APPENDICES

APPENDIX 1

COMPETING CENTRES

APPENDIX 1A

MARKET SHARE AND TRADE RETENTION

LB BARNET
BOROUGH-WIDE TOWN CENTRES STUDY 2008

TABLE 1

COMPARISON GOODS ALLOCATION 2008

% MARKET SHARE

	RETAIL LOCATION	ZONE 1 %	ZONE 2 %	ZONE 3 %	ZONE 4 %	ZONE 5 %	ZONE 6 %	ZONE 7 %	ZONE 8 %	ZONE 9 %	ZONE 10 %	ZONE 11 %	ZONE 12 %	ZONE 13 %	ZONE 14 %	ZONE 15 %	ZONE 16 %
1	Central London/West End	7.7	5.2	9.7	4.3	8.1	19.1	12.5	3.7	5.2	13.6	5.0	2.9	14.6	3.8	28.5	35.8
2	Watford	2.5	0.6	2.1	1.5	0.9	0.5	0.1	8.5	3.6	0.5	0.6	22.4	0.8	20.6	0.1	0.3
3	Harrow	0.0	0.8	0.0	0.6	0.0	0.0	0.0	1.2	7.4	0.4	3.2	0.0	0.0	14.3	0.6	0.0
4	Enfield Town	1.3	6.5	1.5	0.0	0.0	0.4	0.0	0.4	0.0	0.0	0.5	0.0	16.6	0.2	0.0	0.7
5	Borehamwood	5.6	1.7	0.3	0.5	0.0	0.0	0.0	2.5	0.5	0.0	0.7	31.1	0.5	0.5	0.0	0.0
6	Wood Green	0.7	1.0	6.6	0.3	0.0	2.2	0.0	0.0	0.0	0.0	0.8	0.0	3.7	0.0	0.0	0.2
7	Brent Cross	18.7	16.9	24.2	45.0	39.7	23.8	41.0	33.3	26.0	45.7	43.9	5.3	22.4	20.0	27.4	15.9
8	Edgware	0.4	0.0	0.0	1.6	0.2	0.0	0.3	14.2	10.4	1.2	1.6	0.9	0.0	7.2	0.3	0.5
9	North Finchley	2.9	4.6	13.3	6.3	9.7	5.0	3.9	0.4	1.7	1.0	0.0	0.0	0.8	0.0	0.6	2.1
	SUB-TOTAL	**39.8**	**37.3**	**57.6**	**59.9**	**58.5**	**50.9**	**57.8**	**64.1**	**54.8**	**62.4**	**56.3**	**62.6**	**59.3**	**66.6**	**57.5**	**55.5**
	Other	60.2	62.7	42.4	40.1	41.5	49.1	42.2	35.9	45.2	37.6	43.7	37.4	40.7	33.4	42.5	44.5
	TOTAL	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

Source: Household Survey, September 2008

TABLE 2

COMPARISON GOODS ALLOCATION 2008

SPEND (£)

	RETAIL LOCATION	ZONE 1 (£000)	ZONE 2 (£000)	ZONE 3 (£000)	ZONE 4 (£000)	ZONE 5 (£000)	ZONE 6 (£000)	ZONE 7 (£000)	ZONE 8 (£000)	ZONE 9 (£000)	ZONE 10 (£000)	ZONE 11 (£000)	ZONE 12 (£000)	ZONE 13 (£000)	ZONE 14 (£000)	ZONE 15 (£000)	ZONE 16 (£000)	**TOTAL (£000)**
1	Central London/West End	7,127	5,998	17,158	3,343	6,968	24,646	8,976	4,400	7,452	16,977	6,488	2,852	14,999	4,224	63,417	99,718	**294,744**
2	Watford	2,304	732	3,648	1,142	757	667	108	10,261	5,119	632	806	21,985	848	23,033	333	819	**73,195**
3	Harrow	0	899	0	463	0	0	0	1,450	10,550	485	4,187	0	0	15,949	1,308	0	**35,289**
4	Enfield Town	1,248	7,450	2,628	0	0	467	0	509	0	0	615	0	17,108	244	0	1,981	**32,250**
5	Borehamwood	5,250	1,913	548	388	0	0	0	2,984	749	0	896	30,603	475	518	0	0	**44,326**
6	Wood Green	636	1,187	11,658	231	0	2,785	0	0	0	0	991	0	3,863	0	0	633	**21,985**
7	Brent Cross	17,424	19,462	42,993	35,369	34,325	30,764	29,443	40,031	36,927	56,906	56,788	5,209	23,062	22,340	60,868	44,392	**556,302**
8	Edgware	362	0	0	1,233	140	0	211	17,074	14,716	1,484	2,084	888	0	8,044	714	1,411	**48,360**
9	North Finchley	2,664	5,235	23,693	4,945	8,401	6,444	2,783	435	2,388	1,237	0	0	813	0	1,238	5,821	**66,096**
	SUB-TOTAL	**37,015**	**42,877**	**102,326**	**47,114**	**50,591**	**65,773**	**41,521**	**77,144**	**77,901**	**77,721**	**72,855**	**61,537**	**61,169**	**74,350**	**127,879**	**154,776**	**1,172,548**
	Other	55,984	72,173	75,218	31,551	35,897	63,337	30,317	43,176	64,281	46,862	56,580	36,735	41,915	37,281	94,597	123,853	909,759
	TOTAL	**92,999**	**115,049**	**177,544**	**78,665**	**86,488**	**129,110**	**71,839**	**120,320**	**142,182**	**124,583**	**129,435**	**98,271**	**103,084**	**111,631**	**222,476**	**278,629**	**2,082,307**

APPENDIX 1B

KEY INDICATORS

Competing Centres: Key Indicators

2.1 Javelin Rank		
Centre	**Rank (2007)**	**Change in Rank position 2006**
Central London*	9	↑
Watford	37	↑
Harrow	118	↑
Brent Cross	**140**	↑
Wood Green	146	↓
Enfield	183	↑
North Finchley**	**304**	↓
Edgware	**315**	↑
Borehamwood	812	↓

Source: Venue Score/Javelin 2006
**London, Oxford Street   **London, Finchley*

2.2 Retail Floorspace	
Centre	**sq.m gross**
Central London	1,366,641
Watford	144,678
Wood Green	107,768
Harrow	99,824
Brent Cross	**83,528**
Enfield	57,284
Borehamwood	57,080
Edgware	**17,990**
North Finchley	**10,490**

Source: Goad Category Reports

2.3 Comparison Goods Trade Draw %	
Centre	%
Brent Cross	**26.6**
Central London	14.2
North Finchley	**3.8**
Watford	3.5
Edgware	**2.3**
Borehamwood	2.1
Harrow	1.7
Enfield	1.5
Wood Green	1.1

Source: GVA Grimley Modelling

2.4 Comparison Goods Trade Draw £m	
Centre	**£m**
Brent Cross	**570,348**
Central London	302,970
North Finchley	**81,852**
Watford	75,238
Edgware	**49,710**
Borehamwood	45,563
Harrow	36,274
Enfield	33,150
Wood Green	22,598

Source: GVA Grimley Modelling

Competing Centres: Key Indicators

2.5 Comparison of Prime Retail Yields (% Change)			
Centre	**Jan 05**	**Jan 08**	**Change in rank position**
Central London	5.25	4.25	↓
Brent Cross	**5**	**4.25**	↓
Watford	5.5	5.5	↔
Harrow	6.25	5.75	↓
Enfield	7	5.75	↓
Wood Green	7	5.75	↔
North Finchley*	**7.5**	**6**	↓
Edgware	**10**	**8.5**	↓
Borehamwood	-	-	-

Source: Valuation Office Agency – Property Market Report
**Finchley*

2.6 Comparison of Prime Retail Rents (£ per sq.m)			
Centre	**2005**	**2007**	**Change in rank position**
Central London	4395	5095	↑
Brent Cross	**4575**	**4736**	↑
Watford	3283	3337	↑
Enfield	1561	1615	↑
Harrow	1399	1561	↑
Wood Green	1399	1453	↑
Edgware	**1023**	**1023**	↔
North Finchley	**753**	**753**	↔
Borehamwood	484	484	↔

Source: Colliers In Town Retail Rents 2006

2.7 Retailer Demand Apr 2008	
Centre	**No.**
Watford	78
Brent Cross*	**54**
Central London[1]	53
Harrow	44
Enfield	42
Wood Green	18
Edgware*	**14**
Borehamwood	10
North Finchley*	**7**

*Source: *Focus (August 2008) / **Focus (October 2008)*
[1]Oxford Street & Regent Street, London

2.8 Distance from Brent Cross	
Centre	**Miles (Approximate)**
Brent Cross	**-**
Edgware	**6.6**
Borehamwood	8.1
Harrow	10.2
North Finchley	**11.5**
Watford	12.4
Wood Green	14.1
Central London	15.8
Enfield	17.1

Source: GVA Grimley

APPENDIX 1C

PIPELINE SCHEMES

Competing Centres

Key Town Centre Pipeline Schemes

Central London (West End)

- Full planning permission has been granted for a major scheme on Oxford Street West. The scheme, known as Park House, will create an additional 4,000 sqm net retail floorspace and result in a block of large, well configured units. Demolition is due to begin in early 2008 with completion planned for late 2010, early 2011.
- There are also a number of potential redevelopment sites towards the eastern end of Oxford Street although uncertainty surrounding the Crossrail project is holding up any implementation.
- Crown Estate have proposed major redevelopment of the southern part of Regent Street (including the Regent Palace Hotel) to create an additional 4,300 sqm net retail floorspace and a hotel.

Watford

- Planning permission has been granted for circa 1,020 sqm gross additional retail floorspace as part of the redevelopment of existing units at 132-136 High Street.
- The Council are currently seeking a development partner to undertake a scheme to redevelop Charter Place shopping centre for retail, leisure and community uses.
- There has been pre-application discussion over a residential-led scheme to the rear of Watford Junction Station including some element of office and community uses and a small amount of retail. An application is anticipated toward the end of 2008.

Borehamwood

- There are currently no retail developments in the pipeline.

Harrow

- Tesco have renewed full planning permission consent to extend their exiting store on Station Road to create an additional c.1,020 sqm gross retail floorspace.
- Planning permission has been granted for c.1,580 sqm gross retail floorspace in ground floor units as part of the Bradstowe House development which also includes a health club and residential units.
- Sainsbury's have been refused planning permission for a missed use scheme at Neptune Road involving a 2,787 sqm gross Sainsbury's foodstore and 160 dwellings.
- An application has been submitted for the mixed use redevelopment of the former Post Office and depot on College Road to include approximately 1,020 sqm gross additional retail floorspace.
- Harrow College are looking to develop a new College with a scheme likely to involve an element of retail floorspace although this is likely to be on hold in the present economic climate.

Enfield

- There are currently no retail developments in the pipeline.

Wood Green

- A scheme has been approved to extend to The Mall shopping centre creating c.10,000 sqm net for a new Debenhams department store.
- A residential-led scheme is under construction on Lordship Lane which will include c.1,210 sqm net additional floorspace as well as some leisure provision.

Source: Promis, EGi and Local Authority websites (October 2008)

APPENDIX 1D

BENCHMARKING OF CENTRES

BARNET TOWN CENTRES STUDY - NOVEMBER 2008
BENCHMARKING OF CENTRES

TABLE 1

	Centre	Rank by Javelin (2007)	Rank Score
1	Central London	9	9
2	Watford	37	8
3	Harrow	118	7
4	Brent Cross	140	6
5	Wood Green	146	5
6	Enfield	183	4
7	North Finchley	304	3
8	Edgware	315	2
9	Borehamwood	812	1

BARNET TOWN CENTRES STUDY - NOVEMBER 2008
BENCHMARKING OF CENTRES

TABLE 2

	Centre	Rank by Retail Floorspace sqm gross	Rank Score
1	Central London	1,366,641	9
2	Watford	144,678	8
3	Wood Green	107,768	7
4	Harrow	99,824	6
5	Brent Cross	83,528	5
6	Enfield	57,284	4
7	Borehamwood	57,080	3
8	Edgware	17,990	2
9	North Finchley	10,490	1

BARNET TOWN CENTRES STUDY - NOVEMBER 2008
BENCHMARKING OF CENTRES

TABLE 3

	Centre	Rank by No. of Retailer Requirements	Rank Score
1	Watford	78	9
2	Brent Cross	54	8
3	Central London	53	7
4	Harrow	44	6
5	Enfield	42	5
6	Wood Green	18	4
7	Edgware	14	3
8	Borehamwood	10	2
9	North Finchley	7	1

BARNET TOWN CENTRES STUDY - NOVEMBER 2008
BENCHMARKING OF CENTRES

TABLE 4

	Centre	Rank by 2007 Prime Retail Rents (£ per sqm)	Rank Score
1	Central London	5,095	9
2	Brent Cross	4,736	8
3	Watford	3,337	7
4	Enfield	1,615	6
5	Harrow	1,561	5
6	Wood Green	1,453	4
7	Edgware	1,023	3
8	North Finchley	753	2
9	Borehamwood	484	1

BARNET TOWN CENTRES STUDY - NOVEMBER 2008
BENCHMARKING OF CENTRES

TABLE 5

	Centre	Rank by Prime Retail Yield (Jan 2008)	Rank Score
1	Central London	4.25	9
2	Brent Cross	4.25	9
3	Watford	5.5	7
4	Harrow	5.75	6
5	Enfield	5.75	6
6	Wood Green	5.75	6
7	North Finchley	6	3
8	Edgware	8.5	2
9	Borehamwood	-	1

BARNET TOWN CENTRES STUDY - NOVEMBER 2008
BENCHMARKING OF CENTRES

TABLE 6

	Centre	Rank Score
1	Central London	43
2	Watford	39
3	Brent Cross	36
4	Harrow	30
5	Wood Green	26
6	Enfield	25
7	Edgware	13
8	North Finchley	10
9	Borehamwood	8

APPENDIX 2

HEALTHCHECKS

APPENDIX 2A

KEY INDICATORS

LB Barnet: Regional, Major and District Centre - Key Indicators

Retail Composition by Number of Units

	Town Centre	Total Outlets	% Convenience	% Comparison	% Services	% Vacant
UK Average	-	**-**	**8.82%**	**35.22%**	**45.87%**	**9.93%**
Major	Brent Cross	125	5.60%	75.20%	17.60%	1.60%
Regional	Edgware	239	10.46%	34.73%	48.12%	6.69%
District	North Finchley	238	7.98%	30.67%	54.20%	7.14%
	Finchley Church End	235	14.04%	23.83%	54.47%	7.66%
	Chipping Barnet	223	9.87%	39.01%	46.19%	4.93%
	Golders Green	185	10.81%	26.49%	54.59%	8.11%
	Brent Street	168	14.88%	22.02%	54.17%	8.93%
	Temple Fortune	145	16.55%	35.86%	45.52%	2.07%
	Hendon Central	138	13.04%	21.01%	60.14%	5.80%
	Burnt Oak	123	22.76%	36.59%	35.77%	4.88%
	East Finchley	117	15.38%	23.08%	53.85%	7.69%
	Mill Hill	108	11.11%	30.56%	55.56%	2.78%
	Whetstone	91	8.79%	29.67%	58.24%	3.30%
	New Barnet	80	7.50%	23.75%	51.25%	17.50%
	Cricklewood	63	19.05%	17.46%	63.49%	0.00%
	Colindale - The Hyde	44	15.91%	27.27%	52.27%	4.55%

Source: LB Barnet / Experian Goad Town Centre Surveys (May 2007)

LB Barnet: Regional, Major and District Centre - Key Indicators

Vacancy Rate by Unit and Floorspace

	Town Centre	*Vacant Units*	*% Total Units*	*Vacant floorspace (sq.m)*	*% of Total Floorspace*
UK Average	-	**-**	**9.93%**	**-**	**8.14%**
Major	Brent Cross	2	1.60%	1,420	2.37%
Regional	Edgware	16	6.69%	2,160	4.94%
District	Finchley Church End	18	7.66%	1,540	4.93%
	North Finchley	17	7.14%	3,770	9.95%
	Golders Green	15	8.11%	2,630	9.94%
	Brent Street	15	8.93%	1,560	8.81%
	New Barnet	14	17.50%	920	7.15%
	Chipping Barnet	11	4.91%	1,240	3.26%
	East Finchley	9	7.69%	1,440	7.70%
	Hendon Central	8	5.80%	1,080	6.53%
	Burnt Oak	6	4.88%	610	3.91%
	Mill Hill	3	2.78%	390	2.34%
	Whetstone	3	3.30%	330	2.36%
	Temple Fortune	3	2.07%	440	2.06%
	Colindale - The Hyde	2	4.55%	170	3.74%
	Cricklewood	0	0.00%	0	0.00%

Source: LB Barnet / Experian Goad Town Centre Surveys (May 2007)

LB Barnet: Regional, Major and District Centre - Key Indicators

Ranking of Retailer Requirements

	Town Centre	*Number of Requirements*	*Retail Category*		
			Comparison	***Convenience***	***Service***
Major	Brent Cross	54	43	0	11
Regional	Edgware	14	10	1	3
District	Golders Green	13	10	0	3
	Mill Hill	10	4	0	6
	Cricklewood	8	5	1	2
	North Finchley	7	4	0	3
	Whetstone	6	3	0	3
	East Finchley	3	2	0	1
	Temple Fortune	3	2	0	1
	Burnt Oak	2	2	0	0
	Colindale - The Hyde	2	1	0	1
	Hendon Central	2	1	0	1
	Brent Street	-	-	-	-
	Chipping Barnet	-	-	-	-
	Finchley Church End	-	-	-	-
	New Barnet	-	-	-	-

Source: Focus Property Intelligence Database (August 2008)

LB Barnet: Regional, Major and District Centre - Key Indicators

Comparison of Prime Retail Rents (£ per sqm)

Centre	*2002*	*2003*	*2004*	*2005*	*2006*	*2007*
Brent Cross	4467	4467	4467	4575	4575	4736
Edgware	861	1023	1023	1023	1023	1023
Golders Green	484	484	484	484	538	538
Mill Hill	-	-	-	-	-	-
Cricklewood	-	-	-	-	-	-
North Finchley	538	592	592	753	753	753
Whetstone	-	-	-	-	-	-
East Finchley	-	-	-	-	-	-
Temple Fortune	-	-	-	-	-	-
Burnt Oak	-	-	-	-	-	-
Colindale - The Hyde	-	-	-	-	-	-
Hendon Central	-	-	-	-	-	-
Brent Street	-	-	-	-	-	-
Chipping Barnet	-	-	-	-	-	-
Finchley Church End	-	-	-	-	-	-
New Barnet	-	-	-	-	-	-

Source: Colliers CRE - June 2007

LB Barnet: Regional, Major and District Centre - Key Indicators

Comparison of Prime Retail Yields (% Change)

Centre	Apr-03	Jan-04	Jan-05	Jan-06	Jan-07	Jan 08
Brent Cross	5	4.75	5	4.5	4.25	4.25
Burnt Oak	10	10	10	9	8.5	7.5
Edgware	10	10	10	9	8.5	7.5
Golders Green	8.5	8.5	8	7.5	6.5	6
East Finchley*	7.5	8	7.5	7	6.5	6
Finchley Church End*	7.5	8	7.5	7	6.5	6
North Finchley*	7.5	8	7.5	7	6.5	6
Brent Street	-	-	-	-	-	-
Chipping Barnet	-	-	-	-	-	-
Colindale - The Hyde	-	-	-	-	-	-
Cricklewood	-	-	-	-	-	-
Hendon Central	-	-	-	-	-	-
Mill Hill	-	-	-	-	-	-
New Barnet	-	-	-	-	-	-
Temple Fortune	-	-	-	-	-	-
Whetstone	-	-	-	-	-	-

**Finchley*
Source: Valuation Office Agency - Property Market Report 2008

APPENDIX 2B

EDGWARE MAJOR TOWN CENTRE PROFORMAS

LB Barnet: Major Centre	EDGWARE	
		
COMPOSITION:		
Retail Category:	**Number of Units:-**	**Floorspace (sqm):-**
▪ **Convenience**	25 units	7,570 sqm
▪ **Comparison**	83 units	17,990 sqm
▪ **Services**	115 units	15,920 sqm
▪ **Vacant**	16 units	2,160 sqm
	TOTAL = 239 units	**TOTAL = 43,690 sqm**
Market Share: ▪ **Convenience** ▪ **Comparison**		
Shopping Centre:	The Mall Shopping Centre (1990)	
Floorspace:	19,323 sqm gross	
Anchors:	Marks & Spencer, Sainsbury's.	
Other Retailers:	Superdrug, Boots, WH Smith, Dorothy Perkins, Game.	
Foodstores	Sainsbury's, Costcutter Express, independent convenience stores, butchers, fishmongers and specialist ethnic foodstores. There is also a Lidl foodstore within the LB Harrow section of the centre.	
Other Retail Provision	There are various multiple high street retailers within the Mall Shopping Centre and along Station Road. There are also good provision of property and financial services, opticians, hairdressers and a range of food and drink outlets.	
Other Uses	Offices	
Description of Unit Sizes	The majority of units on the main shopping streets are small-medium sized with some larger units e.g. those occupied by Tesco, Argos and a range of high street banks. A number of larger units are provided within the Mall Shopping Centre.	
ACCESSIBILITY:		
Public Transport	Edgware is served by the London Underground on the Northern Line. The station is situated adjacent to the entrance of the shopping centre. There is good accessibility by bus with 70 daytime services and two 24-hour routes. The bus station is also situated adjacent to the Shopping Centre.	
Pedestrian Linkages	The centre has wide pavements and a number of pedestrian crossings to facilitate movement throughout. The surrounding areas are largely residential with access to the main shopping areas at various locations along the main streets.	
Car Parking	There are approximately 1,072 parking spaces in off-street surface car parks. This includes a 260-space car park incorporated in the Mall Shopping Centre. In addition there are 48 designated on-street short-term parking spaces. A CPZ operates in parts of the centre providing protected parking facilities for residents, short-term parking for shoppers and long-term parking for town centre workers and commuters.	
ENVIRONMENTAL QUALITY:		
Built Environment & Landscaping	The centre has good provision of seating, bins, street lights and safety bollards, co-ordinatedly painted. The shopping centre offers a clean and pleasant shopping environment although planting at the front entrance could be enhanced. Buildings are generally three-four storeys in height and largely in good condition. Shop fascias are predominantly modern and well maintained. However, the quality of the environment deteriorates somewhat further south along Station Road and towards the junction with High Street and where the centre crosses into the LB Harrow.	

DEVELOPMENT OPPORUNITIES:
There is a large vacant public on Station Road which has potential for redevelopment for retail use.
SUMMARY & RECOMMENDATIONS:
Edgware is a large centre which offers a diverse range of retail outlets, both multiple and independently operated, across the comparison, convenience and service categories. The centre is easily accessible from a range of transport modes and supports good pedestrian linkages throughout. The quality of the environment varies with some areas, such as the Shopping Centre and parts of Station Road in a better overall condition than others for example, further south along Station Road. There are some vacant units but these do not significantly detract from the overall shopping environment. There is evidence of new investment in the area as well as some additional development opportunities. Overall, the centre is considered vital and viable and the retail offer adequately reflects its position as a major centre in the local shopping hierarchy.

APPENDIX 2C

DISTRICT TOWN CENTRE PROFORMAS

LB Barnet: District Centre	WHETSTONE	

COMPOSITION:

Retail Category:	Number of Units:-	Floorspace (sqm):-
▪ **Convenience**	8 units	2,720 sqm
▪ **Comparison**	27 units	3,580 sqm
▪ **Services**	53 units	7,350 sqm
▪ **Vacant**	3 units	330 sqm
	TOTAL = 91 units	**TOTAL = 13,980 sqm**

Foodstores	The main footsore in the centre is a 1,730 sqm Waitrose although just to the north of the centre there is also an M&S Simply Food store. Other convenience goods provision includes a continental supermarket, small convenience store, three newsagents, an off licence and a health food store.
Other Retail Provision	The comparison goods offer is largely dominated by independent operators offering clothing and footwear, jewellery and home furnishings. Many operators appear to be high quality and specialist independent retailers although there is some representation by multiple high street retailers including Boots and a number of well known charity shops. There is also a large B&Q warehouse to the south of High Road and a Carpetright adjacent to the M&S just north of the centre. There is good service provision and a quality food and drink offer. Some restaurants and cafes have outdoor seating provision which contributes to the street scene.
Other Uses	Offices, dentists.
Description of Unit Sizes	The centre comprises a range of small, medium and large units. Larger units are occupied by the Waitrose, Boots and some office uses. There are also large retail warehouse units occupied by M&S Simply Food, Carpetright and B&Q.

ACCESSIBILITY:

Public Transport	The centre is served by London Underground facilities with Totteridge and Whetstone underground station situated off Totteridge Lane just west of High Road. The centre is also well served by various bus routes.
Pedestrian Linkages	There are good links between the centre, surrounding uses, car park facilities and public transport connections. Pavements are generally wide throughout and despite heavy traffic flows through the centre, there is adequate provision of pedestrian crossing facilities to allow safe movement across the centre.
Car Parking	There are parking facilities to the rear of Waitrose and Boots providing approximately 170 spaces in total. There is some provision for on-street parking.

