommodation
- T 11 Competition from out of town retail and leisure

APPENDIX A: Relevant Policy Requirements – Non exhaustive list

LONDON PLAN
Policy 2.6 Outer London Vision and Strategy
Policy 2.7 Outer London: economy
Policy 2.8 Outer London: transport
Policy 2.15 Town centres
Policy 3.1 Ensuring equal life chances for all
Policy 3.2 Improving health and addressing health inequalities
Policy 3.3 Increasing housing supply
Policy 3.4 Optimising housing potential
Policy 3.5 Quality and design of housing developments
Policy 3.6 Children and young people's play and informal recreation facilities
Policy 3.7 Large residential developments
Policy 3.8 Housing choice
Policy 3.9 Mixed and balanced communities
Policy 3.10 Definition of affordable housing
Policy 3.11 Affordable housing targets
Policy 3.12 Negotiating affordable housing on individual private residential and mixed use schemes
Policy 3.13 Affordable housing thresholds
Policy 3.14 Existing housing
Policy 3.15 Co-ordination of housing development and investment
Policy 3.16 Protection and enhancement of social infrastructure
Policy 4.1 Developing London's economy
Policy 4.2 Offices
Policy 4.3 Mixed use development and offices
Policy 4.4 Managing industrial land and premises
Policy 4.5 London's visitor infrastructure
Policy 4.6 Support for and enhancement of arts, culture, sport and entertainment
Policy 4.7 Retail and town centre development
Policy 4.8 Supporting a successful and diverse retail sector and related facilities and services
Policy 4.9 Small shops
Policy 4.10 New and emerging economic sectors
Policy 4.11 Encouraging a connected economy
Policy 4.12 Improving opportunities for all
Policy 6.2 Providing public transport capacity and safeguarding land for transport
Policy 6.3 Assessing effects of development on transport capacity
Policy 6.4 Enhancing London's transport connectivity
Policy 6.7 Better streets and surface transport
Policy 6.9 Cycling
Policy 6.10 Walking
Policy 6.11 Smoothing traffic flow and tackling congestion
Policy 6.12 Road network capacity
Policy 6.13 Parking
Policy 7.1 Lifetime neighbourhoods
Policy 7.2 An inclusive environment
Policy 7.3 Designing out crime

Policy 7.4 Local character
Policy 7.5 Public realm
Policy 7.6 Architecture
Policy 7.7 Location and design of tall and large buildings
Policy 7.8 Heritage assets and archaeology
Policy 7.9 Heritage-led regeneration
Policy 7.13 Safety, security and resilience to emergency
Policy 7.14 Improving air quality
Policy 7.15 Reducing and managing noise, improving and enhancing the acoustic environment and promoting appropriate soundscapes
Policy 7.21 Trees and woodlands
Policy 8.1 Implementation
Policy 8.2 Planning obligations
Policy 8.3 Community infrastructure levy
Policy 8.4 Monitoring and review
CORE STRATEGY
Policy CS NPPF – Presumption in favour of sustainable development
Policy CS1 – Barnet’s place shaping strategy – protection, enhancement and consolidated growth – The three Strands Approach
Policy CS3: Distribution of growth in meeting housing aspirations
Policy CS4: Providing quality homes and housing choice in Barnet
Policy CS5: Protecting and enhancing Barnet’s character to create high quality places
Policy CS6: Promoting Barnet’s town centres
Policy CS7: Enhancing and protecting Barnet’s open spaces
Policy CS8: Promoting a strong and prosperous Barnet
Policy CS9: Providing safe, effective and efficient travel
Policy CS10: Enabling inclusive and integrated community facilities and uses
Policy CS11: Improving health and well-being in Barnet
Policy CS12: Making Barnet a safer place
Policy CS13: Ensuring the efficient use of natural resources
Policy CS14: Dealing with our waste
Policy CS15: Delivering the Core Strategy
BARNET’S LOCAL PLAN – DEVELOPMENT MANAGEMENT POLICIES
Policy DM01: Protecting Barnet’s character and amenity
Policy DM02: Development standards
Policy DM03: Accessibility and inclusive design
Policy DM04: Environmental considerations for development
Policy DM05: Tall buildings
Policy DM06: Barnet’s heritage and conservation
Policy DM07: Protecting housing in Barnet
Policy DM08: Ensuring a variety of sizes of new homes to meet housing need
Policy DM09: Specialist housing – Houses in Multiple Occupation, student accommodation and housing choice for older people
Policy DM10: Affordable housing contributions
Policy DM11: Development principles for Barnet’s town centres
Policy DM12: Maintaining local centres and parades
Policy DM13: Community and education uses
Policy DM14: New and existing employment space

Policy DM15: Green Belt and open spaces
Policy DM16: Biodiversity
Policy DM17: Travel impact and parking standards
Policy DM18: Telecommunications

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