ENVIRONMENTAL QUALITY:

Built Environment & Landscaping	The centre is somewhat dominated by heavy traffic however the provision of wide pavements and trees alleviates the impact of the busy road. Shop fronts are generally modern and well-maintained and there is some provision of outdoor seating which contributes to the street scene. Some additional landscaping could further enhance the environment, particularly around the busy junction between High Road and Oakleigh Road North which detracts somewhat from the area.

DEVELOPMENT OPPORTUNITIES:

There are two vacant sites either side of the M&S / Carpetright units which have been acquired for redevelopment which may include additional retail provision.

SUMMARY & RECOMMENDATIONS:

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

LB Barnet: District Centre	TEMPLE FORTUNE



COMPOSITION:

Retail Category:	Number of Units:-	Floorspace (sqm):-
▪ Convenience	24 units	5,030 sqm
▪ Comparison	52 units	7,140 sqm
▪ Services	66 units	8,740 sqm
▪ Vacant	3 units	440 sqm
▪ Other	**TOTAL =145 units**	**TOTAL = 21,350 sqm**

Foodstores	The centre has above average representation by convenience goods operators. The main foodstores include a 1,230 sqm Waitrose and a 1,200 sqm M&S Simply Food store almost directly opposite. Additional provision includes various greengrocers, bakeries, fishmongers, off licences and news agencies.
Other Retail Provision	The centre offers a broad range of comparison goods provision including a number of boutiques offering higher quality clothing and footwear goods. Other outlets include gift shops, florists, booksellers, jewellery shops and home furnishing stores. There is some representation by multiple retailer operators including WH Smith and Boots. The centre has good service provision with a good range of multiple and independent café and restaurant operators as well as a range of financial and property services and health and beauty outlets.
Other Uses	Dentist, vets, offices, residential uses.
Description of Unit Sizes	Unit are generally small to medium in size. Larger units are occupied by the Waitrose and M&S foodstores.

ACCESSIBILITY:

Public Transport	The centre is served by four bus routes and access to the London Underground services can be achieved via nearby Golders Green tube station. There are also connections to mainline services at Hendon and Cricklewood.
Pedestrian Linkages	The centre benefits from wide pavements and good provision of pedestrian crossings. There are various residential properties distributed along Finchley Road and good links between the centre and wider surrounding residential areas.
Car Parking	The M&S foodstore provides approximately 55 off-street parking spaces. There is also some provision of on-street pay and display parking for shoppers.

ENVIRONMENTAL QUALITY:

Built Environment & Landscaping	The centre displays attractive suburban qualities which includes some historic and architecturally-impressive buildings, good provision of trees and planting, seating, bins and well-maintained pavements. Shop fronts are modern but sympathetic to the suburban environment and the majority are well maintained. Overall the centre is attractive, clean and a considered a pleasant shopping environment.

DEVELOPMENT OPPORTUNITIES:

There is a large vacant site towards the south of Finchley Road, previously occupied by Kwik Fit which could provide potential opportunity for additional retail development.

SUMMARY & RECOMMENDATIONS:

Temple Fortune is an attractive centre which benefits from a high quality convenience offer which includes both Waitrose and M&S in addition to a range of independent and specialist operators. Despite the quality offer, the Waitrose store was cramped and poorly configured with thin aisles and the M&S store was not overly busy at the time of our site visit. The centre boasts a similarly high quality range of comparison goods and services provision. There is no direct tube or railway station serving the centre but there is adequate bus provision and stations situated in relatively close proximity. Overall, the centre benefits from high quality architecture and an overall clean and well-maintained environment. Temple Fortune is considered to be performing well and in accordance with its designated status in the shopping hierarchy.

LB Barnet: District Centre	NORTH FINCHLEY



COMPOSITION:		
Retail Category:	**Number of Units:-**	**Floorspace (sqm):-**
▪ **Convenience**	19 units	6,340 sqm
▪ **Comparison**	73 units	10,490 sqm
▪ **Services**	129 units	17,300 sqm
▪ **Vacant**	17 units	3,770 sqm
	TOTAL = 238 units	**TOTAL = 37,900 sqm**

Foodstores	The main foodstore is the Sainsbury's (4,320 sqm) on High Road. This is also an Iceland and various smaller foodstores including bakeries, grocers, health food stores and newsagents. There is a Waitrose (2,526 sqm) on Ballards Lane situated just outside of the district centre boundary.
Other Retail Provision	There is a good range of comparison goods on offer and a number of high street multiples including River Island, Argos, Waterstones and Woolworths. There is also a large Homebase retail warehouse. There is also high provision of service outlets comprising both multiple and independent operators. This provision covers a wide range of uses within the service category and includes hair and beauty outlets, financial and property services and a number of food and drink operators as well as dry cleaners, video rental and betting shops. A market also operates on Fridays.
Other Uses	Library, snooker clubs, offices.
Description of Unit Sizes	Unit size varies across the centre from small to large. The majority of the multiple high street retailers occupy larger units. The Sainsbury's is the largest occupied unit in the centre.
ACCESSIBILITY:	
Public Transport	The centre is not directly served by the London Underground however there is a bus station situated towards the south of the centre which provides good accessibility by various bus routes.
Pedestrian Linkages	There are good pedestrian links throughout the centre and between surrounding residential areas and public transport services. Pavements are generally wide and there is good provision of pedestrian crossings.
Car Parking	There are public car parks on Castle Street, Lodge Lane, Woodhouse Road and Stanhope Road providing approximately 400 pay and display car parking spaces. There are additional private car parks associated with the Sainsbury's and Waitrose food stores, the Homebase store and above the bus station.
ENVIRONMENTAL QUALITY:	
Built Environment & Landscaping	The quality of the environment in North Finchley is generally good although there is some scope for improvement, particularly in areas towards the south of High Road and the Grand Arcade which is somewhat dilapidated and there is a concentration of vacant units. Similarly, the northern sections of High Road around the vacant Furniture Land site is poorly-maintained and could be enhanced. The central area benefits from a greater number of multiple high street retailers which display modern and well-maintained fascias. There is some provision of trees and landscaping, seating and bins. Some vacant units are under-refurbishment and there are other signs of investment which suggest the centre is performing well.

DEVELOPMENT OPPORTUNITIES:

The site of the former Furniture Land unit at 886-902 High Road represents a key development opportunity which could initiate wider improvement of the immediate surrounding area and an expansion of the centre towards the north. At the opposite end of the centre, the Grand Arcade is somewhat dated and suffers from a concentration of vacant units. This site represents a good redevelopment opportunity which could allow better integration with the modern bus station development directly opposite.

SUMMARY & RECOMMENDATIONS:

North Finchley benefits from good representation by a number of multiple high street retailers and service providers. Additional key attractors include the Sainsbury's and Waitrose foodstores and a large Homebase towards the south of High Road. The centre generally displays a clean and high quality shopping environment and there are obvious signs of on-going investment. There are also development opportunities to further enhance the retail offer and expand the centre. Overall, the centre is considered to be performing well and in line with its position in the local shopping hierarchy.

LB Barnet: District Centre	NEW BARNET	
  		
COMPOSITION:		
Retail Category:	**Number of Units:-**	**Floorspace (sqm):-**
▪ **Convenience**	6 units	5,200 sqm
▪ **Comparison**	19 units	2,380 sqm
▪ **Services**	41 units	4,379 sqm
▪ **Vacant**	14 units	920 sqm
	TOTAL = 80 units	**TOTAL = 12,870 sqm**
Foodstores	The main foodstore is Sainsbury's (4,760 sqm) situated on East Barnet Road. Other provision includes two smaller convenience stores, an off licence and two newsagents.	
Other Retail Provision	There is a limited comparison retail offer and the centre is dominated by service outlets with a high number of fast food takeaways and hairdressers.	
Other Uses	LA Fitness	
Description of Unit Sizes	The Sainsbury's foodstore occupies the largest unit which dominates the centre. Surrounding units are generally small with a few exceptions.	
ACCESSIBILITY:		
Public Transport	New Barnet benefits from good public transport links to the mainline railway at New Barnet station situated to the rear of Sainsbury's. In addition the centre is also served by eight bus routes.	
Pedestrian Linkages	There are good pedestrian linkages between the centre and surrounding residential areas and pubic transport facilities. Traffic flows through the centre along East Barnet Road, however the provision of pedestrian crossings facilitates safe and easy pedestrian movement throughout.	
Car Parking	There is a car park above the Sainsbury's which provides approximately 120 spaces. There are a further 80 spaces within the station car park and two public car parks, situated off East Barnet Road, which provide an additional 59 spaces.	
ENVIRONMENTAL QUALITY:		
Built Environment & Landscaping	The quality of the environment varies across the centre. Around the Sainsbury's, the pavement is wide and well maintained and there is some provision of trees and seating. Elsewhere the pavement is less wide and in parts, in need of repair. Some units display modern fascias and attractive shop fronts however others are less well-maintained and there are a number of vacant units which detract from the overall environment.	
DEVELOPMENT OPPORTUNITIES:		
Asda has submitted an application proposing a 3,700 sqm Asda foodstore as part of a mixed-use redevelopment of the former Transco site off Albert Road. This site is the subject of a planning brief approved by LB Barnet in March 2000 which considers the provision of retail, residential, leisure, business and community facilities as appropriate uses. There is also potential for a Tesco development on part of the former OpTex building site which sits between East Barnet Road and Victoria Road. Tesco's proposals have yet to reach the application stage.		
SUMMARY & RECOMMENDATIONS:		
New Barnet is a relatively small centre which is dominated by the Sainsbury's foodstore and service outlets. There is limited other convenience provision and poor representation by comparison goods operators. The environment is adequate in places but some areas would benefit from aesthetic enhancement, particularly along Lytton Road and parts of East Barnet Road. However, there are various significant developments in the pipeline, most notably on the former Transco site which is supported by a planning brief adopted by the Council and a planning application has been formally submitted. Additional proposals from Tesco adds to the future prospect of the centre that will bring about beneficial improvements to secure the future performance and overall health of the centre.		

LB Barnet: District Centre	MILL HILL	
		
COMPOSITION:		
Retail Category:	**Number of Units:-**	**Floorspace (sqm):-**
▪ **Convenience**	12 units	2,130 sqm
▪ **Comparison**	33 units	5,290 sqm
▪ **Services**	60 units	8,880 sqm
▪ **Vacant**	3 units	390 sqm
	TOTAL = 108 units	**TOTAL = 16,690 sqm**
Foodstores	The main foodstore is a Marks & Spencer Simply Food. There is also a Costcutter convenience store and a good range of local stores including three delicatessens, a bakery and a butcher amongst others.	
Other Retail Provision	There is good provision of ladies and children's clothing and footwear, with outlets offering high quality and designer goods. There is some representation form high-street multiple retailers including WHSmith, Boots, Woolworths and some national charity shop operators. Various independent operators include florists, gift shops, jewellers, home furnishing stores as well as a pet shop and an art dealer. There is a good range of service provision which includes a good number of high-street banks, property services, opticians as well as dry cleaners, beauty salons and a broad range of food and drink outlets.	
Other Uses	Offices and local religious centre.	
Description of Unit Sizes	Units are generally small. The largest unit is occupied by the Marks & Spencer foodstore which is approximately 560 sqm gross.	
ACCESSIBILITY:		
Public Transport	The centre is well served by public transport with direct links to mainline rail at Mill Hill Broadway station which is located off the high street. There is also a small bus station interchange which is served by six different routes to the surrounding area. There is also provision for cycle parking.	
Pedestrian Linkages	There are good pedestrian links between the main shopping street, public transport interchanges and despite busy roads surrounding the centre there are linkages to surrounding residential areas. The pavements are wide and of good quality and there is good provision of pedestrian crossings to facilitate movement through the centre.	
Car Parking	There are various surface car parks providing approximately 385 spaces, the majority of which are long-term spaces ideal for commuters. There is some on-street parking provision providing limited short-term parking for shoppers.	
ENVIRONMENTAL QUALITY:		
Built Environment & Landscaping	The centre is attractive with good quality shop fronts and pavements lined with trees. There is good provision of bins and seating in addition to out-door seating associated with the food and drink outlets which creates an active high street. Buildings lining the high street are traditional residential terraces rising 2-3 storeys in height with retail outlets at ground floor level. There are only three vacant units.	
DEVELOPMENT OPPORTUNITIES:		
The centre is relatively constrained by surrounding residential areas the road network which creates little scope for further expansion.		
SUMMARY & RECOMMENDATIONS:		
Mill Hill is an attractive centre offering a good range of quality retail goods and services. The centre benefits from good public transport links and is conveniently located to meet the needs of surrounding residential areas and those passing through. M&S is the main foodstore, well positioned opposite the bus and rail station to serve commuters. The centre has a good range of restaurants and cafes, some of which have out-door seating that at the time of our site visit were largely occupied, creating a lively street-scene. Overall, Mill Hill is considered a healthy centre which is vital and viable.		

LB Barnet: District Centre	HENDON CENTRAL	
		
COMPOSITION:		
Retail Category:	**Number of Units:-**	**Floorspace (sqm):-**
▪ **Convenience**	18 units	2,720 sqm
▪ **Comparison**	29 units	2,710 sqm
▪ **Services**	83 units	10,030 sqm
▪ **Vacant**	8 units	1,080 sqm
	TOTAL = 138 units	**TOTAL = 16,540 sqm**
Foodstores	There is a Costcutter, Nisa and a Premier Express amongst a range of small convenience store operators. Other convenience outlets include a bakery, two delicatessens, a grocer, two healthfood stores and a newsagent.	
Other Retail Provision	The centre provides a limited range of comparison goods. The majority of units are occupied by independent operators and there are a high number of charity shops. Store provision includes a number of mobile phone stores, two chemists, a pet shop, secondhand goods shop, DIY and furniture stores amongst others.	
Other Uses	Virgin Active health club, medical services, guest house and offices.	
Description of Unit Sizes	Unit size varies from small to medium. Some larger units are occupied by high street banks, the Costcutter and Nisa convenience stores and some restaurant operators.	
ACCESSIBILITY:		
Public Transport	The centre is served by the London Underground on the Northern Line. Hendon Central station benefits from a central position off Central Circus. There are five bus routes serving the centre with bus stops situated on Watford Way, Vivian Avenue, Hendon Way and Queens Road.	
Pedestrian Linkages	Heavy traffic through the centre impedes pedestrian flow although there is provision of subways to allow safe movement between the four main streets as well as pedestrian crossings on Vivian Avenue and Hendon Way.	
Car Parking	There is some provision for short stay on-street parking.	
ENVIRONMENTAL QUALITY:		
Built Environment & Landscaping	Traffic dominates the centre which creates a busy and somewhat unattractive environment for shoppers and pedestrians despite the provision of subways. There are some trees and planting provided as part of a garden arrangement with seating situated in front of the high street banks on the corner of Hendon Way and Vivian Avenue. However this does little to detract from the busy roadway. There are some further trees elsewhere in the centre but these are sparsely distributed and again do little to enhance the environment. The quality and width of pavements varies across the centre, as does the appearance of shop fronts with a mix of modern fascias and those that are less well-maintained and in need of refurbishment. There is some evidence of graffiti.	
DEVELOPMENT OPPORTUNITIES:		
The centre is relatively constrained by the main roads and surrounding uses. Our assessment identified no sites within the centre with potential to accommodate additional retail floorspace.		
SUMMARY & RECOMMENDATIONS:		
Hendon Central is a strategically located centre with good accessibility by various modes of transport. However, the retail offer is limited and the main roads which intersect at the centre create an unattractive environment which is neither pedestrian nor shopper-friendly. There are some trees and landscaping provision, however this could be further enhanced to improve the overall shopping environment and counter the dominance of the roads. There are a number of vacant units and the centre is considered in need of some improvement to maintain vital and viable.		

LB Barnet: District Centre	GOLDERS GREEN	
		
COMPOSITION:		
Retail Category:	**Number of Units:-**	**Floorspace (sqm):-**
▪ **Convenience**	20 units	4,420 sqm
▪ **Comparison**	49 units	6,570 sqm
▪ **Services**	101 units	12,840 sqm
▪ **Vacant**	15 units	2,630 sqm
	TOTAL = 185 units	**TOTAL = 16,540**
Foodstores	There is a large Sainsbury's (1,580 sqm) and a Tesco Express as well as a number of specialist ethnic convenience stores. Additional convenience provision includes three bakeries, two health food stores and various newsagents.	
Other Retail Provision	There are some multiple retailers including Boots, the Carphone Warehouse, Orange and Rymans. The majority of units are occupied by independent operators offering a range of retail goods and services. There are also a number of cafes, bars restaurants and takeaway outlets, financial and property services and health and beauty salons.	
Other Uses	LA Fitness Health Club, car pound, places of worship.	
Description of Unit Sizes	Units in the centre are generally small-medium sized with some larger units occupied by various foodstore operators. Sainsbury's and LA Fitness occupy the largest units, both situated edge of the centre.	
ACCESSIBILITY:		
Public Transport	The centre is served by the London Underground's Northern Line and Golders Green station is centrally positioned on the junction between Golders Green Road, North End Road and Finchley Road. There are 13 bus services, most of which serve the Golders Green bus station situated adjacent to the tube station. The bus station is also served by a number of National Express coach services to the Midlands and North of England.	
Pedestrian Linkages	There are good pedestrian linkages between the centre, surrounding residential areas and the public transport interchanges. Pavements are generally wide and there are a number of pedestrian crossings which facilitate movement throughout the centre.	
Car Parking	There are 70 off-street designated parking spaces provided by the Sainsbury's supermarket for customer use only. There is a CPZ providing protected parking facilities for residents, short-term parking spaces for shoppers and long-term parking for town centre workers and commuters.	
ENVIRONMENTAL QUALITY:		
Built Environment & Landscaping	Golders Green Road offers a pleasant shopping environment comprising well maintained shop fronts within an architecturally historic parade of buildings that rise 2-3 storeys in height. Throughout the centre pavements are wide and well maintained and on-street seating associated with some of the food and drink outlets adds to the vitality of the street scene. At the time of our site visit there was some evidence of litter in the area around Finchley Road however in general the centre was relatively clean with good provision of bins and no evidence of graffiti. The clock tower in the centre of the junction between Golders Green Road and Finchley Road provides an interesting focal point and the green space and landscaping around the station further adds to create a generally pleasant environment.	
DEVELOPMENT OPPORTUNITIES:		
There were some sizeable vacant units within the centre, particularly along Golders Green Road. In addition, there is a large vacant site adjacent to The Refectory public house on Finchley Road which offers some potential for redevelopment.		
SUMMARY & RECOMMENDATIONS:		
At the time of our site visit the centre was busy both in terms of pedestrian and vehicular flow throughout. There is a good range of retail and services on offer, particularly in respect of food and drink outlets, many of which provide on-street seating which enhances the vitality of the street scene. The majority of shop fronts appear well-maintained and there is some evidence of investment and new stores moving in to the centre. The centre has good accessibility by various transport modes and despite heavy traffic flows through the centre, the provision of pedestrian crossings supports adequate pedestrian permeability. There are some vacant units and a significant number of 'to-let' or 'for sale' signs on the upper floors which clutter the building facades along Golders Green Road and slightly detract from an otherwise pleasant environment		

LB Barnet: District Centre	FINCHLEY CHURCH END	

COMPOSITION:		
Retail Category:	**Number of Units:-**	**Floorspace (sqm):-**
▪ **Convenience**	33 units	7,350 sqm
▪ **Comparison**	55 units	7,010 sqm
▪ **Services**	129 units	15,360 sqm
▪ **Vacant**	18 units	1,540 sqm
	TOTAL = 235 units	**TOTAL = 31,260 sqm**
Foodstores	There is a large Tesco supermarket (3,880 sqm gross) supported by a range of small convenience stores, bakers, grocers and off-licences. There is also a noticeable number of specialist and ethnic foodstores.	
Other Retail Provision	There is a reasonable comparison goods offer over a range of categories including clothing, footwear, DIY and home furnishings, chemists and drugstores and charity shops. The majority of retailers are independent operators, although there is some representation by high street multiples including Superdrug, QS, Oxfam and Cancer Research. There are a significant number of service operators most notably in the food and drink industry, beauty and property service categories.	
Other Uses	Advice centre, offices.	
Description of Unit Sizes	Units range from small-medium in size. The largest unit is occupied by Tesco.	
ACCESSIBILITY:		
Public Transport	The centre benefits from good access to the London Underground via Finchley Central and West Finchley tube stations. The centre is also served by various bus routes.	
Pedestrian Linkages	There are good pedestrian linkages between the centre, surrounding residential areas and public transport links. The centre benefits from wide pavements and good provision of pedestrian crossings to allow easy pedestrian flow throughout.	
Car Parking	There is a multi-storey car park situated to the rear of the Tesco foodstore which provides 291 spaces. A further 276 spaces are provided in the Finchley Central station car park and there is also some provision of pay & display on-street parking.	
ENVIRONMENTAL QUALITY:		
Built Environment & Landscaping	The quality of the environment is generally good. The centre benefits from wide pavements, there is some provision of trees and other decorative planting, seating and bins. Building styles vary, with less attractive post-modern buildings integrated with more traditional three-storey terraces. In parts, the centre displays a suburban character of a quiet residential area. Shops fascias are generally modern and well-maintained although some could benefit from further enhancement.	
DEVELOPMENT OPPORTUNITIES:		
The centre is relatively constrained by surrounding residential areas and we have not identified any obvious potential development sites.		
SUMMARY & RECOMMENDATIONS:		
Finchley Church End is a linear centre anchored by the Tesco foodstore on Ballards Lane. There is a reasonable retail offer and a high level of service provision. The majority of units are occupied by independent operators and there is notable representation by those specialising in ethnic goods and services, particularly in the food and drink category. The centre is easily accessible from a range of transport modes and there are good pedestrian linkages. The environment is generally of a good quality although some of the post-modern buildings could be enhanced to better complement the more traditional suburban architecture. Overall, the centre was busy at the time of our site visit and considered to be performing in line with its status as a district centre in the shopping hierarchy.		

LB Barnet: District Centre	EAST FINCHLEY

COMPOSITION:

Retail Category:	Number of Units:-	Floorspace (sqm):-
▪ Convenience	18 units	3,430 sqm
▪ Comparison	27 units	4,710 sqm
▪ Services	63 units	9,120 sqm
▪ Vacant	9 units	1,440 sqm
	TOTAL = 117 units	**TOTAL = 18,700 sqm**

Foodstores	There is a Budgens (720 sqm), an Iceland foodstore and a Spar convenience store. Additional provision includes some smaller independent convenience store operators, a bakery, fishmonger, grocer, deli and off licences amongst others.
Other Retail Provision	The centre has a limited comparison retail offer which largely comprises chemists, florists and gift shops, electrical goods outlets and charity shops. There are few clothing outlets and no high street multiple operators. The centre has much greater representation in the service category with a noticeable number of multiple and independently operated cafes and restaurants as well as a number of beauty salons and estate agents.
Other Uses	Phoenix cinema, Finchley Youth theatre, medical facilities, offices.
Description of Unit Sizes	Units are generally small-medium sized. Larger units are occupied by the Budgens and Iceland foodstores.
ACCESSIBILITY:	
Public Transport	East Finchley is well served by London Underground facilities with East Finchley station situated at the south of High Road. In addition, there are three bus routes which serve the centre. There is some provision of cycle racks.
Pedestrian Linkages	There are good pedestrian links between the main shopping street and surrounding residential areas and public transport facilities. The centre benefits from wide pavements and good provision of pedestrian crossings enabling safe pedestrian movement across the centre.
Car Parking	There is provision for on-street parking along High Road.
ENVIRONMENTAL QUALITY:	
Built Environment & Landscaping	East Finchley benefits from a clean and generally pleasant shopping environment. High Road is lined with trees, pavements are wide and well maintained, there is good provision of seating, railings, bins, cycle racks and a landscaped feature at the front of the Budgens store. Building styles vary although the majority are traditional terraces and rise 2-3 storeys in height. Some buildings and shop fronts could benefit from some aesthetic enhancement however the majority are modern and well maintained. There are some vacant units but these are dispersed across the centre and do not significantly detract from the overall environment.

DEVELOPMENT OPPORTUNITIES:

There is a concentration of small single--storey vacant units along Lincoln Road which could benefit from refurbishment/redevelopment. Aside from this, East Finchley is considered relatively constrained by surrounding residential areas and the underground line to the south and our assessment did not identify any further potential development sites suitable for retail development.

SUMMARY & RECOMMENDATIONS:

East Finchley is a pleasant sub-urban centre. There is no single main foodstore but rather three smaller multiple operators (Budgens, Iceland and Spar) comprise the main convenience offer. The centre benefits from a good range of service outlets, however the comparison goods offer is more limited. The centre is generally well-maintained and attractive with a tree-lined high street, good quality pavements and the majority of buildings and shop fronts are modern and well-maintained. The centre benefits from good public transport provision and pedestrian links to surrounding residential areas. At the time of our site visit the centre was busy and considered healthy, vital and viable and consistent with its position in the retail hierarchy.

LB Barnet: District Centre	CRICKLEWOOD

COMPOSITION:

Retail Category:	Number of Units:-	Floorspace (sqm):-
▪ **Convenience**	12 units	3,050 sqm
▪ **Comparison**	11 units	7,000 sqm
▪ **Services**	40 units	4,870 sqm
▪ **Vacant**	0 units	0 sqm
	TOTAL = 63 units	**TOTAL = 14,920 sqm**

Foodstores	There is a Somerfield and Iceland in addition to a number of independent and specialist ethnic food stores and newsagents. There is also a Lidl foodstore opposite the new bus station development along Edgware Road.
Other Retail Provision	There is a B&Q warehouse situated off Cricklewood Lane. There is also a Matalan and Wickes retail warehouse units situated west of Cricklewood Broadway, but these are out-of-centre and within the LB Brent boundary.
Other Uses	The centre has a significant number of units in the service use category which comprises various ethnic food and drink outlets, hair and beauty salons and an amusement arcade amongst others.
Description of Unit Sizes	The majority of units situated along Cricklewood Broadway are small-medium sized. Larger units are occupied by the Somerfield and Iceland foodstores whilst the largest unit is the B&Q.

ACCESSIBILITY:

Public Transport	There are links to Thameslink railway line via Cricklewood railway station which is located off Cricklewood Lane. The centre is served by various bus routes and will benefit from a new bus station which is presently under construction opposite the Lidl foodstore on Edgware Road.
Pedestrian Linkages	There are adequate pedestrian links between the centre and surrounding areas and access to public transport. Pavements are generally wide throughout and there is sufficient provision of pedestrian crossings to facilitate safe movement across different parts of the centre despite heavy traffic flows along Cricklewood Broadway.
Car Parking	There is parking provision of 500 spaces to the rear of the B&Q store on Cricklewood Lane.

ENVIRONMENTAL QUALITY:

Built Environment & Landscaping	The quality of the environment varies across different parts of the centre. There is evidence of investment and on-going maintenance further south along Cricklewood Broadway towards the LB Camden boundary where there are also trees and the pavement is good quality in contrast to the northern parts of the main street. Both the built and landscaping environment in the northern parts of Cricklewood Broadway would benefit from enhancement, and in particular the redevelopment of the present vacant site on the corner of Depot Approach could lead in significantly revitalising this area of the centre.

DEVELOPMENT OPPORTUNITIES:

There are no vacant units but there is a large vacant site on the corner of Cricklewood Broadway with Depot Approach which occupies a prominent position and has potential for redevelopment for retail use which would benefit from a prime frontage directly onto the main shopping street.

SUMMARY & RECOMMENDATIONS:

At the time of our site visit the centre was busy both in terms of pedestrian and traffic flows. The quality of the environment varies with a less attractive and poorly-maintained environment towards the north of the centre but evidence of increasing maintenance and investment towards the south, noticeable by the new pavement, trees and modern shop fronts. The centre is well accessible by a range of transport modes and there is good parking provision for shoppers. The centre has a high number of ethnic foodstores, cafes, restaurants and takeaways and a more limited range of comparison goods on offer. However, this offer is accentuated by the B&Q store as well as the Matalan and Wickes retail warehouses which are considered key attractors to the area. Overall, the centre is considered healthy and viable although in parts, the overall aesthetic qualities could be enhanced to create a more attractive shopping environment.

LB Barnet: District Centre	COLINDALE

COMPOSITION:		
Retail Category:	**Number of Units:-**	**Floorspace (sqm):-**
▪ **Convenience**	7 units	530 sqm
▪ **Comparison**	12 units	1,190 sqm
▪ **Services**	23 units	2,660 sqm
▪ **Vacant**	2 units	170 sqm
	TOTAL = 44 units	**TOTAL = 4,550 sqm**

Foodstores	Convenience provision includes three independent grocer and delicatessen stores, an off licence, health food store and two newsagents.
Other Retail Provision	The comparison retail offer is limited to household furnishings, building supplies and car sales. There is also a music shop and a chemist and a range of service operators including a number of hairdressers, property and financial services and food and drink outlets. The majority of units are operated by independent retailers.
Other Uses	Place of worship.
Description of Unit Sizes	Units are generally small-medium sized although there is a large Wetherspoons public house and a reasonably sized vacant unit soon to be occupied by Costcutter.
ACCESSIBILITY:	
Public Transport	The centre is situated in close proximity to Colindale station which is on the Northern Line of the London Underground. The centre is served by three bus routes with bus stops positioned along Edgware Road.
Pedestrian Linkages	The centre has relatively wide pavements throughout and some pedestrian crossing facilities across the busy Edgware Road.
Car Parking	There is some provision for off-street parking outside the shop units in the LB Brent section of the centre and approximately 50 spaces at Varley Parade within Barnet's boundary. There is limited on-street parking along Edgware Road and Sheaveshill Avenue.
ENVIRONMENTAL QUALITY:	
Built Environment & Landscaping	Buildings are generally 2-3 storeys in height with retail on the ground floor and alternative uses above. The majority of shop fascias are modern and generally well maintained. The centre benefits from wide pavements and there is some provision of outdoor seating associated with food and drink uses on Edgware Road. There was some evidence of litter despite good provision of bins. There are some vacant units along Varley Parade which detract slightly from the environment although there is evidence that Costcutter will shortly occupy one of these units.

DEVELOPMENT OPPORUNITIES:

There is a large vacant site currently under construction between Woodfield Avenue and Hillfield Avenue.

SUMMARY & RECOMMENDATIONS:

The LB Barnet area of Colindale is relatively limited to a small portion along Edgware Road and Sheaveshill Avenue. The retail offer in these parts is largely dominated by services, particularly ethnic cafes and fast food takeaways but this is benefited by a range of additional retail provision situated west of Edgware Road within the LB Brent boundary. Overall, units appear generally well-maintained however the centre would benefit from some landscaping and planting provision, particularly around Varley Parade which is dominated by the car park in front. Overall the centre is considered to be performing well and consistent with its position in the retail hierarchy.

LB Barnet: District Centre	CHIPPING BARNET	

COMPOSITION:

Retail Category:-	Number of Units:-	Floorspace (sqm):-
▪ **Convenience**	22 units	5,030 sqm
▪ **Comparison**	87 units	14,770 sqm
▪ **Services**	103 units	16,630 sqm
▪ **Vacant**	11 units	1,240 sqm
	TOTAL = 223 units	**TOTAL = 37,670 sqm**

Foodstores	There is a large Waitrose foodstore (2,050 sqm) which anchors the Spires Shopping Centre. There is also an Iceland, Costcutter in addition to a number of bakeries, butchers, health food stores and independent convenience stores.
Other Retail Provision	Broad range of comparison goods on offer including clothes, gift shops, home furnishings and DIY amongst others. There is also good provision of services with a good mix of multiple and independently operated food and drink outlets, financial and property services and health and beauty facilities. There is a noticeable concentration of coffee shops in and around the Spires Shopping Centre.
Other Uses	Other uses include a women's only fitness centre, Barnet College buildings, an art centre, cultural & community facilities, medical services and public administration buildings.
Description of Unit Sizes	There are a broad range of unit sizes. The largest unit is occupied by Waitrose. Iceland, Boots and the Sofa Workshop also occupy some of the larger units.

ACCESSIBILITY:

Public Transport	The centre is served by the London Underground Northern Line via High Barnet tube station situated towards the south of the High Street. There are also five bus routes which serve the centre.
Pedestrian Linkages	The centre benefits from wide pavements and there is good provision of pedestrian crossings which facilitates pedestrian movement throughout the centre. There are also good links between the centre, the surrounding residential areas and public transport connections.
Car Parking	The centre has three public car parks at Staplyton Road, Fitzjohn Road and Moxon Street comprising in total, approximately 150 spaces. There is also a car park within the Spires Shopping Centre providing an additional 455 spaces. There is some provision of on-street parking along High Street but this is limited through CPZ restrictions.

ENVIRONMENTAL QUALITY:

Built Environment & Landscaping	Chipping Barnet displays many traditional qualities related to its role as a small market town. The centre extends in a linear form along High Street with a range of units sizes at the ground floor level of a mix of modern and more traditional building styles. At the time of our site visit the centre was clean with good provision of bins, well-maintained seating and clear signage. The majority of shop fronts display modern fascias and appear well-maintained. The Spires Shopping Centre offers a modern development which well-reflects the historic characteristics of the surroundings. The provision of decorative inner courtyards provides an attractive environment for shoppers and a focus for outdoor eating and drinking.

DEVELOPMENT OPPORTUNITIES:

The former Barnet Market site remains vacant despite planning approval to redevelop the site to provide a new building with market space at ground floor level and residential units above. Construction had been scheduled to commence in September 2008 but has been put back due to declining market conditions. There is a substantial site to the rear of 128-140 High Street which may provide some opportunity for additional retail development.

SUMMARY & RECOMMENDATIONS:

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

LB Barnet: District Centre	BURNT OAK	



COMPOSITION:		
Retail Category:	**Number of Units:-**	**Floorspace (Sqm):-**
▪ **Convenience**	28 units	4,570 sqm
▪ **Comparison**	45 units	5,520 sqm
▪ **Services**	44 units	4,920 sqm
▪ **Vacant**	6 units	610 sqm
	TOTAL = 123 units	**TOTAL = 15,620 sqm**
Foodstores	The main foodstore is a Tesco Metro on Burnt Oak Broadway. There is also a Greggs bakery and a number of independent and specialist ethnic foodstores concentrated along Watling Avenue.	
Other Retail Provision	There are some multiple retailers such as Superdrug, although the majority of units within LB Barnet's borough boundary are occupied by discount and independent retail and service operators. On Saturdays, Watling Market takes place in the pay & display car park to the rear of the London Underground station.	
Other Uses	Dentist, Advice Centre, Nursing Home, Registry Office, Community Centre.	
Description of Unit Sizes	The majority of units within Barnet's boundary are generally small in size. The Tesco foodstore on Burnt Oak Broadway occupies the largest unit.	
ACCESSIBILITY:		
Public Transport	The centre is served by the London Underground on the Northern Line. Burnt Oak Station is situated to the north of Watling Avenue. There is good accessibility by bus with various routes operating through the centre along Burnt Oak Broadway and Watling Avenue.	
Pedestrian Linkages	The centre has wide pavements and good provision of pedestrian crossings to facilitate pedestrian movement despite heavy traffic flows through the centre. There is also good access from surrounding residential areas to the main shopping street.	
Car Parking	There is a pay and display car park to the rear of the London Underground station providing approximately 250 spaces. There are 50 spaces in a customer car park at the Tesco foodstore.	
ENVIRONMENTAL QUALITY:		
Built Environment & Landscaping	The quality of the environment varies throughout the centre. Along Burnt Oak Avenue the quality of the environment is generally good although there was some evidence of graffiti and littering and the area around the Tesco foodstore could be improved. The majority of retail operators along Watling Avenue extend their display of goods onto the pavement and largely possess the appearance of market stalls. This creates a lively but cluttered shopping environment which dominates the street.	

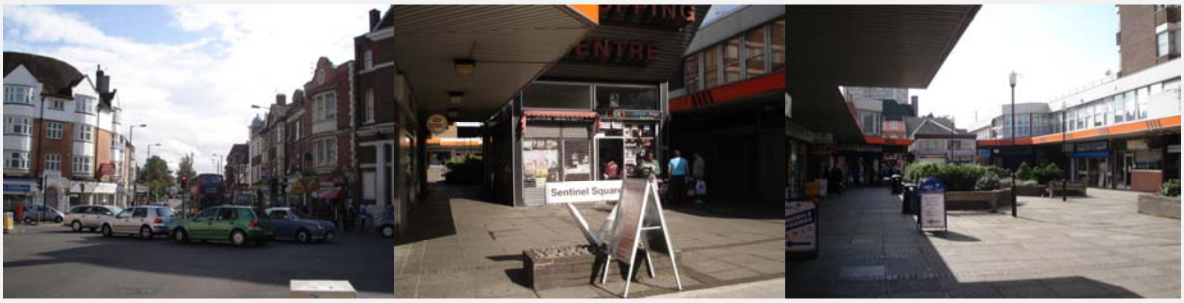
DEVELOPMENT OPPORTUNITIES:

There are some vacant units although these are widely-distributed throughout the centre. There are two large vacant sites adjacent to one another on Burnt Oak Broadway (a former car-sales outlet and an office building called Allied House) both of which are presently boarded up for redevelopment. Both sites are situated within the LB Brent boundary.

SUMMARY & RECOMMENDATIONS:

Burnt Oak is a reasonably large centre which offers a reasonably wide range of retail goods and services. There is representation by some multiple retailer operators such as Peacocks and Shoefayre, however these are predominantly situated within the LB Brent boundary. The parts of the centre located with Barnet are dominated by small independent operators and there are a significant number of discount and ethnic operators offering a similar range of retail goods and services. The quality of the environment varies with a mix of modern fascias and market-type shop fronts creating a haphazard street scene. At the time of our site visit Burnt Oak was busy both in terms of pedestrian and vehicular movement through the centre. In general, the centre appears in good health although it could benefit from some aesthetic improvements to enhance the overall quality of the environment for local shoppers.

LB Barnet: District Centre	BRENT STREET	



COMPOSITION:		
Retail Category:	**Number of Units:-**	**Floorspace (sqm):-**
▪ **Convenience**	25 units	3,070 sqm
▪ **Comparison**	37 units	4,480 sqm
▪ **Services**	91 units	8,590 sqm
▪ **Vacant**	15 units	1,560 sqm
	TOTAL = 168 units	**TOTAL = 17,700 sqm**
Foodstores	There is a small Tesco supermarket (940 sqm gross) in Sentinel Square. Additional convenience provision includes a range of specialist ethnic foodstores, bakeries and grocers, off licences, newsagents and a shoe repairer. There is also an M&S Simply Food store within the BP filling station off Finchley Lane.	
Other Retail Provision	There are a number of independent operators offering a range of comparison retail goods including clothes, chemists, jewellers, household goods and furniture stores and DIY outlets. There are a significant number of units in the service category comprising a number of food and drink outlets, financial and property services as well as health and beauty operators.	
Other Uses	Offices, Jobcentre, Health Club	
Description of Unit Sizes	Units are generally small-medium sized. The largest unit is occupied by the Tesco foodstore in Sentinel Square.	
ACCESSIBILITY:		
Public Transport	Brent Street is served by various bus routes and the Northern Line of the London Underground at Hendon Central which is approximately five minutes walk from the centre. There is also access to mainline services via West Hendon station situated nearby.	
Pedestrian Linkages	Heavy traffic dominates the centre although there is some provision of pedestrian crossings to enable movement across the main roads. Pavements are cluttered in places which reduces pedestrian permeability. There are various access points to the main shopping area from the surrounding residential areas and some residential uses directly within the centre.	
Car Parking	There is a multi-storey car park to the rear of Sentinel Square providing 92 spaces. There is also some provision of pay & display on-street parking along Church Road and Brent Street. Parking is restricted on some surrounding streets by CPZ.	
ENVIRONMENTAL QUALITY:		
Built Environment & Landscaping	The quality of the centre's environment could be improved. At the time of our site visit there was evidence of litter despite good provision of bins. In parts, the pavements were of poor quality and in need of improvements. In general shop fascias are modern and appear well maintained however the Sentinel Square shopping centre is considered dated and would benefit from refurbishment. The front entrance to the square is narrow and unwelcoming and whilst the inner courtyard provides some seating for shoppers, this area could be further enhanced with on-going maintenance and additional landscape and planting.	

DEVELOPMENT OPPORTUNITIES:

Sentinal Square is somewhat dated and could benefit from refurbishment or redevelopment.

SUMMARY & RECOMMENDATIONS:

At the time of our site visit Brent Street was busy both in terms of vehicular and pedestrian flows which supports its role as a key district centre. The centre is dominated by independent operators, particularly those in the service categories, and few multiple retailers aside from Tesco, M&S and some high street banks. The overall environment is of a low quality and would benefit from further enhancement, particularly around the Sentinel Square shopping centre which is dated and poorly integrates with the main shopping street. In general the centre is considered healthy and viable but its overall vitality could be improved.

APPENDIX 2D

LOCAL TOWN CENTRE PROFORMAS

LB Barnet: Local Centre	WEST HENDON	
  		
COMPOSITION:		
Retail Category: ▪ **Convenience** ▪ **Comparison** ▪ **Services** ▪ **Vacant**	**Number of Units:-** 12 units 22 units 31 units 12 units **TOTAL = 77 units**	**Floorspace (sqm):-** 1,220 sqm 2,510 sqm 2,620 sqm 1,500 sqm **TOTAL = 7,850 sqm**
Foodstores	Costcutter	
Other Retail Provision		
Other Uses		
Description of Unit Sizes		
ACCESSIBILITY:		
Public Transport		
Pedestrian Linkages		
Car Parking		
ENVIRONMENTAL QUALITY:		
Built Environment & Landscaping	Not v. nice.	
DEVELOPMENT OPPORTUNITIES:		
SUMMARY & RECOMMENDATIONS:		

LB Barnet: Local Centre	MARKET PLACE	


COMPOSITION:		
Retail Category:	**Number of Units:-**	**Floorspace (sqm):-**
▪ **Convenience**	9 units	800 sqm
▪ **Comparison**	17 units	1,550 sqm
▪ **Services**	26 units	2,020 sqm
▪ **Vacant**	5 units	890 sqm
	TOTAL = 57 units	**TOTAL = 5,260 sqm**

Foodstores	There is an independent convenience store and a good range of local convenience outlets including two butchers, three grocers and a bakery.
Other Retail Provision	The comparison goods offer comprises a broad mix of retail categories including ladies and children's clothing, jewellery, chemists, household furnishings as well as more specialist stores including a fine art dealer. The service offer is largely dominated by property and financial services, beauty salons and dry cleaners/laundrettes. There is low provision of food and drink outlets with just one bar one restaurant and one fast food take away.
Other Uses	Vets and offices.
Description of Unit Sizes	Small to medium sized units. The largest unit is vacant (35-41 Market Place).
ACCESSIBILITY:	
Public Transport	The centre is served by bus routes between central London and Finchley. There is no direct access to the London Underground or national rail services.
Pedestrian Linkages	There are good pedestrian linkages between the centre and surrounding residential areas. Pavements are wide but the centre is situated along the A1 dual-carriageway which creates some difficulty for pedestrian movement across the centre. There are pedestrian crossings and railings in place for pedestrian safety.
Car Parking	There is limited on-street parking and no car park facilities.
ENVIRONMENTAL QUALITY:	
Built Environment & Landscaping	The centre benefits from modern, well-maintained shop fronts, good quality pavements and reasonable provision of seating and bins. Trees line the pavement in places which helps detract from the road and heavy traffic passing through. Buildings display similar historical characteristics and are consistently three storeys in height.

DEVELOPMENT OPPORTUNITIES:

There is a site under construction which appears to be primarily residential. The centre is relatively constrained by surrounding residential units along the A1 which limits opportunities for expansion.

SUMMARY & RECOMMENDATIONS:

Market Place is a busy neighbourhood centre with a broad range of convenience, comparison and service outlets catering to the local needs of the surrounding population. The centre has attractive architecture, tree lined pavements and modern, well-maintained shop fronts. There are some vacant units but these do not overly detract from the environment. The centre benefits from good accessibility from its location along the A1, although the busy road impedes easy pedestrian movement across the centre and there is limited space for parking provision. Overall the centre is considered vital and viable and suitably ranked in the local retail hierarchy.

LB Barnet: Local Centre	FRIERN BARNET	
  		
COMPOSITION:		
Retail Category:	**Number of Units:-**	**Floorspace (sqm):-**
▪ **Convenience**	5 units	770 sqm
▪ **Comparison**	15 units	1,100 sqm
▪ **Services**	35 units	2,830 sqm
▪ **Vacant**	2 units	280 sqm
	TOTAL = 57 units	**TOTAL = 4,980 sqm**
Foodstores	Co-op, two newsagents, an off-licence and a convenience store/grocer.	
Other Retail Provision	The comparison retail offer is relatively limited with stores providing homeware and electrical goods. There is also a florist and a chemist but just two clothing stores. There is a good range of service operators including hairdressers, property and financial services and a noticeable number of outlets occupied by food and drink operators. In addition there is also a post office, opticians, three dry cleaners and a betting office. The majority of units are operated by independent retailers.	
Other Uses	There is a vets and a dentist surgery as well as the Town Hall. There are just two vacant units in the centre.	
Description of Unit Sizes	The majority of units are small with the largest occupied by the Co-op foodstore and The Orange Tree public house.	
ACCESSIBILITY:		
Public Transport	The centre is well served by local bus routes but the nearest London Underground stations are Arnos Grove and Finchley Central. The centre is also in relatively close proximity to New Southgate rail station.	
Pedestrian Linkages	The centre is dominated by busy traffic and there is limited opportunity to cross the road other than at the convergence of the four main roads. The centre benefits from wide pavements and good linkages to surrounding residential areas.	
Car Parking	There is some off-street parking provision outside the units to the north of Woodhouse Road and set back from the main road.	
ENVIRONMENTAL QUALITY:		
Built Environment & Landscaping	The centre is dominated by heavy traffic flows which creates a somewhat chaotic environment. Buildings range from one to three storeys in height and many are traditional residential-conversions with shops at ground floor level. Shop fronts are well maintained and there is some provision of bins and seating. Landscaping is limited to the area around the Town Hall and could be improved to enhance the overall attractiveness of the centre.	
DEVELOPMENT OPPORTUNITIES:		
The centre is surrounded by residential areas which create some limitation on further significant expansion. There are some vacant retail units and a moderately sized vacant ‘other building’ to the west of Colney Hatch Lane which could accommodate some new development.		
SUMMARY & RECOMMENDATIONS:		
Friern Barnet is a moderately-sized local centre which performs well as a convenient destination for local residents and those passing through to access a range of everyday goods and services. The centre provides particularly well in terms of food and drink services with a choice of take-aways, restaurants, cafes and public houses on offer. There are just two vacant units which support our view that the centre is vital and viable and not noticeably affected by the nearby Tesco store at Colney Hatch. The centre benefits from good accessibility from a range of transport modes although the overall attractiveness could be improved to alleviate the dominance of heavy traffic.		

LB Barnet: Local Centre	EAST BARNET	

COMPOSITION:

Retail Category:	Number of Units:-	Floorspace (sqm):-
▪ Convenience	12 units	1,960 sqm
▪ Comparison	22 units	1,550 sqm
▪ Services	44 units	3,280 sqm
▪ Vacant	3 units	260 sqm
	TOTAL = 81 units	**TOTAL = 7,050 sqm**

Foodstores	Budgens is the main foodstore complemented by traditional convenience outlets including a local bakery, butcher, delicatessen, grocer, newsagents and a health food store.
Other Retail Provision	There is a good range of comparison goods on offer including clothing, jewellery, household, gardening and home entertainment items. There are also some specialist stores including a toy store, record shop and a Christian bookstore. There is a complementary mix of fast food takeaways, restaurants, cafes and public houses with some provision for outdoor seating. Other service provision includes beauty salons, financial and property services, opticians and dry cleaners.
Other Uses	There are a number of religious centres and some office uses within the centre.
Description of Unit Sizes	Generally small although Budgens, the butcher and the public houses are somewhat larger.

ACCESSIBILITY:

Public Transport	The centre is well served by local bus services which provide connections to nearby London Underground at Cockfosters, High Barnet and Totteridge & Whetstone and local rail stations at Oakleigh Park and New Barnet.
Pedestrian Linkages	Pavements are generally wide and in good condition and there is good provision of pedestrian crossings to facilitate movement throughout the centre. There are good linkages between the centre and surrounding residential areas and it is within easy reach of additional facilities located in New Barnet district centre.
Car Parking	There is a car park situated to the rear of Budgens as well as a further car park to the rear of units on Church Hill Road but limited provision of on-street parking.

ENVIRONMENTAL QUALITY:

Built Environment & Landscaping	The centre displays an attractive village character arranged around a pleasant focal point where the roads converge. There is well maintained planting which adds to the overall attractiveness of the centre. Buildings range from one-three storeys in height and comprise a mix of traditional and post-modern styles. Some unit fronts and fascias would benefit from improvement but overall the centre is attractive and well-maintained.

DEVELOPMENT OPPORTUNITIES:

Further expansion is considered limited in view of residential areas surrounding the centre as well as other established uses such as the St Mary's Primary School.

SUMMARY & RECOMMENDATIONS:

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

LB Barnet: Local Centre	CHILDS HILL	

COMPOSITION:		
Retail Category:	**Number of Units:-**	**Floorspace (sqm):-**
▪ **Convenience**	4 units	640 sqm
▪ **Comparison**	14 units	1,250 sqm
▪ **Services**	35 units	3,370 sqm
▪ **Vacant**	5 units	420 sqm
	TOTAL = 62 units	**TOTAL = 5,680 sqm**

Foodstores	Convenience provision is limited to three independent convenience stores and a newsagent.
Other Retail Provision	Comparison goods provision is largely orientated around household interiors and DIY stores. There are some other uses including a florist, sportswear store, jeweller and chemist but in general the offer is limited. There is a wider range of services on offer although there is a noticeable number focused around building and property services. Other services include dry cleaners, hair and beauty salons, restaurants, cafes and fast food take-aways.
Other Uses	Offices, medical services and a community hall.
Description of Unit Sizes	Small-medium sized units at ground floor level of former-residential buildings.
ACCESSIBILITY:	
Public Transport	The centre is served by several bus routes which provide good links to the nearest London Underground station at Golders Green.
Pedestrian Linkages	There are relatively good pedestrian linkages between the centre, public transport links and surrounding residential areas. Traffic flows through the centre and there is a busy junction at the crossroads between Finchley Road, Cricklewood Lane and Hermitage Lane. There is provision of pedestrian crossings here to assist movement across the centre.
Car Parking	There is provision of on-street pay and display parking.
ENVIRONMENTAL QUALITY:	
Built Environment & Landscaping	The quality of the shop units varies with some displaying modern fascias whilst others would benefit from improvement. There is also an inconsistent retail frontage with other uses incorporated with retail units. There is some evidence of graffiti and litter and in places the pavement requires improvement. Some additional trees and planting would also enhance the built environment.

DEVELOPMENT OPPORTUNITIES:

There is a vacant site on the corner of the junction between Cricklewood Lane and Finchley Road which is boarded up for development. In view of its location this could represent an opportunity for some additional small-scale retail development, perhaps a foodstore to raise the convenience offer, as part of a mix-use residential scheme.

SUMMARY & RECOMMENDATIONS:

The centre is relatively limited in its retail offer with the majority of shops and services centred on property services and DIY/household interior goods. There are few convenience outlets and the centre could benefit from a small local foodstore to draw more local and passing trade. The overall quality of the environment varies, with some modern units but with limited planting, evidence of litter and poorly maintained pavements there is scope for improvement. Overall, the centre is considered viable but there is certainly opportunity for it to be enhanced.

APPENDIX 2E

LOCAL NEIGHBOURHOOD CENTRE PROFORMA

Review of Neighbourhood Centres, October 2008

Centre		Floorspace (sqm)	Comparison Units	Convenience Units	Service Units	Vacant Units	Summary
Great North Road		7,154	8	1	19	4	The centre comprises a selection of retail units situated along the Great North Road which makes the centre highly accessible by car. This is supported by ample provision of on and off-street parking to the front of retail units. The centre is well served by buses providing links to the tube and rail facilities in nearby district centres; Chipping Barnet and New Barnet. The comparison offer is largely orientated around home interior goods and includes some designer outlets such as Poggenphol. There is also a chemist, charity shop and motorcycle sale store. There is just one convenience store and service provision largely comprises hair and beauty salons and food and drink outlets. There is also an Odeon Cinema which extends the centre's role into the evening. Despite the busy road through the centre there are good pedestrian links and trees creating an attractive environment. There are four vacant units representing a below average vacancy rate of 8.96%. Overall the centre is considered vital and viable.
Holders Hill Circus		6,809	6	8	21	0	Holders Hill Circus is an attractive centre orientated around a landscaped junction between Holders Hill Road, Bittacy Lane and Langstone Way. The centre is characteristic of a local village centre with good provision of traditional convenience outlets including a butcher, three convenience stores, a grocer and a newsagent. This provision is further supplemented by a Waitrose foodstore situated just north of the main shopping area along Langstone Way. Comparison representation includes specialist stores such as a cycle store and pet shop. Service provision largely comprises health and beauty salons and food and drink outlets although there are also two dry cleaners, a betting office and a BP filling station. Overall the centre appears attractive and well-maintained and, with no vacant units, it is considered vital and viable.

Centre		Floorspace (sqm)	Comparison Units	Convenience Units	Service Units	Vacant Units	Summary
Golders Green Road		5,625	12	12	22	3	Golders Green Road comprises a linear development of retail units situated in close proximity to the district centre of Golders Green. There is a large Jewish population residing in this part of the Borough and this is reflected in the centre's retail offer which comprises a number of kosher foodstores and comparison outlets specialising in religious products. Retailers also benefits from two Jewish community centres situated within the centre. There is a broad mix of services on offer which are characteristics of a local centre this size. These include an opticians, dry cleaners, betting office, hair salons as well as some financial and property services. There are also a range of food and drink outlets which again largely cater for the surrounding Jewish communities. There is limited provision of parking and some units could benefit from improvement. However, at the time of our site visit the centre was bustling and overall considered to be performing well in its role as a neighbourhood centre.
Hale Lane		3,836	7	6	26	2	Hale Lane is centred around a busy road junction between Hale Lane and Dean's Lane which is in close proximity to Mill Hill district centre. Food provision is limited to a convenience store and a grocer whilst other the remaining convenience offer comprises a health food store, a newsagent and two off licences. Other than a chemist, the comparison goods offer is similarly limited, mainly to retailers operating in the building goods and supplies or home interior categories. Service provision is largely dominated by food and drink operators and hair and beauty outlets. There is also a Texaco filling station. The centre is somewhat dominated by traffic passing through although there is good provision of crossings to facilitate safe pedestrian movement. There is also some provision for on-street parking. There are just two vacant units and overall the centre appears to be well maintained and performing well in its role as a neighbourhood centre.

Centre		Floorspace (sqm)	Comparison Units	Convenience Units	Service Units	Vacant Units	Summary
Hampden Square		3,808	13	3	22	2	Retail units are orientated around the road junction between Osidge Lane, Hampden Way and Brookside South. The centre has limited convenience provision with one grocer, a newsagent and off-licence. There is a broad mix of comparison operators including three clothing outlets (one specialising in wedding dresses), a jeweller, a gift shop, a pet shop and a pharmacy. There is also noticeable representation from retailers offer DIY and households goods. The majority of units are occupied by service operators mainly comprising restaurants and fast-food takeaways, hair and beauty salons and dry cleaners. There is also a post office and a bookmaker. The centre is attractive with modern and well-maintained shop fronts and pleasant landscaping features. There is some provision of on-street parking and a free car park to the south of the centre along Osidge Way. Overall the centre is considered healthy although there may be scope to enhance the fresh food convenience goods offer.
Colney Hatch Lane		3,420	5	7	17	3	The centre comprises a linear development of retail units along Colney Hatch Lane, towards the eastern boundary between Barnet and the LB of Haringey. Food provision is limited to one convenience store and a bakery. Comparison goods provision is similarly limited to a chemist, a florist and home interior goods. The majority of units are occupied by service operators mainly comprising food and drink outlets and hair and beauty salons. The majority of shops appear well-maintained and there are some established trees lining the road which complement the centre. There is a new residential development currently under construction which currently disrupts the continuity of the centre, however the development appears near completion and so not considered a significant issue. The new development incorporates a new library and highlights on-going investment in the area. Overall, the centre is considered to be performing well to its role as a local neighbourhood centre.

Centre		Comparison Units	Convenience Units	Service Units	Vacant Units	Floorspace (sqm)	Summary
Grahame Park		1	5	11	2	3,382	Grahame Park is a neighbourhood centre embedded within the Barnet's largest housing estate. The centre is disadvantaged by its inward-looking design which isolates it from surrounding areas and creates a closed and somewhat intimidating environment for residents and visitors. The comparison retail offer is limited to a chemist. Local convenience operators include a bakery, halal butcher, a newsagents and an off-licence. The main foodstore is a Spar convenience store. Services include a post office, betting office, fast food outlets, a public house and property service operators. There are various community facilities including a library, health centre and advice centre amongst others. There is obvious deprivation in the housing estate which is reflected in the centre and creates an intimidating and ultimately unattractive environment. However, there is a masterplan for the regeneration of the area to provide 572 new homes and a new shopping area. A CPO was approved in February 2008 and work on the first phase is anticipated in early 2009.
Apex Corner		9	1	14	1	3,232	Retail units are situated along Watford Way (A1) and around the major roundabout linking the A1 with Edgware Road (A41) and the A5109. The retail offer is limited with just one convenience store and the comparison offer is largely specialist; comprising retailers such as a gentleman's suit shop and a disabled equipment store. There are three operators providing vehicle hire services while the remaining service offer comprises fast food takeaways, a bar, betting office, beauty salon and financial services. The centre is set back from the main road with insufficient off-street parking to the front of units. There is little space between parked vehicles and the units which creates a somewhat cramped environment and there are poor pedestrian links across the centre as a result of its location on the busy road junction. Whilst the overall attractiveness of the centre could be enhanced, there is just one vacant unit and those units that are occupied are reasonably modern, well-maintained and appear to be trading well.

Centre		Comparison Units	Convenience Units	Service Units	Vacant Units	Floorspace (sqm)	Summary
Deansbrook Road		4	6	13	2	1,785	The centre comprises 25 units situated in a linear development along Deansbrook Road and embedded within a largely residential area. The convenience goods provision is limited to a Nisa foodstore and a grocer. There are also two newsagents and an off-licence. Aside from a chemist, the comparison goods offer is limited to building supply operators, carpet and flooring or electrical goods. Service provision is similarly limited to fast food takeaways, many of which are closed during the day and add to the vacant look. Other services include hair and beauty salons, estate agents, betting office and a post office. The centre appears somewhat run-down and there are a concentrated number of vacant units which are unattractive. The LB Barnet's survey data indicates just two vacant units however at the time of our site visit in October 2008, this had increased to five although one of the former vacant units was now occupied as a restaurant. The centre has provision for on-street parking and there are bus stops to the east and west of the main parade of shops along Deansbrook Road.
New Southgate		2	1	4	0	799	New Southgate is a disjointed centre situated on the boundary between Barnet and Enfield. Just seven units reside within Barnet whilst the majority are situated in the neighbouring borough. Those units in Barnet comprise one convenience store, a chemist, a toy store, a café, a restaurant, a fast food take away and a business services outlet. Units front onto Friern Barnet Road which is busy with traffic and there is limited provision of parking. The centre benefits from close proximity to both New Southgate station and Arnos Grove London Underground station. The centre is not overly attractive and a large vacant public house detracts from this further. Pavements are wide but in need of maintenance in parts. In general, those parts of the centre situated within Barnet appear to be performing well although there is scope for aesthetics improvements.

Source: LB Barnet / GVA Grimley on site surveys, October 2008

APPENDIX 2F

COMPARISON MARKET SHARE BY GOODS CATEGORY

LB BARNET
BOROUGH-WIDE TOWN CENTRES STUDY 2008

BRENT CROSS REGIONAL SHOPPING CENTRE

Expenditure Weighting:	Clothing & Footwear 851	Furniture Floor Cov. 409	DIY & Dec. Goods 219	Domestic App 367	TV, Hi Fi Radio 452	Personal & Luxury 886	**WEIGHTED** 3184
Zone	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	22.3	16.2	1.3	22.8	21.3	17.8	18.7
2	21.1	13.8	0.0	22.8	20.8	14.1	16.9
3	38.7	20.8	3.5	21.7	24.1	18.1	24.2
4	57.6	32.8	0.0	41.2	48.5	49.3	45.0
5	56.0	29.2	3.1	45.1	45.3	32.8	39.7
6	27.8	17.1	3.7	35.6	31.7	19.2	23.8
7	59.6	37.7	12.1	43.6	43.1	29.6	41.0
8	37.4	36.4	7.3	35.8	29.8	35.0	33.3
9	30.5	18.5	0.0	26.0	27.5	30.7	26.0
10	56.4	32.0	6.3	51.2	48.1	47.9	45.7
11	55.4	40.9	6.1	39.1	36.6	49.2	43.9
12	5.5	6.9	0.0	6.8	6.4	4.5	5.3
13	25.0	27.3	0.0	24.4	32.1	17.3	22.4
14	19.3	21.7	2.9	19.5	26.4	21.1	20.0
15	33.0	26.6	2.7	29.9	38.6	21.6	27.4
16	18.4	17.5	6.8	24.3	25.4	6.8	15.9

EDGWARE MAJOR CENTRE

Expenditure Weighting:	Clothing & Footwear 851	Furniture Floor Cov. 409	DIY & Dec. Goods 219	Domestic App 367	TV, Hi Fi Radio 452	Personal & Luxury 886	**WEIGHTED** 3184
Zone	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	0.0	0.0	0.0	0.0	0.0	1.4	0.4
2	0.0	0.0	0.0	0.0	0.0	0.0	0.0
3	0.0	0.0	0.0	0.0	0.0	0.0	0.0
4	1.1	1.6	0.0	2.5	0.0	2.8	1.6
5	0.0	0.0	0.0	1.4	0.0	0.0	0.2
6	0.0	0.0	0.0	0.0	0.0	0.0	0.0
7	1.1	0.0	0.0	0.0	0.0	0.0	0.3
8	16.2	5.2	11.0	16.1	9.5	18.8	14.2
9	15.8	4.6	5.1	11.7	8.8	9.3	10.4
10	1.1	0.0	0.0	1.2	2.6	1.4	1.2
11	1.2	1.5	3.0	0.0	0.0	3.2	1.6
12	1.1	4.1	1.2	0.0	0.0	0.0	0.9
13	0.0	0.0	0.0	0.0	0.0	0.0	0.0
14	9.1	3.3	4.3	9.2	5.6	7.9	7.2
15	0.0	2.5	0.0	0.0	0.0	0.0	0.3
16	0.0	0.0	1.7	0.0	0.0	1.4	0.5

LB BARNET
BOROUGH-WIDE TOWN CENTRES STUDY 2008

BRENT STREET DISTRICT CENTRE

Expenditure Weighting:	Clothing & Footwear 851	Furniture Floor Cov. 409	DIY & Dec. Goods 219	Domestic App 367	TV, Hi Fi Radio 452	Personal & Luxury 886	**WEIGHTED** 3184
Zone	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	0.0	0.0	0.0	0.0	0.0	0	0.0
2	0.0	0.0	0.0	0.0	0.0	0	0.0
3	0.0	0.0	0.0	0.0	0.0	0	0.0
4	1.1	1.6	0.0	0.0	0.0	0	0.5
5	0.0	0.0	0.0	0.0	0.0	0	0.0
6	0.0	0.0	0.0	0.0	0.0	0	0.0
7	0.0	0.0	0.0	0.0	0.0	0	0.0
8	0.0	0.0	0.0	0.0	0.0	0	0.0
9	0.0	0.0	0.0	0.0	0.0	0	0.0
10	0.0	0.0	1.6	0.0	0.0	0	0.1
11	0.0	0.0	0.0	0.0	0.0	0	0.0
12	0.0	0.0	0.0	0.0	0.0	0	0.0
13	0.0	0.0	0.0	0.0	0.0	0	0.0
14	0.0	0.0	1.5	0.0	0.0	0	0.1
15	0.0	0.0	0.0	0.0	0.0	0	0.0
16	0.0	1.6	0.0	0.0	0.0	0	0.2

CHIPPING BARNET DISTRICT CENTRE

Expenditure Weighting:	Clothing & Footwear 851	Furniture Floor Cov. 409	DIY & Dec. Goods 219	Domestic App 367	TV, Hi Fi Radio 452	Personal & Luxury 886	**WEIGHTED** 3184
Zone	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	10.6	2.9	3.8	11.4	5.3	22	11.7
2	8.9	1.1	2.3	2.3	4.6	9.2	6.1
3	0.0	1.3	0.0	1.2	1.2	1.2	0.8
4	1.1	0.0	0.0	0.0	0.0	0.0	0.3
5	0.0	0.0	0.0	0.0	0.0	0.0	0.0
6	0.0	0.0	0.0	1.2	1.2	0.0	0.3
7	0.0	0.0	0.0	0.0	0.0	1.2	0.3
8	0.0	0.0	0.0	0.0	0.0	0.0	0.0
9	0.0	0.0	0.0	0.0	0.0	0.0	0.0
10	0.0	0.0	0.0	0.0	0.0	0.0	0.0
11	0.0	0.0	0.0	0.0	0.0	0.0	0.0
12	0.0	0.0	0.0	1.1	0.0	0.0	0.1
13	1.2	0.0	2.8	1.2	0.7	0.0	0.7
14	0.0	0.0	0.0	0.0	0.0	0.0	0.0
15	0.0	0.0	0.0	0.0	0.0	0.0	0.0
16	0.0	0.0	0.0	0.0	0.0	0.0	0.0

Adjusted adding 100% New Barnet zone 1 and 75% zone 2, 50% zone 3 and 50% zone 13

LB BARNET
BOROUGH-WIDE TOWN CENTRES STUDY 2008

CHURCH END, FINCHLEY DISTRICT CENTRE

Expenditure Weighting:	Clothing & Footwear 851	Furniture Floor Cov. 409	DIY & Dec. Goods 219	Domestic App 367	TV, Hi Fi Radio 452	Personal & Luxury 886	**WEIGHTED** 3184
Zone	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	0.0	0.0	0.0	0.0	0.0	0	0.0
2	0.0	0.0	1.3	0.0	0.0	0.0	0.1
3	0.0	0.0	0.0	0.0	0.0	0.0	0.0
4	0.0	0.0	1.4	0.0	0.0	0.0	0.1
5	2.2	0.0	0.0	0.0	1.6	1.6	1.3
6	0.0	1.3	1.2	0.0	0.0	0.0	0.2
7	0.0	0.0	1.5	1.3	0.0	0.0	0.3
8	0.0	0.0	0.0	0.0	0.0	0.0	0.0
9	0.0	0.0	0.0	0.0	0.0	0.0	0.0
10	1.1	0.0	0.0	0.0	0.0	0.0	0.3
11	0.0	0.0	0.0	0.0	0.0	0.0	0.0
12	0.0	0.0	0.0	0.0	0.0	0.0	0.0
13	0.0	0.0	1.4	0.0	0.0	0.0	0.1
14	0.0	0.0	0.0	0.0	0.0	1.3	0.4
15	0.0	0.0	0.0	0.0	0.0	0.0	0.0
16	0.0	0.0	1.7	0.0	0.0	1.4	0.5

EAST FINCHLEY DISTRICT CENTRE

Expenditure Weighting:	Clothing & Footwear 851	Furniture Floor Cov. 409	DIY & Dec. Goods 219	Domestic App 367	TV, Hi Fi Radio 452	Personal & Luxury 886	**WEIGHTED** 3184
Zone	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	0.0	0.0	0.0	1.3	0.0	0	0.1
2	0.0	0.0	1.3	0.0	1.4	0.0	0.3
3	1.1	0.0	1.2	0.0	0.0	0.0	0.4
4	1.1	0.0	0.0	0.0	0.0	0.0	0.3
5	1.1	0.0	3.1	1.4	1.6	3.1	1.8
6	0.0	1.3	7.3	3.4	3.7	3.8	2.6
7	0.0	1.5	9.1	1.3	1.5	2.5	1.9
8	0.0	0.0	0.0	0.0	0.0	0.0	0.0
9	0.0	0.0	0.0	0.0	0.0	0.0	0.0
10	0.0	0.0	1.6	0.0	0.0	0.0	0.1
11	0.0	0.0	0.0	1.5	0.0	0.0	0.2
12	0.0	0.0	0.0	0.0	0.0	0.0	0.0
13	0.0	0.0	0.0	0.0	0.0	0.0	0.0
14	0.0	0.0	0.0	0.0	0.0	0.0	0.0
15	0.0	0.0	2.7	0.0	0.0	1.4	0.6
16	1.1	0.0	6.8	0.0	0.0	0.0	0.8

LB BARNET
BOROUGH-WIDE TOWN CENTRES STUDY 2008

MILL HILL DISTRICT CENTRE

Expenditure Weighting:	Clothing & Footwear 851	Furniture Floor Cov. 409	DIY & Dec. Goods 219	Domestic App 367	TV, Hi Fi Radio 452	Personal & Luxury 886	**WEIGHTED** 3184
Zone	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	0.0	1.5	1.3	2.5	2.7	0	1.0
2	0.0	0.0	0.0	1.3	0.0	0.0	0.1
3	0.0	0.0	0.0	1.2	1.2	0.0	0.3
4	1.1	1.6	15.7	10.0	12.1	1.4	4.8
5	0.0	1.5	1.6	0.0	1.6	0.0	0.5
6	0.0	0.0	0.0	0.0	0.0	0.0	0.0
7	0.0	0.0	3.0	0.0	1.5	0.0	0.4
8	0.0	0.0	18.3	8.6	10.7	8.8	6.2
9	0.0	6.2	3.8	6.5	6.3	2.7	3.5
10	0.0	0.0	3.1	3.6	2.6	0.0	1.0
11	0.0	1.5	1.5	2.9	2.8	1.6	1.5
12	0.0	0.0	2.4	0.0	0.0	1.5	0.6
13	0.0	0.0	0.0	0.0	0.0	0.0	0.0
14	0.0	0.0	0.0	1.2	1.4	0.0	0.3
15	0.0	1.3	0.0	2.6	1.4	0.0	0.7
16	0.0	0.0	0.0	0.0	0.0	0.0	0.0

COLINDALE DISTRICT CENTRE

Expenditure Weighting:	Clothing & Footwear 851	Furniture Floor Cov. 409	DIY & Dec. Goods 219	Domestic App 367	TV, Hi Fi Radio 452	Personal & Luxury 886	**WEIGHTED** 3184
Zone	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	0.0	0.0	0.0	0.0	0.0	0	0.0
2	0.0	0.0	0.0	0.0	0.0	0.0	0.0
3	0.0	0.0	0.0	0.0	0.0	0.0	0.0
4	1.1	0.0	0.0	0.0	0.0	1.4	0.7
5	0.0	0.0	0.0	0.0	0.0	0.0	0.0
6	0.0	0.0	0.0	0.0	0.0	0.0	0.0
7	0.0	0.0	0.0	0.0	0.0	0.0	0.0
8	0.0	0.0	0.0	0.0	0.0	0.0	0.0
9	2.1	0.0	0.0	0.0	0.0	4.0	1.7
10	0.0	0.0	0.0	0.0	0.0	0.0	0.0
11	3.6	0.0	0.0	0.0	0.0	1.6	1.4
12	0.0	0.0	0.0	0.0	0.0	0.0	0.0
13	0.0	0.0	0.0	0.0	0.0	0.0	0.0
14	1.1	0.0	0.0	0.0	0.0	1.3	0.7
15	0.0	0.0	0.0	0.0	0.0	0.0	0.0
16	0.0	0.0	0.0	0.0	0.0	0.0	0.0

Adjusted to remove furntiure, DIYm, dom appliances and TVs from Colindale DC and add to Silk Bridge Retail Park

TEMPLE FORTUNE DISTRICT CENTRE

Expenditure Weighting:	Clothing & Footwear 851	Furniture Floor Cov. 409	DIY & Dec. Goods 219	Domestic App 367	TV, Hi Fi Radio 452	Personal & Luxury 886	**WEIGHTED** 3184
Zone	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	0.0	0.0	0.0	0.0	0.0	0	0.0
2	0.0	0.0	0.0	0.0	0.0	0.0	0.0
3	0.0	0.0	0.0	0.0	0.0	0.0	0.0
4	0.0	0.0	0.0	0.0	0.0	0.0	0.0
5	0.0	0.0	0.0	0.0	0.0	0.0	0.0
6	0.0	0.0	0.0	0.0	0.0	0.0	0.0
7	2.2	0.0	1.5	7.7	0.0	7.4	3.6
8	0.0	0.0	0.0	0.0	0.0	0.0	0.0
9	0.0	0.0	0.0	0.0	0.0	0.0	0.0
10	1.1	1.3	4.7	3.6	0.0	1.4	1.6
11	0.0	0.0	0.0	0.0	0.0	0.0	0.0
12	0.0	0.0	0.0	0.0	0.0	0.0	0.0
13	0.0	0.0	0.0	0.0	0.0	0.0	0.0
14	0.0	0.0	0.0	0.0	0.0	0.0	0.0
15	0.0	0.0	0.0	0.0	0.0	0.0	0.0
16	0.0	0.0	0.0	0.0	0.0	0.0	0.0

BURNT OAK DISTRICT CENTRE

Expenditure Weighting:	Clothing & Footwear 851	Furniture Floor Cov. 409	DIY & Dec. Goods 219	Domestic App 367	TV, Hi Fi Radio 452	Personal & Luxury 886	**WEIGHTED** 3184
Zone	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	0.0	0.0	0.0	0.0	0.0	0	0.0
2	0.0	0.0	0.0	0.0	0.0	0.0	0.0
3	0.0	0.0	0.0	0.0	0.0	0.0	0.0
4	0.0	0.0	0.0	0.0	0.0	0.0	0.0
5	0.0	0.0	0.0	0.0	0.0	0.0	0.0
6	0.0	0.0	0.0	0.0	0.0	0.0	0.0
7	1.1	0.0	0.0	0.0	0.0	0.0	0.3
8	1.0	0.0	0.0	0.0	0.0	0.0	0.3
9	3.2	1.5	5.1	0.0	0.0	5.3	2.9
10	2.1	0.0	0.0	0.0	0.0	0.0	0.6
11	0.0	1.5	1.5	1.5	0.0	0.0	0.5
12	0.0	1.4	0.0	0.0	0.0	0.0	0.2
13	0.0	0.0	0.0	0.0	0.0	0.0	0.0
14	0.0	0.0	0.0	0.0	0.0	0.0	0.0
15	0.0	0.0	0.0	0.0	0.0	0.0	0.0
16	0.0	0.0	0.0	0.0	0.0	0.0	0.0

CRICKLEWOOD DISTRICT CENTRE

Expenditure Weighting:	Clothing & Footwear 851	Furniture Floor Cov. 409	DIY & Dec. Goods 219	Domestic App 367	TV, Hi Fi Radio 452	Personal & Luxury 886	**WEIGHTED** 3184
Zone	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	0.0	0.0	0.0	0.0	0.0	0	0.0
2	0.0	0.0	0.0	0.0	1.4	0.0	0.2
3	0.0	0.0	0.0	0.0	0.0	0.0	0.0
4	0.0	0.0	0.0	1.3	1.5	0.0	0.4
5	0.0	0.0	0.0	0.0	0.0	0.0	0.0
6	0.0	0.0	0.0	0.0	0.0	0.0	0.0
7	1.1	0.0	0.0	1.3	4.6	0.0	1.1
8	0.0	0.0	0.0	0.0	0.0	0.0	0.0
9	0.0	0.0	0.0	0.0	0.0	0.0	0.0
10	0.0	1.3	0.0	1.2	0.0	0.0	0.3
11	4.8	6.1	0.0	7.2	7.0	4.8	5.2
12	0.0	0.0	0.0	0.0	0.0	0.0	0.0
13	0.0	0.0	0.0	0.0	0.0	0.0	0.0
14	0.0	1.7	0.0	1.2	1.4	0.0	0.6
15	0.0	3.8	0.0	5.2	1.4	1.4	1.7
16	0.0	0.0	0.0	0.0	0.0	0.0	0.0

Removed market share for DIY and added to Broadway Retail Park (B&Q)

NORTH FINCHLEY DISTRICT CENTRE

Expenditure Weighting:	Clothing & Footwear 851	Furniture Floor Cov. 409	DIY & Dec. Goods 219	Domestic App 367	TV, Hi Fi Radio 452	Personal & Luxury 886	**WEIGHTED** 3184
Zone	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	2.1	5.9	0.0	5.1	4.0	1.4	2.9
2	3.3	3.1	0.0	6.3	4.2	7.0	4.6
3	11.8	9.1	0.0	16.9	12.0	19.3	13.3
4	2.2	7.8	0.0	11.3	4.5	9.9	6.3
5	8.8	7.7	0.0	15.5	7.8	12.5	9.7
6	3.1	1.3	0.0	6.9	4.9	9.0	5.0
7	0.0	5.8	0.0	11.5	3.1	4.9	3.9
8	0.0	0.0	0.0	0.0	0.0	1.3	0.4
9	1.1	0.0	0.0	3.9	1.3	2.7	1.7
10	0.0	2.7	0.0	2.4	2.6	0.0	1.0
11	0.0	0.0	0.0	0.0	0.0	0.0	0.0
12	0.0	0.0	0.0	0.0	0.0	0.0	0.0
13	0.0	0.0	0.0	3.7	0.0	1.3	0.8
14	0.0	0.0	0.0	0.0	0.0	0.0	0.0
15	0.0	1.3	0.0	0.0	0.0	1.4	0.6
16	0.0	3.2	0.0	4.1	3.2	2.7	2.1

Adjusted to remove DIY and added to Homebase North Finchley

LB BARNET
BOROUGH-WIDE TOWN CENTRES STUDY 2008

NEW BARNET DISTRICT CENTRE

Expenditure Weighting:	Clothing & Footwear 851	Furniture Floor Cov. 409	DIY & Dec. Goods 219	Domestic App 367	TV, Hi Fi Radio 452	Personal & Luxury 886	**WEIGHTED** 3184
Zone	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	0.0	0.0	0.0	0.0	0.0	0.0	0.0
2	2.2	0.4	0.3	0.3	1.1	2.1	1.4
3	0.0	1.3	0.0	1.2	1.2	0.0	0.5
4	0.0	3.1	0.0	0.0	0.0	0.0	0.4
5	0.0	0.0	0.0	0.0	0.0	0.0	0.0
6	2.1	1.3	1.2	1.2	0.0	0.0	0.9
7	1.1	1.5	0.0	1.3	0.0	0.0	0.6
8	0.0	0.0	0.0	0.0	0.0	0.0	0.0
9	0.0	0.0	0.0	0.0	1.3	0.0	0.2
10	0.0	1.3	0.0	0.0	0.0	0.0	0.2
11	1.2	0.0	0.0	0.0	1.4	0.0	0.5
12	0.0	0.0	0.0	0.0	0.0	0.0	0.0
13	1.2	0.0	2.8	1.2	0.7	0.0	0.7
14	0.0	0.0	0.0	0.0	0.0	0.0	0.0
15	0.0	0.0	0.0	0.0	0.0	0.0	0.0
16	0.0	0.0	0.0	0.0	0.0	0.0	0.0

Adjusted added 100% zone 1 to Chipping Barnet, 75% zone 2, 50% zone 3 and 50% of zone 13

WHETSTONE DISTRICT CENTRE

Expenditure Weighting:	Clothing & Footwear 851	Furniture Floor Cov. 409	DIY & Dec. Goods 219	Domestic App 367	TV, Hi Fi Radio 452	Personal & Luxury 886	**WEIGHTED** 3184
Zone	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	1.1	2.9	0.0	1.3	1.3	1.4	1.4
2	0.0	3.1	0.0	3.8	0.0	2.8	1.6
3	0.0	1.3	0.0	1.2	1.2	3.6	1.5
4	0.0	1.6	0.0	0.0	0.0	2.8	1.0
5	0.0	1.5	0.0	0.0	0.0	0.0	0.2
6	0.0	0.0	0.0	0.0	1.2	1.3	0.5
7	0.0	0.0	0.0	0.0	0.0	0.0	0.0
8	0.0	0.0	0.0	1.2	0.0	0.0	0.1
9	0.0	0.0	0.0	0.0	0.0	0.0	0.0
10	0.0	0.0	0.0	0.0	0.0	0.0	0.0
11	0.0	0.0	0.0	0.0	0.0	0.0	0.0
12	0.0	0.0	0.0	0.0	0.0	0.0	0.0
13	0.0	0.0	0.0	0.0	0.0	0.0	0.0
14	0.0	0.0	0.0	1.2	0.0	0.0	0.1
15	0.0	0.0	0.0	0.0	0.0	0.0	0.0
16	0.0	0.0	0.0	0.0	0.0	0.0	0.0

Adjusted to remove DIY and added to B&Q Whetstone

LB BARNET

BOROUGH-WIDE TOWN CENTRES STUDY 2008

HENDON CENTRAL DISTRICT CENTRE

Expenditure Weighting:	Clothing & Footwear 851	Furniture Floor Cov. 409	DIY & Dec. Goods 219	Domestic App 367	TV, Hi Fi Radio 452	Personal & Luxury 886	**WEIGHTED** 3184
Zone	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	0.0	0.0	0.0	0.0	0.0	0	0.0
2	0.0	0.0	0.0	0.0	0.0	0.0	0.0
3	0.0	0.0	0.0	0.0	0.0	0.0	0.0
4	2.2	1.6	1.4	0.0	1.5	0.0	1.1
5	0.0	0.0	0.0	0.0	0.0	0.0	0.0
6	0.0	0.0	0.0	0.0	0.0	0.0	0.0
7	0.0	0.0	0.0	0.0	0.0	0.0	0.0
8	1.0	1.3	3.7	0.0	1.2	0.0	0.9
9	0.0	1.5	3.8	2.6	2.5	0.0	1.1
10	1.1	2.7	3.1	1.2	1.3	0.0	1.2
11	1.2	4.5	6.1	14.5	9.9	4.8	5.7
12	0.0	0.0	0.0	0.0	0.0	0.0	0.0
13	0.0	0.0	0.0	0.0	0.0	0.0	0.0
14	0.0	0.0	1.5	0.0	1.4	0.0	0.3
15	0.0	0.0	0.0	0.0	0.0	0.0	0.0
16	0.0	0.0	0.0	0.0	0.0	0.0	0.0

GOLDERS GREEN DISTRICT CENTRE

Expenditure Weighting:	Clothing & Footwear 851	Furniture Floor Cov. 409	DIY & Dec. Goods 219	Domestic App 367	TV, Hi Fi Radio 452	Personal & Luxury 886	**WEIGHTED** 3184
Zone	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	0.0	0.0	0.0	0.0	0.0	0	0.0
2	0.0	0.0	0.0	0.0	0.0	0.0	0.0
3	0.0	0.0	0.0	0.0	0.0	0.0	0.0
4	1.1	0.0	0.0	0.0	0.0	0.0	0.3
5	0.0	0.0	0.0	0.0	0.0	0.0	0.0
6	0.0	0.0	0.0	0.0	0.0	0.0	0.0
7	0.0	0.0	0.0	0.0	0.0	1.2	0.3
8	1.0	0.0	0.0	0.0	0.0	0.0	0.3
9	0.0	0.0	0.0	0.0	0.0	1.3	0.4
10	2.1	2.7	4.7	2.4	1.3	1.4	2.1
11	0.0	0.0	0.0	0.0	0.0	0.0	0.0
12	0.0	0.0	0.0	0.0	0.0	0.0	0.0
13	0.0	0.0	0.0	0.0	0.0	0.0	0.0
14	0.0	0.0	0.0	0.0	0.0	0.0	0.0
15	0.0	0.0	0.0	0.0	0.0	1.4	0.4
16	0.0	0.0	0.0	0.0	0.0	0.0	0.0

APPENDIX 3

CAPACITY PROJECTIONS: CONVENIENCE GOODS

LB BARNET
BOROUGH-WIDE TOWN CENTRES STUDY 2008

TABLE 1
SURVEY AREA POPULATION FORECASTS

Catchment Zone	Postcode Sector Groupings	2008	2011	2016	2021	2026
1	EN5 2/3/4/5	30,345	**30,618**	**31,812**	**31,939**	**32,163**
2	EN5 1, EN4 8/9, N20 8/9	36,134	**36,604**	**36,860**	**37,376**	**38,273**
3	N20 0, N11 1/2/3, N12 0/8/9	58,903	**58,667**	**58,609**	**58,374**	**59,133**
4	N12 7, NW7 1/2, NW4 1	25,692	**26,951**	**31,560**	**32,349**	**30,052**
5	N3, 1/2/3	25,840	**25,685**	**25,402**	**25,860**	**23,843**
6	N2 8/9, N10 1/2/3	38,773	**38,773**	**38,153**	**38,038**	**36,479**
7	N2 0, NW11 6, N6 4	20,651	**20,486**	**20,158**	**19,936**	**18,182**
8	NW7 3/4, HA8 7/8/9	41,142	**41,924**	**42,385**	**43,105**	**46,856**
9	HA8 0/5, NW9 0/5/6, NW4 4	59,034	**65,174**	**73,320**	**74,200**	**79,765**
10	NW4 2, NW3 7, NW11 0/7/8/9	38,235	**38,579**	**37,615**	**40,022**	**38,621**
11	NW4 3, NW2 1/6/7, NW9 7/8	50,861	**57,066**	**76,126**	**78,638**	**80,290**
12	WD6 1/2/3/4/5	34,584	35,141	36,240	37,688	38,983
13	EN4 0, N14 4/5/6/7	33,500	33,880	34,431	35,003	35,615
14	HA7 1/2/4, HA8 6, NW9 9	41,962	41,863	41,998	42,365	42,950
15	NW2 2/3/4/5, NW10 1, NW6 1/2/7, NW3 6	72,751	74,819	77,360	79,196	80,989
16	N6 5/6, N19 5, NW3 1/2/4/5, NW5 1/2	76,891	79,595	82,954	85,522	87,839
TOTAL		**685,298**	**705,824**	**744,982**	**759,612**	**770,032**

SOURCE: Experian Business Solutions, April 2008

TABLE 1A
POPULATION GROWTH RATES

2008-2011 (%)	2011-2016 (%)	2016-2021 (%)	2021-2026 (%)
0.9	3.9	0.4	0.7
1.3	0.7	1.4	2.4
-0.4	-0.1	-0.4	1.3
4.9	17.1	2.5	-7.1
-0.6	-1.1	1.8	-7.8
0.0	-1.6	-0.3	-4.1
-0.8	-1.6	-1.1	-8.8
1.9	1.1	1.7	8.7
10.4	12.5	1.2	7.5
0.9	-2.5	6.4	-3.5
12.2	33.4	3.3	2.1
1.6	3.1	4.0	3.4
1.1	1.6	1.7	1.7
-0.2	0.3	0.9	1.4
2.8	3.4	2.4	2.3
3.5	4.2	3.1	2.7
3.0	5.5	2.0	1.4

LB BARNET
BOROUGH-WIDE TOWN CENTRES STUDY 2008

TABLE 2
CONVENIENCE GOODS RETAIL EXPENDITURE FORECASTS PER CAPITA (2006 PRICES)

GROWTH IN PER CAPITA RETAIL EXPENDITURE: 0.30 %pa 2006-2026

ZONE	2006	Minus SFT at 3.4%	2008	Minus SFT at 5.9%	2011	Minus SFT at 7.3%	2016	Minus SFT at 8.1%	2021	Minus SFT at 8.1%	2026	Minus SFT at 8.1%
1	1,785	1,724	1,796	1,690	1,812	1,680	1,839	1,690	1,867	1,716	1,895	1,742
2	1,817	1,755	1,828	1,720	1,844	1,710	1,872	1,721	1,901	1,747	1,929	1,773
3	1,744	1,685	1,754	1,651	1,770	1,641	1,797	1,651	1,824	1,676	1,852	1,702
4	1,754	1,694	1,765	1,660	1,780	1,650	1,807	1,661	1,835	1,686	1,862	1,711
5	1,898	1,833	1,909	1,797	1,927	1,786	1,956	1,797	1,985	1,824	2,015	1,852
6	1,895	1,831	1,906	1,794	1,924	1,783	1,953	1,794	1,982	1,822	2,012	1,849
7	1,972	1,905	1,984	1,867	2,002	1,856	2,032	1,867	2,063	1,896	2,094	1,924
8	1,692	1,634	1,702	1,602	1,718	1,592	1,743	1,602	1,770	1,626	1,796	1,651
9	1,462	1,412	1,471	1,384	1,484	1,376	1,506	1,384	1,529	1,405	1,552	1,427
10	1,828	1,766	1,839	1,730	1,856	1,720	1,884	1,731	1,912	1,757	1,941	1,784
11	1,524	1,472	1,533	1,443	1,547	1,434	1,570	1,443	1,594	1,465	1,618	1,487
12	1,668	1,611	1,678	1,579	1,693	1,570	1,719	1,580	1,745	1,603	1,771	1,628
13	1,757	1,697	1,768	1,663	1,784	1,653	1,810	1,664	1,838	1,689	1,865	1,714
14	1,569	1,516	1,578	1,485	1,593	1,476	1,617	1,486	1,641	1,508	1,666	1,531
15	1,694	1,636	1,704	1,604	1,720	1,594	1,746	1,604	1,772	1,628	1,799	1,653
16	1,971	1,904	1,983	1,866	2,001	1,855	2,031	1,866	2,062	1,895	2,093	1,923

Source: Experian Business Strategies September 2008

LB BARNET
BOROUGH-WIDE TOWN CENTRES STUDY 2008

TABLE 3
SURVEY AREA - TOTAL CONVENIENCE GOODS RETAIL EXPENDITURE FORECASTS

ZONE	2008	2011	2016	2021	2026
	(£000)	(£000)	(£000)	(£000)	(£000)
1	51,276	51,428	53,772	54,802	56,018
2	62,153	62,584	63,421	65,280	67,855
3	97,247	96,278	96,791	97,858	100,626
4	42,660	44,482	52,419	54,540	51,432
5	46,428	45,873	45,656	47,179	44,155
6	69,555	69,139	68,463	69,288	67,450
7	38,551	38,014	37,643	37,790	34,985
8	65,899	66,749	67,910	70,107	77,356
9	81,704	89,661	101,507	104,275	113,787
10	66,165	66,361	65,112	70,324	68,887
11	73,377	81,837	109,861	115,199	119,393
12	54,609	55,156	57,241	60,427	63,446
13	55,720	56,014	57,286	59,116	61,057
14	62,326	61,807	62,399	63,894	65,754
15	116,666	119,264	124,095	128,957	133,867
16	143,468	147,624	154,828	162,029	168,931
TOTAL	**1,127,803**	**1,152,272**	**1,218,403**	**1,261,066**	**1,295,000**

Source: Tables 1 & 2

LB BARNET
BOROUGH-WIDE TOWN CENTRES STUDY 2008

BRENT CROSS REGIONAL SHOPPING CENTRE

TABLE 4
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

Catchment Zone	Waitrose					Marks and Spencer Food Hall					TOTAL				
	2008	2011	2016	2021	2026	2008	2011	2016	2021	2026	2008	2011	2016	2021	2026
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
3	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
4	3	3	3	3	3	0	0	0	0	0	3	3	3	3	3
5	0	0	0	0	0	1	1	1	1	1	1	1	1	1	1
6	0	0	0	0	0	1	1	1	1	1	1	1	1	1	1
7	3	3	3	3	3	0	0	0	0	0	3	3	3	3	3
8	1	1	1	1	1	0	0	0	0	0	1	1	1	1	1
9	2	2	2	2	2	0	0	0	0	0	2	2	2	2	2
10	3	3	3	3	3	1	1	1	1	1	4	4	4	4	4
11	9	9	9	9	9	2	2	2	2	2	11	11	11	11	11
12	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
13	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
14	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
15	2	2	2	2	2	1	1	1	1	1	4	4	4	4	4
16	3	3	3	3	3	0	0	0	0	0	3	3	3	3	3

SOURCE: Household Survey, September 2008

TABLE 5
CONVENIENCE GOODS ALLOCATION - SPEND (£) 2006 PRICES

Catchment Zone	Waitrose					Marks and Spencer Food Hall					TOTAL				
	2008	2011	2016	2021	2026	2008	2011	2016	2021	2026	2008	2011	2016	2021	2026
	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)
1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
3	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
4	1,216	1,268	1,494	1,554	1,466	0	0	0	0	0	1,216	1,268	1,494	1,554	1,466
5	0	0	0	0	0	522	516	514	531	497	522	516	514	531	497
6	0	0	0	0	0	522	519	513	520	506	522	519	513	520	506
7	1,340	1,321	1,308	1,313	1,216	0	0	0	0	0	1,340	1,321	1,308	1,313	1,216
8	939	951	968	999	1,102	0	0	0	0	0	939	951	968	999	1,102
9	1,838	2,017	2,284	2,346	2,560	0	0	0	0	0	1,838	2,017	2,284	2,346	2,560
10	2,200	2,207	2,165	2,338	2,290	496	498	488	527	517	2,696	2,704	2,653	2,866	2,807
11	6,787	7,570	10,162	10,656	11,044	1,266	1,412	1,895	1,987	2,060	8,053	8,982	12,057	12,643	13,103
12	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
13	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
14	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
15	2,800	2,862	2,978	3,095	3,213	1,342	1,372	1,427	1,483	1,539	4,142	4,234	4,405	4,578	4,752
16	4,340	4,466	4,684	4,901	5,110	430	443	464	486	507	4,770	4,908	5,148	5,387	5,617
TOTALS	**21,460**	**22,662**	**26,043**	**27,203**	**28,001**	**4,578**	**4,758**	**5,302**	**5,534**	**5,625**	**26,038**	**27,420**	**31,345**	**32,737**	**33,626**

SOURCE: Tables 3 & 4

LB BARNET
BOROUGH-WIDE TOWN CENTRES STUDY 2008

EDGWARE MAJOR CENTRE

TABLE 6
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

Catchment Zone	Sainsburys, Broadwalk Centre					Marks and Spencer Food Hall Broadwalk Centre					Other Stores in Edgware					TOTAL				
	2008	2011	2016	2021	2026	2008	2011	2016	2021	2026	2008	2011	2016	2021	2026	2008	2011	2016	2021	2026
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
3	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
4	5	5	5	5	5	0	0	0	0	0	2	2	2	2	2	7	7	7	7	7
5	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
6	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
7	0	0	0	0	0	1	1	1	1	1	1	1	1	1	1	2	2	2	2	2
8	29	29	29	29	29	3	3	3	3	3	0	0	0	0	0	32	32	32	32	32
9	8	8	8	8	8	0	0	0	0	0	0	0	0	0	0	9	9	9	9	9
10	0	0	0	0	0	0	0	0	0	0	6	6	6	6	6	6	6	6	6	6
11	0	0	0	0	0	0	0	0	0	0	8	8	8	8	8	9	9	9	9	9
12	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
13	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
14	12	12	12	12	12	2	2	2	2	2	0	0	0	0	0	14	14	14	14	14
15	1	1	1	1	1	0	0	0	0	0	2	2	2	2	2	3	3	3	3	3
16	2	2	2	2	2	0	0	0	0	0	0	0	0	0	0	2	2	2	2	2

SOURCE: Household Survey, September 2008

TABLE 7
CONVENIENCE GOODS ALLOCATION - SPEND (£) 2006 PRICES

Catchment Zone	Sainsburys, Broadwalk Centre					Marks and Spencer Food Hall Broadwalk Centre					Other Stores in Edgware					TOTAL				
	2008	2011	2016	2021	2026	2008	2011	2016	2021	2026	2008	2011	2016	2021	2026	2008	2011	2016	2021	2026
	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)
1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
3	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
4	1,973	2,057	2,424	2,522	2,379	0	0	0	0	0	896	934	1,101	1,145	1,080	2,869	2,991	3,525	3,668	3,459
5	0	0	0	0	0	0	0	0	0	0	174	172	171	177	166	174	172	171	177	166
6	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
7	0	0	0	0	0	318	314	311	312	289	318	314	311	312	289	636	627	621	624	577
8	19,308	19,557	19,898	20,541	22,665	1,960	1,986	2,020	2,086	2,301	0	0	0	0	0	21,269	21,543	21,918	22,627	24,967
9	6,761	7,419	8,400	8,629	9,416	0	0	0	0	0	266	291	330	339	370	7,027	7,711	8,730	8,968	9,786
10	0	0	0	0	0	0	0	0	0	0	4,235	4,247	4,167	4,501	4,409	4,235	4,247	4,167	4,501	4,409
11	294	327	439	461	478	0	0	0	0	0	6,200	6,915	9,283	9,734	10,089	6,494	7,243	9,723	10,195	10,566
12	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
13	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
14	7,261	7,201	7,269	7,444	7,660	1,356	1,344	1,357	1,390	1,430	0	0	0	0	0	8,617	8,545	8,627	8,833	9,090
15	962	984	1,024	1,064	1,104	0	0	0	0	0	2,800	2,862	2,978	3,095	3,213	3,762	3,846	4,002	4,159	4,317
16	2,690	2,768	2,903	3,038	3,167	0	0	0	0	0	0	0	0	0	0	2,690	2,768	2,903	3,038	3,167
TOTALS	**39,249**	**40,314**	**42,358**	**43,699**	**46,870**	**3,634**	**3,644**	**3,688**	**3,787**	**4,020**	**14,888**	**15,736**	**18,341**	**19,303**	**19,614**	**57,772**	**59,693**	**64,387**	**66,789**	**70,504**

SOURCE: Tables 3 & 6

LB BARNET
BOROUGH-WIDE TOWN CENTRES STUDY 2008

BRENT STREET DISTRICT CENTRE

TABLE 8
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

Catchment Zone	Tesco					Other Stores in Brent Street					TOTAL				
	2008	2011	2016	2021	2026	2008	2011	2016	2021	2026	2008	2011	2016	2021	2026
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
3	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
4	5	5	5	5	5	1	1	1	1	1	6	6	6	6	6
5	1	1	1	1	1	0	0	0	0	0	1	1	1	1	1
6	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
7	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
8	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
9	1	1	1	1	1	0	0	0	0	0	1	1	1	1	1
10	11	11	11	11	11	0	0	0	0	0	11	11	11	11	11
11	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
12	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
13	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
14	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
15	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
16	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

SOURCE: Household Survey, September 2008

TABLE 9
CONVENIENCE GOODS ALLOCATION - SPEND (£) 2006 PRICES

Catchment Zone	Tesco					Other Stores In Brent Street					TOTAL				
	2008	2011	2016	2021	2026	2008	2011	2016	2021	2026	2008	2011	2016	2021	2026
	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)
1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
3	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
4	2,144	2,235	2,634	2,741	2,584	373	389	459	477	450	2,517	2,624	3,093	3,218	3,034
5	348	344	342	354	331	0	0	0	0	0	348	344	342	354	331
6	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
7	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
8	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
9	878	964	1,091	1,121	1,223	0	0	0	0	0	878	964	1,091	1,121	1,223
10	7,013	7,034	6,902	7,454	7,302	0	0	0	0	0	7,013	7,034	6,902	7,454	7,302
11	294	327	439	461	478	0	0	0	0	0	294	327	439	461	478
12	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
13	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
14	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
15	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
16	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
TOTALS	**10,677**	**10,905**	**11,409**	**12,131**	**11,918**	**373**	**389**	**459**	**477**	**450**	**11,050**	**11,294**	**11,868**	**12,608**	**12,368**

SOURCE: Tables 3 & 8

LB BARNET
BOROUGH-WIDE TOWN CENTRES STUDY 2008

CHIPPING BARNET DISTRICT CENTRE

TABLE 10
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

Catchment Zone	Waitrose, The Spires					Other Stores in chipping Barnet					TOTAL				
	2008	2011	2016	2021	2026	2008	2011	2016	2021	2026	2008	2011	2016	2021	2026
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	24	24	24	24	24	3	3	3	3	3	27	27	27	27	27
2	3	3	3	3	3	0	0	0	0	0	3	3	3	3	3
3	0	0	0	0	0	0	0	0	0	0	1	1	1	1	1
4	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
5	1	1	1	1	1	0	0	0	0	0	1	1	1	1	1
6	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
7	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
8	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
9	0	0	0	0	0	2	2	2	2	2	2	2	2	2	2
10	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
11	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
12	0	0	0	0	0	1	1	1	1	1	1	1	1	1	1
13	3	3	3	3	3	0	0	0	0	0	3	3	3	3	3
14	0	0	0	0	0	1	1	1	1	1	1	1	1	1	1
15	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
16	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

SOURCE: Household Survey, September 2008

TABLE 11
CONVENIENCE GOODS ALLOCATION - SPEND (£) 2006 PRICES

Catchment Zone	Waitrose, The Spires					Other Stores in Chipping Barnet					TOTAL				
	2008	2011	2016	2021	2026	2008	2011	2016	2021	2026	2008	2011	2016	2021	2026
	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)
1	12,435	12,471	13,040	13,289	13,584	1,602	1,607	1,680	1,713	1,751	14,037	14,078	14,720	15,002	15,335
2	2,113	2,128	2,156	2,220	2,307	0	0	0	0	0	2,113	2,128	2,156	2,220	2,307
3	292	289	290	294	302	292	289	290	294	302	583	578	581	587	604
4	128	133	157	164	154	0	0	0	0	0	128	133	157	164	154
5	348	344	342	354	331	0	0	0	0	0	348	344	342	354	331
6	0	0	0	0	0	209	207	205	208	202	209	207	205	208	202
7	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
8	198	200	204	210	232	0	0	0	0	0	198	200	204	210	232
9	0	0	0	0	0	1,328	1,457	1,649	1,694	1,849	1,328	1,457	1,649	1,694	1,849
10	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
11	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
12	0	0	0	0	0	410	414	429	453	476	410	414	429	453	476
13	1,602	1,610	1,647	1,700	1,755	0	0	0	0	0	1,602	1,610	1,647	1,700	1,755
14	0	0	0	0	0	467	464	468	479	493	467	464	468	479	493
15	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
16	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
TOTALS	**17,115**	**17,176**	**17,837**	**18,230**	**18,666**	**4,307**	**4,438**	**4,723**	**4,841**	**5,073**	**21,423**	**21,614**	**22,560**	**23,071**	**23,739**

SOURCE: Tables 3 & 10

LB BARNET
BOROUGH-WIDE TOWN CENTRES STUDY 2008

CHURCH END, FINCHLEY DISTRICT CENTRE

TABLE 12
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

Catchment Zone	Tesco Metro, Ballards Lane					Other Stores in Finchley Church End					TOTAL				
	2008	2011	2016	2021	2026	2008	2011	2016	2021	2026	2008	2011	2016	2021	2026
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
3	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
4	16	16	16	16	16	0	0	0	0	0	16	16	16	16	16
5	34	34	34	34	34	0	0	0	0	0	34	34	34	34	34
6	5	5	5	5	5	0	0	0	0	0	5	5	5	5	5
7	3	3	3	3	3	0	0	0	0	0	3	3	3	3	3
8	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
10	1	1	1	1	1	0	0	0	0	0	1	1	1	1	1
11	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
12	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
13	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
14	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
15	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
16	1	1	1	1	1	0	0	0	0	0	1	1	1	1	1

SOURCE: Household Survey, September 2008

TABLE 13
CONVENIENCE GOODS ALLOCATION - SPEND (£) 2006 PRICES

Catchment Zone	Tesco Metro, Ballards Lane					Other Stores in Finchley Church End					TOTAL				
	2008	2011	2016	2021	2026	2008	2011	2016	2021	2026	2008	2011	2016	2021	2026
	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)
1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
3	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
4	6,772	7,062	8,321	8,658	8,165	0	0	0	0	0	6,772	7,062	8,321	8,658	8,165
5	15,669	15,482	15,409	15,923	14,902	174	172	171	177	166	15,844	15,654	15,580	16,100	15,068
6	3,704	3,682	3,646	3,690	3,592	0	0	0	0	0	3,704	3,682	3,646	3,690	3,592
7	1,340	1,321	1,308	1,313	1,216	0	0	0	0	0	1,340	1,321	1,308	1,313	1,216
8	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
10	496	498	488	527	517	0	0	0	0	0	496	498	488	527	517
11	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
12	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
13	167	168	172	177	183	0	0	0	0	0	167	168	172	177	183
14	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
15	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
16	1,184	1,218	1,277	1,337	1,394	0	0	0	0	0	1,184	1,218	1,277	1,337	1,394
TOTALS	**29,332**	**29,430**	**30,622**	**31,625**	**29,968**	**174**	**172**	**171**	**177**	**166**	**29,506**	**29,602**	**30,793**	**31,802**	**30,134**

SOURCE: Tables 3 & 12

LB BARNET
BOROUGH-WIDE TOWN CENTRES STUDY 2008

EAST FINCHLEY DISTRICT CENTRE

TABLE 14
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

Catchment Zone	EAST FINCHLEY 2008 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)
1	0	0	0	0	0
2	0	0	0	0	0
3	0	0	0	0	0
4	0	0	0	0	0
5	0	0	0	0	0
6	4	4	4	4	4
7	3	3	3	3	3
8	0	0	0	0	0
9	0	0	0	0	0
10	0	0	0	0	0
11	0	0	0	0	0
12	0	0	0	0	0
13	0	0	0	0	0
14	0	0	0	0	0
15	0	0	0	0	0
16	0	0	0	0	0

SOURCE: Household Survey, September 2008

TABLE 15
CONVENIENCE GOODS ALLOCATION - SPEND (£) 2006 PRICES

Catchment Zone	EAST FINCHLEY 2008 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)
1	0	0	0	0	0
2	0	0	0	0	0
3	0	0	0	0	0
4	0	0	0	0	0
5	0	0	0	0	0
6	2,973	2,956	2,927	2,962	2,883
7	1,195	1,178	1,167	1,171	1,085
8	0	0	0	0	0
9	0	0	0	0	0
10	0	0	0	0	0
11	0	0	0	0	0
12	0	0	0	0	0
13	0	0	0	0	0
14	0	0	0	0	0
15	0	0	0	0	0
16	0	0	0	0	0
TOTALS	**4,169**	**4,134**	**4,094**	**4,134**	**3,968**

SOURCE: Tables 3 & 14

LB BARNET
BOROUGH-WIDE TOWN CENTRES STUDY 2008

MILL HILL DISTRICT CENTRE

TABLE 16
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

Catchment Zone	MILL HILL 2008 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)
1	0	0	0	0	0
2	0	0	0	0	0
3	0	0	0	0	0
4	1	1	1	1	1
5	1	1	1	1	1
6	0	0	0	0	0
7	0	0	0	0	0
8	2	2	2	2	2
9	0	0	0	0	0
10	0	0	0	0	0
11	0	0	0	0	0
12	0	0	0	0	0
13	0	0	0	0	0
14	0	0	0	0	0
15	0	0	0	0	0
16	0	0	0	0	0

SOURCE: Household Survey, September 2008

TABLE 17
CONVENIENCE GOODS ALLOCATION - SPEND (£) 2006 PRICES

Catchment Zone	MILL HILL 2008 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)
1	0	0	0	0	0
2	0	0	0	0	0
3	0	0	0	0	0
4	501	523	616	641	604
5	348	344	342	354	331
6	0	0	0	0	0
7	125	124	122	123	114
8	1,417	1,435	1,460	1,507	1,663
9	0	0	0	0	0
10	0	0	0	0	0
11	0	0	0	0	0
12	0	0	0	0	0
13	0	0	0	0	0
14	0	0	0	0	0
15	0	0	0	0	0
16	0	0	0	0	0
TOTALS	**2,392**	**2,425**	**2,541**	**2,625**	**2,712**

SOURCE: Tables 3 & 16

LB BARNET
BOROUGH-WIDE TOWN CENTRES STUDY 2008

COLINDALE DISTRICT CENTRE

TABLE 18
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

Catchment Zone	COLINDALE				
	2008	2011	2016	2021	2026
	(%)	(%)	(%)	(%)	(%)
1	0	0	0	0	0
2	0	0	0	0	0
3	0	0	0	0	0
4	0	0	0	0	0
5	0	0	0	0	0
6	0	0	0	0	0
7	0	0	0	0	0
8	0	0	0	0	0
9	1	1	1	1	1
10	0	0	0	0	0
11	0	0	0	0	0
12	0	0	0	0	0
13	0	0	0	0	0
14	0	0	0	0	0
15	0	0	0	0	0
16	0	0	0	0	0

SOURCE: Household Survey, September 2008

TABLE 19
CONVENIENCE GOODS ALLOCATION - SPEND (£) 2006 PRICES

Catchment Zone	COLINDALE				
	2008	2011	2016	2021	2026
	(£000)	(£000)	(£000)	(£000)	(£000)
1	0	0	0	0	0
2	0	0	0	0	0
3	0	0	0	0	0
4	0	0	0	0	0
5	0	0	0	0	0
6	0	0	0	0	0
7	0	0	0	0	0
8	0	0	0	0	0
9	1,062	1,166	1,320	1,356	1,479
10	0	0	0	0	0
11	294	327	439	461	478
12	0	0	0	0	0
13	0	0	0	0	0
14	0	0	0	0	0
15	0	0	0	0	0
16	0	0	0	0	0
TOTALS	**1,356**	**1,493**	**1,759**	**1,816**	**1,957**

SOURCE: Tables 3 & 18

LB BARNET
BOROUGH-WIDE TOWN CENTRES STUDY 2008

TEMPLE FORTUNE DISTRICT CENTRE

TABLE 20
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

Catchment Zone	Waitrose					Other Stores in Temple Fortune					TOTAL				
	2008	2011	2016	2021	2026	2008	2011	2016	2021	2026	2008	2011	2016	2021	2026
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
3	0	0	0	0	0	2	2	2	2	2	2	2	2	2	2
4	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
5	0	0	0	0	0	2	2	2	2	2	2	2	2	2	2
6	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
7	15	15	15	15	15	3	3	3	3	3	18	18	18	18	18
8	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
10	9	9	9	9	9	1	1	1	1	1	9	9	9	9	9
11	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
12	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
13	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
14	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
15	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
16	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

SOURCE: Household Survey, September 2008

TABLE 21
CONVENIENCE GOODS ALLOCATION - SPEND (£) 2006 PRICES

Catchment Zone	Waitrose					Other Stores in Temple Fortune					TOTAL				
	2008	2011	2016	2021	2026	2008	2011	2016	2021	2026	2008	2011	2016	2021	2026
	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)
1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
3	0	0	0	0	0	2,115	2,094	2,105	2,128	2,189	2,115	2,094	2,105	2,128	2,189
4	0	0	0	0	0	128	133	157	164	154	128	133	157	164	154
5	0	0	0	0	0	905	895	890	920	861	905	895	890	920	861
6	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
7	5,898	5,816	5,759	5,782	5,353	1,176	1,159	1,148	1,153	1,067	7,074	6,976	6,907	6,935	6,420
8	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
10	5,740	5,757	5,648	6,101	5,976	496	498	488	527	517	6,236	6,255	6,137	6,628	6,493
11	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
12	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
13	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
14	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
15	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
16	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
TOTALS	**11,638**	**11,573**	**11,408**	**11,883**	**11,329**	**4,820**	**4,779**	**4,789**	**4,892**	**4,788**	**16,459**	**16,352**	**16,197**	**16,775**	**16,116**

SOURCE: Tables 3 & 20

LB BARNET
BOROUGH-WIDE TOWN CENTRES STUDY 2008

BURNT OAK DISTRICT CENTRE

TABLE 22
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

Catchment Zone	Tesco					Other Stores in Burnt Oak					TOTAL				
	2008	2011	2016	2021	2026	2008	2011	2016	2021	2026	2008	2011	2016	2021	2026
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
3	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
4	1	1	1	1	1	0	0	0	0	0	1	1	1	1	1
5	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
6	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
7	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
8	1	1	1	1	1	1	1	1	1	1	2	2	2	2	2
9	7	7	7	7	7	3	3	3	3	3	10	10	10	10	10
10	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
11	0	0	0	0	0	2	2	2	2	2	2	2	2	2	2
12	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
13	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
14	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
15	0	0	0	0	0	1	1	1	1	1	1	1	1	1	1
16	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

SOURCE: Household Survey, September 2008

TABLE 23
CONVENIENCE GOODS ALLOCATION - SPEND (£) 2006 PRICES

Catchment Zone	Tesco					Other Stores in Burnt Oak					TOTAL				
	2008	2011	2016	2021	2026	2008	2011	2016	2021	2026	2008	2011	2016	2021	2026
	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)
1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
3	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
4	320	334	393	409	386	0	0	0	0	0	320	334	393	409	386
5	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
6	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
7	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
8	807	818	832	859	948	494	501	509	526	580	1,302	1,318	1,341	1,385	1,528
9	5,883	6,456	7,309	7,508	8,193	2,206	2,421	2,741	2,815	3,072	8,089	8,876	10,049	10,323	11,265
10	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
11	0	0	0	0	0	1,431	1,596	2,142	2,246	2,328	1,431	1,596	2,142	2,246	2,328
12	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
13	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
14	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
15	0	0	0	0	0	1,108	1,133	1,179	1,225	1,272	1,108	1,133	1,179	1,225	1,272
16	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
TOTALS	**7,010**	**7,607**	**8,534**	**8,776**	**9,526**	**5,239**	**5,650**	**6,571**	**6,813**	**7,252**	**12,249**	**13,257**	**15,105**	**15,588**	**16,778**

SOURCE: Tables 3 & 22

LB BARNET
BOROUGH-WIDE TOWN CENTRES STUDY 2008

CRICKLEWOOD DISTRICT CENTRE

TABLE 24
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

Catchment Zone	CRICKLEWOOD				
	2008 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)
1	0	0	0	0	0
2	0	0	0	0	0
3	0	0	0	0	0
4	0	0	0	0	0
5	0	0	0	0	0
6	0	0	0	0	0
7	0	0	0	0	0
8	0	0	0	0	0
9	0	0	0	0	0
10	0	0	0	0	0
11	2	2	2	2	2
12	0	0	0	0	0
13	0	0	0	0	0
14	0	0	0	0	0
15	2	2	2	2	2
16	0	0	0	0	0

SOURCE: Household Survey, September 2008

TABLE 25
CONVENIENCE GOODS ALLOCATION - SPEND (£) 2006 PRICES

Catchment Zone	CRICKLEWOOD				
	2008 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)
1	0	0	0	0	0
2	0	0	0	0	0
3	0	0	0	0	0
4	0	0	0	0	0
5	0	0	0	0	0
6	0	0	0	0	0
7	0	0	0	0	0
8	0	0	0	0	0
9	0	0	0	0	0
10	0	0	0	0	0
11	1,266	1,412	1,895	1,987	2,060
12	0	0	0	0	0
13	0	0	0	0	0
14	0	0	0	0	0
15	2,829	2,892	3,009	3,127	3,246
16	0	0	0	0	0
TOTALS	**4,095**	**4,304**	**4,904**	**5,114**	**5,306**

SOURCE: Tables 3 & 24

LB BARNET
BOROUGH-WIDE TOWN CENTRES STUDY 2008

NORTH FINCHLEY DISTRICT CENTRE

TABLE 26
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

Catchment Zone	Sainsburys					Other Stores in North Finchley					TOTAL				
	2008 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)	2008 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)	2008 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)
1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
2	3	3	3	3	3	1	1	1	1	1	4	4	4	4	4
3	20	20	20	20	20	0	0	0	0	0	20	20	20	20	20
4	5	5	5	5	5	0	0	0	0	0	5	5	5	5	5
5	3	3	3	3	3	0	0	0	0	0	3	3	3	3	3
6	2	2	2	2	2	0	0	0	0	0	2	2	2	2	2
7	4	4	4	4	4	0	0	0	0	0	4	4	4	4	4
8	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
9	1	1	1	1	1	0	0	0	0	0	1	1	1	1	1
10	1	1	1	1	1	0	0	0	0	0	1	1	1	1	1
11	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
12	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
13	1	1	1	1	1	0	0	0	0	0	1	1	1	1	1
14	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
15	2	2	2	2	2	0	0	0	0	0	2	2	2	2	2
16	1	1	1	1	1	0	0	0	0	0	1	1	1	1	1

SOURCE: Household Survey, September 2008

TABLE 27
CONVENIENCE GOODS ALLOCATION - SPEND (£) 2006 PRICES

Catchment Zone	Sainsburys					Other Stores in North Finchley					TOTAL				
	2008 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)	2008 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)	2008 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)
1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
2	2,113	2,128	2,156	2,220	2,307	420	422	428	441	458	2,533	2,550	2,584	2,660	2,765
3	19,206	19,015	19,116	19,327	19,874	0	0	0	0	0	19,206	19,015	19,116	19,327	19,874
4	2,101	2,191	2,582	2,686	2,533	0	0	0	0	0	2,101	2,191	2,582	2,686	2,533
5	1,254	1,239	1,233	1,274	1,192	0	0	0	0	0	1,254	1,239	1,233	1,274	1,192
6	1,721	1,711	1,694	1,715	1,669	0	0	0	0	0	1,721	1,711	1,694	1,715	1,669
7	1,658	1,635	1,619	1,625	1,504	0	0	0	0	0	1,658	1,635	1,619	1,625	1,504
8	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
9	878	964	1,091	1,121	1,223	0	0	0	0	0	878	964	1,091	1,121	1,223
10	711	713	700	756	741	0	0	0	0	0	711	713	700	756	741
11	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
12	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
13	585	588	601	621	641	0	0	0	0	0	585	588	601	621	641
14	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
15	2,683	2,743	2,854	2,966	3,079	0	0	0	0	0	2,683	2,743	2,854	2,966	3,079
16	1,184	1,218	1,277	1,337	1,394	0	0	0	0	0	1,184	1,218	1,277	1,337	1,394
TOTALS	**34,095**	**34,144**	**34,924**	**35,647**	**36,157**	**420**	**422**	**428**	**441**	**458**	**34,514**	**34,567**	**35,352**	**36,087**	**36,615**

SOURCE: Tables 3 & 26

LB BARNET
BOROUGH-WIDE TOWN CENTRES STUDY 2008

NEW BARNET DISTRICT CENTRE

TABLE 28
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

Catchment Zone	Sainsburys					Other					TOTAL				
	2008	2011	2016	2021	2026	2008	2011	2016	2021	2026	2008	2011	2016	2021	2026
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	28	28	28	28	28	0	0	0	0	0	28	28	28	28	28
2	34	34	34	34	34	2	2	2	2	2	36	36	36	36	36
3	1	1	1	1	1	0	0	0	0	0	1	1	1	1	1
4	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
5	0	0	0	0	0	1	1	1	1	1	1	1	1	1	1
6	0	0	0	0	0	4	4	4	4	4	4	4	4	4	4
7	0	0	0	0	0	2	2	2	2	2	2	2	2	2	2
8	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
10	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
11	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
12	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
13	4	4	4	4	4	0	0	0	0	0	4	4	4	4	4
14	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
15	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
16	0	0	0	0	0	1	1	1	1	1	1	1	1	1	1

SOURCE: Household Survey, September 2008

TABLE 29
CONVENIENCE GOODS ALLOCATION - SPEND (£) 2006 PRICES

Catchment Zone	Sainsburys					Other					TOTAL				
	2008	2011	2016	2021	2026	2008	2011	2016	2021	2026	2008	2011	2016	2021	2026
	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)
1	14,486	14,528	15,191	15,482	15,825	0	0	0	0	0	14,486	14,528	15,191	15,482	15,825
2	20,961	21,107	21,389	22,016	22,884	1,181	1,189	1,205	1,240	1,289	22,142	22,296	22,594	23,256	24,173
3	729	722	726	734	755	0	0	0	0	0	729	722	726	734	755
4	0	0	0	0	0	128	133	157	164	154	128	133	157	164	154
5	0	0	0	0	0	348	344	342	354	331	348	344	342	354	331
6	0	0	0	0	0	2,852	2,835	2,807	2,841	2,765	2,852	2,835	2,807	2,841	2,765
7	0	0	0	0	0	636	627	621	624	577	636	627	621	624	577
8	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
10	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
11	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
12	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
13	2,131	2,143	2,191	2,261	2,335	0	0	0	0	0	2,131	2,143	2,191	2,261	2,335
14	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
15	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
16	0	0	0	0	0	897	923	968	1,013	1,056	897	923	968	1,013	1,056
TOTALS	**38,307**	**38,500**	**39,497**	**40,492**	**41,799**	**6,042**	**6,051**	**6,100**	**6,235**	**6,173**	**44,349**	**44,551**	**45,597**	**46,727**	**47,973**

SOURCE: Tables 3 & 28

LB BARNET
BOROUGH-WIDE TOWN CENTRES STUDY 2008

WHETSTONE DISTRICT CENTRE

TABLE 30
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

Catchment Zone	Waitrose					Other Stores in Whetstone					TOTAL				
	2008	2011	2016	2021	2026	2008	2011	2016	2021	2026	2008	2011	2016	2021	2026
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%) (%)		(%)	(%)	(%)	(%)	(%)
1	1	1	1	1	1	0	0	0	0	0	1	1	1	1	1
2	11	11	11	11	11	0	0	0	0	0	11	11	11	11	11
3	5	5	5	5	5	0	0	0	0	0	5	5	5	5	5
4	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
5	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
6	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
7	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
8	0	0	0	0	0	6	6	6	6	6	6	6	6	6	6
9	0	0	0	0	0	2	2	2	2	2	2	2	2	2	2
10	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
11	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
12	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
13	2	2	2	2	2	0	0	0	0	0	2	2	2	2	2
14	0	0	0	0	0	1	1	1	1	1	1	1	1	1	1
15	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
16	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

SOURCE: Household Survey, September 2008

TABLE 31
CONVENIENCE GOODS ALLOCATION - SPEND (£) 2006 PRICES

Catchment Zone	Waitrose					Other Stores in Whetstone					TOTAL				
	2008	2011	2016	2021	2026	2008	2011	2016	2021	2026	2008	2011	2016	2021	2026
	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000) (£000)		(£000)	(£000)	(£000)	(£000)	(£000)
1	385	386	403	411	420	0	0	0	0	0	385	386	403	411	420
2	6,604	6,650	6,739	6,936	7,210	0	0	0	0	0	6,604	6,650	6,739	6,936	7,210
3	5,178	5,127	5,154	5,211	5,358	0	0	0	0	0	5,178	5,127	5,154	5,211	5,358
4	128	133	157	164	154	0	0	0	0	0	128	133	157	164	154
5	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
6	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
7	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
8	0	0	0	0	0	3,872	3,921	3,990	4,119	4,545	3,872	3,921	3,990	4,119	4,545
9	0	0	0	0	0	1,409	1,547	1,751	1,799	1,963	1,409	1,547	1,751	1,799	1,963
10	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
11	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
12	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
13	1,003	1,008	1,031	1,064	1,099	0	0	0	0	0	1,003	1,008	1,031	1,064	1,099
14	0	0	0	0	0	421	417	421	431	444	421	417	421	431	444
15	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
16	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
TOTALS	**13,298**	**13,304**	**13,484**	**13,786**	**14,241**	**5,702**	**5,885**	**6,162**	**6,349**	**6,951**	**18,999**	**19,189**	**19,646**	**20,134**	**21,193**

SOURCE: Tables 3 & 30

LB BARNET
BOROUGH-WIDE TOWN CENTRES STUDY 2008

HENDON CENTRAL DISTRICT CENTRE

TABLE 32
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

Catchment Zone	HENDON CENTRAL 2008 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)
1	0	0	0	0	0
2	0	0	0	0	0
3	0	0	0	0	0
4	0	0	0	0	0
5	0	0	0	0	0
6	0	0	0	0	0
7	0	0	0	0	0
8	0	0	0	0	0
9	0	0	0	0	0
10	1	1	1	1	1
11	0	0	0	0	0
12	0	0	0	0	0
13	0	0	0	0	0
14	0	0	0	0	0
15	0	0	0	0	0
16	0	0	0	0	0

SOURCE: Household Survey, September 2008

TABLE 33
CONVENIENCE GOODS ALLOCATION - SPEND (£) 2006 PRICES

Catchment Zone	HENDON CENTRAL 2008 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)
1	0	0	0	0	0
2	0	0	0	0	0
3	0	0	0	0	0
4	128	133	157	164	154
5	0	0	0	0	0
6	0	0	0	0	0
7	0	0	0	0	0
8	0	0	0	0	0
9	266	291	330	339	370
10	430	431	423	457	448
11	0	0	0	0	0
12	0	0	0	0	0
13	0	0	0	0	0
14	0	0	0	0	0
15	0	0	0	0	0
16	0	0	0	0	0
TOTALS	**824**	**856**	**910**	**960**	**972**

SOURCE: Tables 3 & 32

LB BARNET
BOROUGH-WIDE TOWN CENTRES STUDY 2008

GOLDERS GREEN DISTRICT CENTRE

TABLE 34
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

Catchment Zone	Sainsburys					Tesco Express					Other Stores in Golders Green					TOTAL				
	2008	2011	2016	2021	2026	2008	2011	2016	2021	2026	2008	2011	2016	2021	2026	2008	2011	2016	2021	2026
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
2	0	0	0	0	0	2	2	2	2	2	0	0	0	0	0	2	2	2	2	2
3	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
4	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
5	0	0	0	0	0	0	0	0	0	0	1	1	1	1	1	1	1	1	1	1
6	0	0	0	0	0	1	1	1	1	1	0	0	0	0	0	1	1	1	1	1
7	3	3	3	3	3	1	1	1	1	1	0	0	0	0	0	4	4	4	4	4
8	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
10	9	9	9	9	9	3	3	3	3	3	3	3	3	3	3	14	14	14	14	14
11	2	2	2	2	2	0	0	0	0	0	0	0	0	0	0	2	2	2	2	2
12	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
13	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
14	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
15	7	7	7	7	7	1	1	1	1	1	0	0	0	0	0	8	8	8	8	8
16	5	5	5	5	5	0	0	0	0	0	0	0	0	0	0	5	5	5	5	5

SOURCE: Household Survey, September 2008

TABLE 35
CONVENIENCE GOODS ALLOCATION - SPEND (£) 2006 PRICES

Catchment Zone	Sainsburys					Tesco Express					Other Stores in Golders Green					TOTAL				
	2008	2011	2016	2021	2026	2008	2011	2016	2021	2026	2008	2011	2016	2021	2026	2008	2011	2016	2021	2026
	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)
1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
2	0	0	0	0	0	979	986	999	1,028	1,069	0	0	0	0	0	979	986	999	1,028	1,069
3	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
4	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
5	0	0	0	0	0	0	0	0	0	0	522	516	514	531	497	522	516	514	531	497
6	209	209	209	209	209	522	519	513	520	506	0	0	0	0	0	730	726	719	728	708
7	1,340	1,340	1,340	1,340	1,340	318	314	311	312	289	0	0	0	0	0	1,658	1,635	1,619	1,625	1,504
8	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
10	5,740	5,740	5,740	5,740	5,740	1,853	1,858	1,823	1,969	1,929	1,720	1,725	1,693	1,828	1,791	9,313	9,340	9,164	9,898	9,696
11	1,559	1,559	1,559	1,559	1,559	0	0	0	0	0	0	0	0	0	0	1,559	1,739	2,335	2,448	2,537
12	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
13	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
14	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
15	7,671	7,671	7,671	7,671	7,671	1,342	1,372	1,427	1,483	1,539	0	0	0	0	0	9,012	9,213	9,586	9,962	10,341
16	7,209	7,209	7,209	7,209	7,209	0	0	0	0	0	0	0	0	0	0	7,209	7,418	7,780	8,142	8,489
TOTALS	**23,727**	**23,727**	**23,727**	**23,727**	**23,727**	**5,013**	**5,048**	**5,073**	**5,312**	**5,332**	**2,243**	**2,241**	**2,207**	**2,359**	**2,288**	**30,983**	**31,573**	**32,715**	**34,361**	**34,841**

SOURCE: Tables 3 & 34

LB BARNET
BOROUGH-WIDE TOWN CENTRES STUDY 2008

LOCAL CENTRES

TABLE 36
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

Catchment Zone	LOCAL CENTRES				
	2008	2011	2016	2021	2026
	(%)	(%)	(%)	(%)	(%)
1	0	0	0	0	0
2	2	2	2	2	2
3	2	2	2	2	2
4	0	0	0	0	0
5	0	0	0	0	0
6	0	0	0	0	0
7	1	1	1	1	1
8	0	0	0	0	0
9	0	0	0	0	0
10	1	1	1	1	1
11	0	0	0	0	0
12	0	0	0	0	0
13	0	0	0	0	0
14	0	0	0	0	0
15	0	0	0	0	0
16	1	1	1	1	1

SOURCE: Household Survey, September 2008

TABLE 37
CONVENIENCE GOODS ALLOCATION - SPEND (£) 2006 PRICES

Catchment Zone	LOCAL CENTRES				
	2008	2011	2016	2021	2026
	(£000)	(£000)	(£000)	(£000)	(£000)
1	154	154	161	164	168
2	1,181	1,189	1,205	1,240	1,289
3	1,799	1,781	1,791	1,810	1,862
4	0	0	0	0	0
5	0	0	0	0	0
6	0	0	0	0	0
7	251	247	245	246	227
8	0	0	0	0	0
9	0	0	0	0	0
10	430	431	423	457	448
11	294	327	439	461	478
12	0	0	0	0	0
13	0	0	0	0	0
14	0	0	0	0	0
15	379	388	403	419	435
16	2,080	2,141	2,245	2,349	2,449
TOTALS	**6,567**	**6,658**	**6,913**	**7,147**	**7,356**

SOURCE: Tables 3 & 36

LB BARNET
BOROUGH-WIDE TOWN CENTRES STUDY 2008

OUT OF CENTRE STORES

TABLE 38
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

Catchment Zone	MARKS AND SPENCER WHETSTONE					SAINSBURYS THE HYDE					TESCO, BRENT CROSS RETAIL PARK					TESCO, COLNEY HATCH LANE				
	2008	2011	2016	2021	2026	2008	2011	2016	2021	2026	2008	2011	2016	2021	2026	2008	2011	2016	2021	2026
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	1	1	1	1	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
2	1	1	1	1	1	0	0	0	0	0	0	0	0	0	0	4	4	4	4	4
3	0	0	0	0	0	0	0	0	0	0	1	1	1	1	1	19	19	19	19	19
4	0	0	0	0	0	2	2	2	2	2	2	2	2	2	2	5	5	5	5	5
5	0	0	0	0	0	0	0	0	0	0	1	1	1	1	1	14	14	14	14	14
6	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	23	23	23	23	23
7	0	0	0	0	0	0	0	0	0	0	4	4	4	4	4	10	10	10	10	10
8	0	0	0	0	0	0	0	0	0	0	1	1	1	1	1	2	2	2	2	2
9	0	0	0	0	0	9	9	9	9	9	1	1	1	1	1	0	0	0	0	0
10	0	0	0	0	0	2	2	2	2	2	5	5	5	5	5	5	5	5	5	5
11	0	0	0	0	0	19	19	19	19	19	3	3	3	3	3	7	7	7	7	7
12	0	0	0	0	0	1	1	1	1	1	0	0	0	0	0	0	0	0	0	0
13	1	1	1	1	1	0	0	0	0	0	0	0	0	0	0	2	2	2	2	2
14	0	0	0	0	0	1	1	1	1	1	0	0	0	0	0	0	0	0	0	0
15	0	0	0	0	0	4	4	4	4	4	4	4	4	4	4	1	1	1	1	1
16	0	0	0	0	0	0	0	0	0	0	1	1	1	1	1	2	2	2	2	2

SOURCE: Household Survey, September 2008

TABLE 39
CONVENIENCE GOODS ALLOCATION - SPEND (£) 2006 PRICES

Catchment Zone	MARKS AND SPENCER WHETSTONE					SAINSBURYS THE HYDE					TESCO, BRENT CROSS RETAIL PARK					TESCO, COLNEY HATCH LANE				
	2008	2011	2016	2021	2026	2008	2011	2016	2021	2026	2008	2011	2016	2021	2026	2008	2011	2016	2021	2026
	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)
1	538	540	565	575	588	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
2	668	673	682	702	729	0	0	0	0	0	0	0	0	0	0	2,331	2,347	2,378	2,448	2,545
3	0	0	0	0	0	0	0	0	0	0	729	722	726	734	755	18,671	18,485	18,584	18,789	19,320
4	0	0	0	0	0	960	1,001	1,179	1,227	1,157	640	667	786	818	771	2,336	2,435	2,870	2,986	2,816
5	0	0	0	0	0	0	0	0	0	0	348	344	342	354	331	6,523	6,445	6,415	6,629	6,204
6	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	16,067	15,971	15,815	16,006	15,581
7	0	0	0	0	0	0	0	0	0	0	1,658	1,635	1,619	1,625	1,504	3,961	3,906	3,868	3,883	3,595
8	0	0	0	0	0	0	0	0	0	0	494	501	509	526	580	1,433	1,452	1,477	1,525	1,682
9	0	0	0	0	0	7,721	8,473	9,592	9,854	10,753	613	672	761	782	853	266	291	330	339	370
10	0	0	0	0	0	1,208	1,211	1,188	1,283	1,257	3,523	3,534	3,467	3,745	3,668	3,523	3,534	3,467	3,745	3,668
11	0	0	0	0	0	13,868	15,467	20,764	21,773	22,565	2,476	2,762	3,708	3,888	4,030	4,990	5,565	7,471	7,834	8,119
12	0	0	0	0	0	410	414	429	453	476	0	0	0	0	0	0	0	0	0	0
13	585	588	601	621	641	167	168	172	177	183	0	0	0	0	0	1,254	1,260	1,289	1,330	1,374
14	0	0	0	0	0	467	464	468	479	493	0	0	0	0	0	0	0	0	0	0
15	0	0	0	0	0	4,142	4,234	4,405	4,578	4,752	5,104	5,218	5,429	5,642	5,857	962	984	1,024	1,064	1,104
16	0	0	0	0	0	0	0	0	0	0	1,184	1,218	1,277	1,337	1,394	3,443	3,543	3,716	3,889	4,054
TOTALS	**1,792**	**1,801**	**1,848**	**1,898**	**1,959**	**28,942**	**31,431**	**38,198**	**39,825**	**41,637**	**16,770**	**17,272**	**18,625**	**19,450**	**19,743**	**65,760**	**66,219**	**68,703**	**70,465**	**70,432**

SOURCE: Tables 3 & 34

TABLE 38a
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

Catchment Zone	TESCO EXPRESS EAST BARNET ROAD					WAITROSE, BALLARDS LANE NORTH FINCHLEY					WAITROSE MILL HILL EAST					TOTAL*				
	2008	2011	2016	2021	2026	2008	2011	2016	2021	2026	2008	2011	2016	2021	2026	2008	2011	2016	2021	2026
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	1	1	1	1	1	0	0	0	0	0	0	0	0	0	0	3	3	3	3	3
2	1	1	1	1	1	2	2	2	2	2	1	1	1	1	1	8	8	8	8	8
3	3	3	3	3	3	8	8	8	8	8	0	0	0	0	0	31	31	31	31	31
4	0	0	0	0	0	10	10	10	10	10	20	20	20	20	20	39	39	39	39	39
5	2	2	2	2	2	13	13	13	13	13	4	4	4	4	4	33	33	33	33	33
6	2	2	2	2	2	7	7	7	7	7	0	0	0	0	0	32	32	32	32	32
7	2	2	2	2	2	9	9	9	9	9	5	5	5	5	5	31	31	31	31	31
8	0	0	0	0	0	0	0	0	0	0	9	9	9	9	9	12	12	12	12	12
9	0	0	0	0	0	0	0	0	0	0	1	1	1	1	1	11	11	11	11	11
10	0	0	0	0	0	4	4	4	4	4	0	0	0	0	0	16	16	16	16	16
11	1	1	1	1	1	0	0	0	0	0	0	0	0	0	0	30	30	30	30	30
12	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1	1
13	1	1	1	1	1	0	0	0	0	0	0	0	0	0	0	5	5	5	5	5
14	0	0	0	0	0	0	0	0	0	0	1	1	1	1	1	2	2	2	2	2
15	0	0	0	0	0	0	0	0	0	0	2	2	2	2	2	11	11	11	11	11
16	0	0	0	0	0	5	5	5	5	5	0	0	0	0	0	9	9	9	9	9

SOURCE: Household Survey, September 2008

TABLE 39a
CONVENIENCE GOODS ALLOCATION - SPEND (£) 2006 PRICES

Catchment Zone	TESCO EXPRESS EAST BARNET ROAD					WAITROSE, BALLARDS LANE NORTH FINCHLEY					WAITROSE MILL HILL EAST					TOTAL*				
	2008	2011	2016	2021	2026	2008	2011	2016	2021	2026	2008	2011	2016	2021	2026	2008	2011	2016	2021	2026
	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)
1	692	694	726	740	756	154	154	161	164	168	0	0	0	0	0	1,384	1,389	1,452	1,480	1,512
2	622	626	634	653	679	979	986	999	1,028	1,069	466	469	476	490	509	5,065	5,101	5,169	5,320	5,530
3	2,772	2,744	2,759	2,789	2,868	8,120	8,039	8,082	8,171	8,402	0	0	0	0	0	30,292	29,991	30,150	30,483	31,345
4	0	0	0	0	0	4,170	4,348	5,124	5,331	5,027	8,329	8,685	10,235	10,649	10,042	16,435	17,137	20,194	21,011	19,814
5	731	723	719	743	695	6,105	6,032	6,004	6,204	5,806	1,811	1,789	1,781	1,840	1,722	15,519	15,333	15,260	15,770	14,759
6	1,513	1,504	1,489	1,507	1,467	4,538	4,511	4,467	4,521	4,401	0	0	0	0	0	22,119	21,986	21,771	22,034	21,449
7	925	912	903	907	840	3,287	3,241	3,209	3,222	2,982	1,947	1,920	1,901	1,908	1,767	11,777	11,613	11,500	11,545	10,688
8	0	0	0	0	0	198	200	204	210	232	5,717	5,790	5,891	6,082	6,711	7,842	7,943	8,081	8,343	9,205
9	0	0	0	0	0	0	0	0	0	0	613	672	761	782	853	9,212	10,109	11,445	11,757	12,830
10	0	0	0	0	0	2,415	2,422	2,377	2,567	2,514	215	216	212	229	224	10,884	10,916	10,711	11,568	11,332
11	605	675	906	950	985	294	327	439	461	478	0	0	0	0	0	22,233	24,796	33,288	34,905	36,176
12	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	410	414	429	453	476
13	585	588	601	621	641	0	0	0	0	0	0	0	0	0	0	2,591	2,605	2,664	2,749	2,839
14	0	0	0	0	0	0	0	0	0	0	467	464	468	479	493	935	927	936	958	986
15	0	0	0	0	0	0	0	0	0	0	2,304	2,355	2,451	2,547	2,644	12,512	12,791	13,309	13,831	14,357
16	0	0	0	0	0	7,676	7,898	8,283	8,669	9,038	0	0	0	0	0	12,302	12,659	13,276	13,894	14,486
TOTALS	**8,445**	**8,466**	**8,738**	**8,910**	**8,931**	**37,935**	**38,159**	**39,349**	**40,548**	**40,118**	**21,869**	**22,361**	**24,175**	**25,005**	**24,965**	**181,513**	**185,710**	**199,637**	**206,101**	**207,785**

SOURCE: Tables 3 & 34

*Total includes all stores in Tables 38 & 38a and 39 & 39a

TABLE 40

BRENT CROSS REGIONAL SHOPPING CENTRE CONVENIENCE GOODS FLOORSPACE

	Net Floorspace (sqm)	Net Convenience Ratio (%)	Net Convenience Floorspace (sqm)	Company Average Sales Density (£ per sq m net)	Total Potential Turnover (£000s)
TOWN CENTRE					
Waitrose	1,922	100%	1,922	11,601	22,297
M&S Food Hall	770	100%	770	11,800	9,086
SUB TOTAL	**2,692**		**2,692**	**11,658**	**31,383**

Source: IGD/LB Barnet/Experian Goad

TABLE 41

EDGWARE MAJOR CENTRE CONVENIENCE GOODS FLOORSPACE

	Net Floorspace (sqm)	Net Convenience Ratio (%)	Net Convenience Floorspace (sqm)	Company Average Sales Density (£ per sq m net)	Total Potential Turnover (£000s)
TOWN CENTRE					
Sainsbury's,The Broadwalk Centre	3,101	90%	2,791	11,173	31,183
M&S Food Hall, The Broadwalk Centre	1,645	100%	1,645	11,800	19,411
Other	3,064	100%	3,064	2,500	7,660
SUB TOTAL	**7,810**		**7,500**	**7,767**	**58,254**

Source: IGD/LB Barnet/Experian Goad

TABLE 42

BRENT STREET DISTRICT CENTRE CONVENIENCE GOODS FLOORSPACE

	Net Floorspace (sqm)	Net Convenience Ratio (%)	Net Convenience Floorspace (sqm)	Company Average Sales Density (£ per sq m net)	Total Potential Turnover (£000s)
TOWN CENTRE					
Tesco, Sentinel Square	677	100%	677	12,894	8,729
Other	1,385	100%	1,385	1,500	2,078
SUB TOTAL	**2,062**		**2,062**	**5,241**	**10,807**

Source: IGD/LB Barnet/Experian Goad

TABLE 43

CHIPPING BARNET DISTRICT CENTRE CONVENIENCE GOODS FLOORSPACE

	Net Floorspace (sqm)	Net Convenience Ratio (%)	Net Convenience Floorspace (sqm)	Company Average Sales Density (£ per sq m net)	Total Potential Turnover (£000s)
TOWN CENTRE					
Waitrose, The Spires Shopping Centre	1,505	100%	1,505	11,601	17,460
Other	2,152	100%	2,152	1,500	3,228
SUB TOTAL	**3,657**		**3,657**	**5,657**	**20,688**

Source: IGD/LB Barnet/Experian Goad

TABLE 44

CHURCH END, FINCHLEY DISTRICT CENTRE CONVENIENCE GOODS FLOORSPACE

	Net Floorspace (sqm)	Net Convenience Ratio (%)	Net Convenience Floorspace (sqm)	Company Average Sales Density (£ per sq m net)	Total Potential Turnover (£000s)
TOWN CENTRE					
Tesco, Ballards Lane	3,102	95%	2,947	12,894	37,997
Other	2,256	100%	2,256	1,500	3,384
SUB TOTAL	**5,358**		**5,203**	**7,954**	**41,381**

Source: IGD/LB Barnet/Experian Goad

TABLE 45

EAST FINCHLEY DISTRICT CENTRE CONVENIENCE GOODS FLOORSPACE

	Net Floorspace (sqm)	Net Convenience Ratio (%)	Net Convenience Floorspace (sqm)	Company Average Sales Density (£ per sq m net)	Total Potential Turnover (£000s)
TOWN CENTRE					
Other	2,230	100%	2,230	2,000	4,460
SUB TOTAL	**2,230**		**2,230**	**2,000**	**4,460**

Source: IGD/LB Barnet/Experian Goad

TABLE 46

MILL HILL DISTRICT CENTRE CONVENIENCE GOODS FLOORSPACE

	Net Floorspace (sqm)	Net Convenience Ratio (%)	Net Convenience Floorspace (sqm)	Company Average Sales Density (£ per sq m net)	Total Potential Turnover (£000s)
TOWN CENTRE					
M&S, The Broadway	836	100%	836	11,800	9,865
Other	1,021	100%	1,021	1,500	1,532
SUB TOTAL	**1,857**		**1,857**	**6,137**	**11,396**

Source: IGD/LB Barnet/Experian Goad

TABLE 47

COLINDALE DISTRICT CENTRE CONVENIENCE GOODS FLOORSPACE

	Net Floorspace (sqm)	Net Convenience Ratio (%)	Net Convenience Floorspace (sqm)	Company Average Sales Density (£ per sq m net)	Total Potential Turnover (£000s)
TOWN CENTRE					
Other	1,231	100%	1,231	1,500	1,847
SUB TOTAL	**1,231**		**1,231**	**1,500**	**1,847**

Source: IGD/LB Barnet/Experian Goad

TABLE 48

TEMPLE FORTUNE DISTRICT CENTRE CONVENIENCE GOODS FLOORSPACE

	Net Floorspace (sqm)	Net Convenience Ratio (%)	Net Convenience Floorspace (sqm)	Company Average Sales Density (£ per sq m net)	Total Potential Turnover (£000s)
TOWN CENTRE					
Waitrose, Finchley Road	1,880	100%	1,880	11,601	21,810
M&S, Finchley Road	836	100%	836	11,800	9,865
Other	1,690	100%	1,690	1,500	2,535
SUB TOTAL	**4,406**		**4,406**	**7,764**	**34,210**

Source: IGD/LB Barnet/Experian Goad

TABLE 49

BURNT OAK DISTRICT CENTRE CONVENIENCE GOODS FLOORSPACE

	Net Floorspace (sqm)	Net Convenience Ratio (%)	Net Convenience Floorspace (sqm)	Company Average Sales Density (£ per sq m net)	Total Potential Turnover (£000s)
TOWN CENTRE					
Tesco, Burnt Oak Broadway	1,092	95%	1,037	12,894	13,376
Other	3,715	100%	3,715	1,500	5,573
SUB TOTAL	**4,807**		**4,752**	**3,987**	**18,949**

Source: IGD/LB Barnet/Experian Goad

TABLE 50

CRICKLEWOOD DISTRICT CENTRE CONVENIENCE GOODS FLOORSPACE

	Net Floorspace (sqm)	Net Convenience Ratio (%)	Net Convenience Floorspace (sqm)	Company Average Sales Density (£ per sq m net)	Total Potential Turnover (£000s)
TOWN CENTRE					
Somerfield	753	100%	753	6,981	5,257
Other	4,766	100%	4,766	1,500	7,149
SUB TOTAL	**4,766**		**5,519**	**2,248**	**12,406**

Source: IGD/LB Barnet/Experian Goad

TABLE 51

NORTH FINCHLEY DISTRICT CENTRE CONVENIENCE GOODS FLOORSPACE

	Net Floorspace (sqm)	Net Convenience Ratio (%)	Net Convenience Floorspace (sqm)	Company Average Sales Density (£ per sq m net)	Total Potential Turnover (£000s)
TOWN CENTRE					
Sainsbury's, High Road	2,285	100%	2,285	9,744	22,265
Other	1,313	100%	1,313	1,500	1,970
SUB TOTAL	**3,598**		**3,598**	**6,736**	**24,235**

Source: IGD/LB Barnet/Experian Goad

TABLE 52

NEW BARNET DISTRICT CENTRE CONVENIENCE GOODS FLOORSPACE

	Net Floorspace (sqm)	Net Convenience Ratio (%)	Net Convenience Floorspace (sqm)	Company Average Sales Density (£ per sq m net)	Total Potential Turnover (£000s)
TOWN CENTRE					
Sainsbury's, East Barnet Road	2,955	90%	2,660	9,744	25,914
Other	286	100%	286	1,500	429
SUB TOTAL	**3,241**		**2,946**	**8,944**	**26,343**

Source: IGD/LB Barnet/Experian Goad

TABLE 53

WHETSTONE DISTRICT CENTRE CONVENIENCE GOODS FLOORSPACE

	Net Floorspace (sqm)	Net Convenience Ratio (%)	Net Convenience Floorspace (sqm)	Company Average Sales Density (£ per sq m net)	Total Potential Turnover (£000s)
TOWN CENTRE					
Waitrose, High Road	1,496	100%	1,496	11,601	17,355
Other	644	100%	644	1,500	966
SUB TOTAL	**2,140**		**2,140**	**8,561**	**18,321**

Source: IGD/LB Barnet/Experian Goad

TABLE 54

HENDON CENTRAL DISTRICT CENTRE CONVENIENCE GOODS FLOORSPACE

	Net Floorspace (sqm)	Net Convenience Ratio (%)	Net Convenience Floorspace (sqm)	Company Average Sales Density (£ per sq m net)	Total Potential Turnover (£000s)
TOWN CENTRE					
Other	1,768	100%	1,768	1,500	2,652
SUB TOTAL	**1,768**		**1,768**	**1,500**	**2,652**

Source: IGD/LB Barnet/Experian Goad

TABLE 55

GOLDERS GREEN DISTRICT CENTRE CONVENIENCE GOODS FLOORSPACE

	Net Floorspace (sqm)	Net Convenience Ratio (%)	Net Convenience Floorspace (sqm)	Company Average Sales Density (£ per sq m net)	Total Potential Turnover (£000s)
TOWN CENTRE					
Sainsbury's, Finchley Road	1,260	100%	1,260	9,744	12,277
Tesco Express, Golders Green Road	262	100%	262	12,894	3,378
Other	1,580	100%	1,580	1,500	2,370
SUB TOTAL	**3,102**		**3,102**	**5,811**	**18,026**

Source: IGD/LB Barnet/Experian Goad

TABLE 56
LOCAL CENTRE CONVENIENCE GOODS FLOORSPACE

	Net Floorspace (sqm)	Net Convenience Ratio (%)	Net Convenience Floorspace (sqm)	Company Average Sales Density (£ per sq m net)	Total Potential Turnover (£000s)
Local Centres	1,274	100%	1,274	1,500	1,911

Source: IGD/LB Barnet/Experian Goad

TABLE 57
OUT OF CENTRE CONVENIENCE GOODS FLOORSPACE

	Net Floorspace (sqm)	Net Convenience Ratio (%)	Net Convenience Floorspace (sqm)	Company Average Sales Density (£ per sq m net)	Total Potential Turnover (£000s)
Lidl, Edgware Road, Cricklewood	741	100%	741		
M&S, High Road, Whetstone	836	100%	836	11,800	9,865
Sainsbury's, Hyde Estate Road	3,506	90%	3,155	9,744	30,746
Tesco, Brent Cross Retail Park, Cricklewood	3,681	75%	2,761	12,894	35,597
Tesco, Colney Hatch/North Circular Road	4,212	71%	3,007	12,894	38,772
Tesco Express East Barnet Road	233	100%	233	12,894	3,004
Waitrose, Ballards Lane, North Finchley	2,516	100%	2,516	11,601	29,188
Waitrose, Mill Hill East	1,685	100%	1,685	11,601	19,548
SUB TOTAL	**17,410**		**14,193**	**11,747**	**166,720**

Source: IGD/LB Barnet/Experian Goad

TABLE 58
TOTAL CONVENIENCE GOODS FLOORSPACE

	Net Floorspace (sqm)	Net Convenience Ratio (%)	Net Convenience Floorspace (sqm)	Company Average Sales Density (£ per sq m net)	Total Potential Turnover (£000s)
North	7,967		7,672	7,808	59,900
West	20,896		20,181	6,974	140,739
East	20,054		18,694	8,364	156,357
South West	11,139		12,740	6,440	82,038
South East	9,570		9,570	6,587	63,042
TOTAL	**69,626**		**68,856**	**7,292**	**502,076**

Source: IGD/LB Barnet/Experian Goad

LB BARNET
BOROUGH-WIDE TOWN CENTRES STUDY 2008

TABLE 59
RETAIL CONVENIENCE COMMITMENTS

	Net Floorspace (sqm)	Net Convenience Ratio (%)	Net Convenience (sqm)	Co Average Sales (£ per sq m net)	Average Turnover 2008 (£000s)	Average Turnover 2011 (£000s)	Average Turnover 2016 (£000s)	Average Turnover 2021 (£000s)	Average Turnover 2026 (£000s)
Extention to Tesco, Colney Hatch/North Circular Road	308	100%	308	3,000	924	932	946	961	975
612-614 Finchley Road, NW11 7RX, (Golders Green)	407	100%	407	3,000	1,220	1,231	1,249	1,268	1,287
Former Courts Unit, Staples Corner Retail Park, Edgware Road	402	100%	402	3,000	1,206	1,217	1,235	1,254	1,273
Grahame Park Estate, Lanacre Avenue	351	100%	351	3,000	1,053	1,063	1,079	1,095	1,111
Unit 1C Brent Cross Shopping Centre	161	100%	161	3,000	482	486	493	501	508
TOTAL			**1,628**		**4,884**	**4,928**	**5,002**	**5,078**	**5,155**

Source: LB Barnet

LB BARNET
BOROUGH-WIDE TOWN CENTRES STUDY 2008

TABLE 60
RETAIL PIPELINE - CONVENIENCE GOODS

	Net Floorspace (sqm)	Net Convenience Ratio (%)	Net Convenience (sqm)	Co Average Sales (£ per sqm net)	Total Turnover 2008 (£000s)	Total Turnover 2011 (£000s)	Total Turnover 2016 (£000s)	Total Turnover 2021 (£000s)	Total Turnover 2026 (£000s)
New Barnet Asda	5,796	70%	4,057	14,352	58,229	58,755	59,641	60,541	61,455
New Barnet Tesco	4,180	70%	2,926	12,894	37,728	38,068	38,643	39,226	39,818
Tesco Express, 7-11 Victoria Road, New Barnet	241	100%	241	12,894	3,107	3,136	3,183	3,231	3,280
Brent Cross, Tesco Extra plus unit shops (Replacement Flsp Only)	7,380	70%	5,166	12,894	66,611	67,213	68,227	69,256	70,302
Colindale Avenue convenience store	2,500	100%	2,500	2,500	6,250	6,306	6,402	6,498	6,596
Mill Hill unit shops	1,000	100%	1,000	2,500	2,500	2,523	2,561	2,599	2,638
TOTAL	**21,097**		**15,890**		**174,426**	**176,000**	**178,656**	**181,352**	**184,089**

Source: LB Barnet

LB BARNET
BOROUGH-WIDE TOWN CENTRES STUDY 2008

CAPACITY PROJECTIONS: CONVENIENCE GOODS

TABLE 61
FUTURE SHOP GLOBAL FLOORSPACE CAPACITY FOR LB BARNET

	CONVENIENCE GOODS				
	2008	2011	2016	2021	2026
Total Convenience Goods Turnover in LB Barnet (£000)	497,691	508,034	539,409	557,430	566,588
Existing Shop Floorspace (sqm net)	68,856	68,856	68,856	68,856	68,856
Sales per sqm net £	7,228	7,292	7,292	7,292	7,292
Sales from Existing Floorspace (£000)	497,691	502,076	502,076	502,076	502,076
Sales from Committed Floorspace (£000)	0	4,928	5,002	5,078	5,155
Residual Spending to Support new shops (£000)	0	1,030	32,330	50,276	59,357
Sales per sqm net in new shops (£) Based on large store format	10,000	10,000	10,000	10,000	10,000
Capacity for new floorspace (sqm net)	0	103	3,233	5,028	5,936

TABLE 62
FUTURE SHOP FLOORSPACE CAPACITY FOR NORTH SUB AREA

	CONVENIENCE GOODS				
	2008	2011	2016	2021	2026
Total Convenience Goods Turnover in LB Barnet (£000)	76,008	76,431	78,743	80,605	82,601
Existing Shop Floorspace (sqm net)	7,672	7,672	7,672	7,672	7,672
Sales per sqm net £	9,908	7,808	7,808	7,808	7,808
Sales from Existing Floorspace (£000)	76,008	59,900	59,900	59,900	59,900
Sales from Committed Floorspace (£000)	0	0	0	0	0
Residual Spending to Support new shops (£000)	0	16,532	18,843	20,706	22,702
Sales per sqm net in new shops (£) Based on large store format	10,000	10,000	10,000	10,000	10,000
Capacity for new floorspace (sqm net)	0	1,653	1,884	2,071	2,270

TABLE 63
FUTURE SHOP FLOORSPACE CAPACITY FOR WEST SUB AREA

	CONVENIENCE GOODS				
	2008	2011	2016	2021	2026
Total Convenience Goods Turnover in LB Barnet (£000)	124,580	130,661	146,164	151,649	158,554
Existing Shop Floorspace (sqm net)	20,181	20,181	20,181	20,181	20,181
Sales per sqm net £	6,173	6,974	6,974	6,974	6,974
Sales from Existing Floorspace (£000)	124,580	140,739	140,739	140,739	140,739
Sales from Committed Floorspace (£000)	0	0	0	0	0
Residual Spending to Support new shops (£000)	0	-10,078	5,425	10,910	17,814
Sales per sqm net in new shops (£) Based on large store format	10,000	10,000	10,000	10,000	10,000
Capacity for new floorspace (sqm net)	0	-1,008	543	1,091	1,781

TABLE 64
FUTURE SHOP FLOORSPACE CAPACITY FOR EAST SUB AREA

	CONVENIENCE GOODS				
	2008	2011	2016	2021	2026
Total Convenience Goods Turnover in LB Barnet (£000)	190,884	191,870	197,937	203,171	202,460
Existing Shop Floorspace (sqm net)	18,694	18,694	18,694	18,694	18,694
Sales per sqm net £	10,211	8,364	8,364	8,364	8,364
Sales from Existing Floorspace (£000)	190,884	156,357	156,357	156,357	156,357
Sales from Committed Floorspace (£000)	0	1,995	2,025	2,056	2,087
Residual Spending to Support new shops (£000)	0	33,518	39,555	44,758	44,016
Sales per sqm net in new shops (£) Based on large store format	10,000	10,000	10,000	10,000	10,000
Capacity for new floorspace (sqm net)	0	3,352	3,955	4,476	4,402

TABLE 65
FUTURE SHOP FLOORSPACE CAPACITY FOR SOUTH EAST SUB AREA

	CONVENIENCE GOODS				
	2008	2011	2016	2021	2026
Total Convenience Goods Turnover in LB Barnet (£000)	58,492	59,219	60,780	63,744	63,326
Existing Shop Floorspace (sqm net)	9,570	9,570	9,570	9,570	9,570
Sales per sqm net £	6,112	6,587	6,587	6,587	6,587
Sales from Existing Floorspace (£000)	58,492	63,042	63,042	63,042	63,042
Sales from Committed Floorspace (£000)	0	1,231	1,249	1,268	1,287
Residual Spending to Support new shops (£000)	0	-5,054	-3,511	-566	-1,003
Sales per sqm net in new shops (£) Based on large store format	10,000	10,000	10,000	10,000	10,000
Capacity for new floorspace (sqm net)	0	-505	-351	-57	-100

TABLE 66
FUTURE SHOP FLOORSPACE CAPACITY FOR SOUTH WEST SUB AREA

	CONVENIENCE GOODS				
	2008	2011	2016	2021	2026
Total Convenience Goods Turnover in LB Barnet (£000)	47,726	49,853	55,785	58,262	59,647
Existing Shop Floorspace (sqm net)	12,740	12,740	12,740	12,740	12,740
Sales per sqm net £	3,746	6,440	6,440	6,440	6,440
Sales from Existing Floorspace (£000)	47,726	82,038	82,038	82,038	82,038
Sales from Committed Floorspace (£000)	0	1,703	1,728	1,755	1,781
Residual Spending to Support new shops (£000)	0	-33,888	-27,982	-25,531	-24,171
Sales per sqm net in new shops (£) Based on large store format	10,000	10,000	10,000	10,000	10,000
Capacity for new floorspace (sqm net)	0	-3,389	-2,798	-2,553	-2,417

LB BARNET
BOROUGH-WIDE TOWN CENTRES STUDY 2008

CAPACITY PROJECTIONS: CONVENIENCE GOODS

TABLE 67
FUTURE SHOP GLOBAL FLOORSPACE CAPACITY FOR LB BARNET - PIPELINE

	CONVENIENCE GOODS				
	2008	2011	2016	2021	2026
Total Convenience Goods Turnover in LB Barnet (£000)	497,691	508,034	539,409	557,430	566,588
Existing Shop Floorspace (sqm net)	68,856	68,856	68,856	68,856	68,856
Sales per sqm net £	7,228	7,292	7,292	7,292	7,292
Sales from Existing Floorspace (£000)	497,691	502,076	502,076	502,076	502,076
Sales from Committed & Pipeline Floorspace (£000)	0	113,716	183,658	186,430	189,243
Residual Spending to Support new shops (£000)	0	-107,757	-146,326	-131,076	-124,731
Sales per sqm net in new shops (£) Based on large store format	10,000	10,000	10,000	10,000	10,000
Capacity for new floorspace (sqm net)	0	-10,776	-14,633	-13,108	-12,473

TABLE 68
FUTURE SHOP FLOORSPACE CAPACITY FOR NORTH SUB AREA - PIPELINE

	CONVENIENCE GOODS				
	2008	2011	2016	2021	2026
Total Convenience Goods Turnover in LB Barnet (£000)	76,008	76,431	78,743	80,605	82,601
Existing Shop Floorspace (sqm net)	7,672	7,672	7,672	7,672	7,672
Sales per sqm net £	9,908	7,808	7,808	7,808	7,808
Sales from Existing Floorspace (£000)	76,008	59,900	59,900	59,900	59,900
Sales from Committed Floorspace (£000)	0	99,958	101,467	102,998	104,552
Residual Spending to Support new shops (£000)	0	-83,427	-82,624	-82,292	-81,851
Sales per sqm net in new shops (£) Based on large store format	10,000	10,000	10,000	10,000	10,000
Capacity for new floorspace (sqm net)	0	-8,343	-8,262	-8,229	-8,185

TABLE 69
FUTURE SHOP FLOORSPACE CAPACITY FOR WEST SUB AREA - PIPELINE

	CONVENIENCE GOODS				
	2008	2011	2016	2021	2026
Total Convenience Goods Turnover in LB Barnet (£000)	124,580	130,661	146,164	151,649	158,554
Existing Shop Floorspace (sqm net)	20,181	20,181	20,181	20,181	20,181
Sales per sqm net £	6,173	6,974	6,974	6,974	6,974
Sales from Existing Floorspace (£000)	124,580	140,739	140,739	140,739	140,739
Sales from Committed Floorspace (£000)	0	8,829	8,962	9,097	9,235
Residual Spending to Support new shops (£000)	0	-18,907	-3,537	1,812	8,580
Sales per sqm net in new shops (£) Based on large store format	10,000	10,000	10,000	10,000	10,000
Capacity for new floorspace (sqm net)	0	-1,891	-354	181	858

TABLE 70
FUTURE SHOP FLOORSPACE CAPACITY FOR EAST SUB AREA - PIPELINE

	CONVENIENCE GOODS				
	2008	2011	2016	2021	2026
Total Convenience Goods Turnover in LB Barnet (£000)	190,884	191,870	197,937	203,171	202,460
Existing Shop Floorspace (sqm net)	18,694	18,694	18,694	18,694	18,694
Sales per sqm net £	10,211	8,364	8,364	8,364	8,364
Sales from Existing Floorspace (£000)	190,884	156,357	156,357	156,357	156,357
Sales from Committed Floorspace (£000)	0	1,995	2,025	2,056	2,087
Residual Spending to Support new shops (£000)	0	33,518	39,555	44,758	44,016
Sales per sqm net in new shops (£) Based on large store format	10,000	10,000	10,000	10,000	10,000
Capacity for new floorspace (sqm net)	0	3,352	3,955	4,476	4,402

TABLE 71
FUTURE SHOP FLOORSPACE CAPACITY FOR SOUTH EAST SUB AREA - PIPELINE

	CONVENIENCE GOODS				
	2008	2011	2016	2021	2026
Total Convenience Goods Turnover in LB Barnet (£000)	58,492	59,219	60,780	63,744	63,326
Existing Shop Floorspace (sqm net)	9,570	9,570	9,570	9,570	9,570
Sales per sqm net £	6,112	6,587	6,587	6,587	6,587
Sales from Existing Floorspace (£000)	58,492	63,042	63,042	63,042	63,042
Sales from Committed Floorspace (£000)	0	1,231	1,249	1,268	1,287
Residual Spending to Support new shops (£000)	0	-5,054	-3,511	-566	-1,003
Sales per sqm net in new shops (£) Based on large store format	10,000	10,000	10,000	10,000	10,000
Capacity for new floorspace (sqm net)	0	-505	-351	-57	-100

TABLE 72
FUTURE SHOP FLOORSPACE CAPACITY FOR SOUTH WEST SUB AREA - PIPELINE

	CONVENIENCE GOODS				
	2008	2011	2016	2021	2026
Total Convenience Goods Turnover in LB Barnet (£000)	47,726	49,853	55,785	58,262	59,647
Existing Shop Floorspace (sqm net)	12,740	12,740	12,740	12,740	12,740
Sales per sqm net £	3,746	6,440	6,440	6,440	6,440
Sales from Existing Floorspace (£000)	47,726	82,038	82,038	82,038	82,038
Sales from Committed Floorspace (£000)	0	1,703	69,955	71,011	72,083
Residual Spending to Support new shops (£000)	0	-33,888	-96,208	-94,787	-94,473
Sales per sqm net in new shops (£) Based on large store format	10,000	10,000	10,000	10,000	10,000
Capacity for new floorspace (sqm net)	0	-3,389	-9,621	-9,479	-9,447

TABLE 73
FUTURE SHOP GLOBAL FLOORSPACE CAPACITY FOR LB BARNET - ONE SUPERSTORE

	CONVENIENCE GOODS				
	2008	2011	2016	2021	2026
Total Convenience Goods Turnover in LB Barnet (£000)	497,691	508,034	539,409	557,430	566,588
Existing Shop Floorspace (sqm net)	68,856	68,856	68,856	68,856	68,856
Sales per sqm net £	7,228	7,292	7,292	7,292	7,292
Sales from Existing Floorspace (£000)	497,691	502,076	502,076	502,076	502,076
Sales from Committed & Pipeline Floorspace (£000)	0	72,512	141,833	143,973	146,146
Residual Spending to Support new shops (£000)	0	-66,554	-104,500	-88,619	-81,634
Sales per sqm net in new shops (£) Based on large store format	10,000	10,000	10,000	10,000	10,000
Capacity for new floorspace (sqm net)	0	-6,655	-10,450	-8,862	-8,163

TABLE 74
FUTURE SHOP FLOORSPACE CAPACITY FOR NORTH SUB AREA SCENARIO - ONE SUPERSTORE

	CONVENIENCE GOODS				
	2008	2011	2016	2021	2026
Total Convenience Goods Turnover in LB Barnet (£000)	76,008	76,431	78,743	80,605	82,601
Existing Shop Floorspace (sqm net)	7,672	7,672	7,672	7,672	7,672
Sales per sqm net £	9,908	7,808	7,808	7,808	7,808
Sales from Existing Floorspace (£000)	76,008	59,900	59,900	59,900	59,900
Sales from Committed Floorspace (£000)	0	58,755	59,641	60,541	61,455
Residual Spending to Support new shops (£000)	0	-42,223	-40,798	-39,836	-38,753
Sales per sqm net in new shops (£) Based on large store format	10,000	10,000	10,000	10,000	10,000
Capacity for new floorspace (sqm net)	0	-4,222	-4,080	-3,984	-3,875

TABLE 75
FUTURE SHOP FLOORSPACE CAPACITY FOR WEST SUB AREA - SCENARIO

	CONVENIENCE GOODS				
	2008	2011	2016	2021	2026
Total Convenience Goods Turnover in LB Barnet (£000)	124,580	130,661	146,164	151,649	158,554
Existing Shop Floorspace (sqm net)	20,181	20,181	20,181	20,181	20,181
Sales per sqm net £	6,173	6,974	6,974	6,974	6,974
Sales from Existing Floorspace (£000)	124,580	140,739	140,739	140,739	140,739
Sales from Committed Floorspace (£000)	0	8,829	8,962	9,097	9,235
Residual Spending to Support new shops (£000)	0	-18,907	-3,537	1,812	8,580
Sales per sqm net in new shops (£) Based on large store format	10,000	10,000	10,000	10,000	10,000
Capacity for new floorspace (sqm net)	0	-1,891	-354	181	858

TABLE 76
FUTURE SHOP FLOORSPACE CAPACITY FOR EAST SUB AREA - SCENARIO

	CONVENIENCE GOODS				
	2008	2011	2016	2021	2026
Total Convenience Goods Turnover in LB Barnet (£000)	190,884	191,870	197,937	203,171	202,460
Existing Shop Floorspace (sqm net)	18,694	18,694	18,694	18,694	18,694
Sales per sqm net £	10,211	8,364	8,364	8,364	8,364
Sales from Existing Floorspace (£000)	190,884	156,357	156,357	156,357	156,357
Sales from Committed Floorspace (£000)	0	1,995	2,025	2,056	2,087
Residual Spending to Support new shops (£000)	0	33,518	39,555	44,758	44,016
Sales per sqm net in new shops (£) Based on large store format	10,000	10,000	10,000	10,000	10,000
Capacity for new floorspace (sqm net)	0	3,352	3,955	4,476	4,402

TABLE 77
FUTURE SHOP FLOORSPACE CAPACITY FOR SOUTH EAST SUB AREA - SCENARIO

	CONVENIENCE GOODS				
	2008	2011	2016	2021	2026
Total Convenience Goods Turnover in LB Barnet (£000)	58,492	59,219	60,780	63,744	63,326
Existing Shop Floorspace (sqm net)	9,570	9,570	9,570	9,570	9,570
Sales per sqm net £	6,112	6,587	6,587	6,587	6,587
Sales from Existing Floorspace (£000)	58,492	63,042	63,042	63,042	63,042
Sales from Committed Floorspace (£000)	0	1,231	1,249	1,268	1,287
Residual Spending to Support new shops (£000)	0	-5,054	-3,511	-566	-1,003
Sales per sqm net in new shops (£) Based on large store format	10,000	10,000	10,000	10,000	10,000
Capacity for new floorspace (sqm net)	0	-505	-351	-57	-100

TABLE 78
FUTURE SHOP FLOORSPACE CAPACITY FOR SOUTH WEST SUB AREA - SCENARIO

	CONVENIENCE GOODS				
	2008	2011	2016	2021	2026
Total Convenience Goods Turnover in LB Barnet (£000)	47,726	49,853	55,785	58,262	59,647
Existing Shop Floorspace (sqm net)	12,740	12,740	12,740	12,740	12,740
Sales per sqm net £	3,746	6,440	6,440	6,440	6,440
Sales from Existing Floorspace (£000)	47,726	82,038	82,038	82,038	82,038
Sales from Committed Floorspace (£000)	0	1,703	69,955	71,011	72,083
Residual Spending to Support new shops (£000)	0	-33,888	-96,208	-94,787	-94,473
Sales per sqm net in new shops (£) Based on large store format	10,000	10,000	10,000	10,000	10,000
Capacity for new floorspace (sqm net)	0	-3,389	-9,621	-9,479	-9,447

TABLE 79
FUTURE SHOP FLOORSPACE CAPACITY FOR NORTH SUB AREA
SCENARIO - THREE FOODSTORES

	CONVENIENCE GOODS				
	2008	2011	2016	2021	2026
Total Convenience Goods Turnover in LB Barnet (£000)	76,008	76,431	78,743	80,605	82,601
Existing Shop Floorspace (sqm net)	7,672	7,672	7,672	7,672	7,672
Sales per sqm net £	9,908	7,808	7,808	7,808	7,808
Sales from Existing Floorspace (£000)	76,008	59,900	59,900	59,900	59,900
Sales from Committed Floorspace (£000)	0	99,958	101,467	102,998	104,552
Residual Spending to Support new shops (£000)	0	-83,427	-82,624	-82,292	-81,851
Sales per sqm net in new shops (£) Based on large store format	10,000	10,000	10,000	10,000	10,000
Capacity for new floorspace (sqm net)	0	-8,343	-8,262	-8,229	-8,185

APPENDIX 4

CAPACITY PROJECTIONS: COMPARISON GOODS

LB BARNET
BOROUGH-WIDE TOWN CENTRES STUDY 2008

TABLE 1
SURVEY AREA POPULATION FORECASTS

Catchment Zone	Postcode Sector Groupings	2008	2011	2016	2021	2026
1	EN5 2/3/4/5	30,345	**30,618**	**31,812**	**31,939**	**32,163**
2	EN5 1, EN4 8/9, N20 8/9	36,134	**36,604**	**36,860**	**37,376**	**38,273**
3	N20 0, N11 1/2/3, N12 0/8/9	58,903	**58,667**	**58,609**	**58,374**	**59,133**
4	N12 7, NW7 1/2, NW4 1	25,692	**26,951**	**31,560**	**32,349**	**30,052**
5	N3, 1/2/3	25,840	**25,685**	**25,402**	**25,860**	**23,843**
6	N2 8/9, N10 1/2/3	38,773	**38,773**	**38,153**	**38,038**	**36,479**
7	N2 0, NW11 6, N6 4	20,651	**20,486**	**20,158**	**19,936**	**18,182**
8	NW7 3/4, HA8 7/8/9	41,142	**41,924**	**42,385**	**43,105**	**46,856**
9	HA8 0/5, NW9 0/5/6, NW4 4	59,034	**65,174**	**73,320**	**74,200**	**79,765**
10	NW4 2, NW3 7, NW11 0/7/8/9	38,235	**38,579**	**37,615**	**40,022**	**38,621**
11	NW4 3, NW2 1/6/7, NW9 7/8	50,861	**57,066**	**76,126**	**78,638**	**80,290**
12	WD6 1/2/3/4/5	34,584	35,141	36,240	37,688	38,983
13	EN4 0, N14 4/5/6/7	33,500	33,880	34,431	35,003	35,615
14	HA7 1/2/4, HA8 6, NW9 9	41,962	41,863	41,998	42,365	42,950
15	NW2 2/3/4/5, NW10 1, NW6 1/2/7, NW3 6	72,751	74,819	77,360	79,196	80,989
16	N6 5/6, N19 5, NW3 1/2/4/5, NW5 1/2	76,891	79,595	82,954	85,522	87,839
TOTAL		**685,298**	**705,824**	**744,982**	**759,612**	**770,032**

SOURCE: Experian Business Solutions, April 2008

TABLE 1A
POPULATION GROWTH RATES

Catchment Zone	2008-2011 (%)	2011-2016 (%)	2016-2021 (%)	2021-2026 (%)
1	0.9	3.9	0.4	0.7
2	1.3	0.7	1.4	2.4
3	-0.4	-0.1	-0.4	1.3
4	4.9	17.1	2.5	-7.1
5	-0.6	-1.1	1.8	-7.8
6	0.0	-1.6	-0.3	-4.1
7	-0.8	-1.6	-1.1	-8.8
8	1.9	1.1	1.7	8.7
9	10.4	12.5	1.2	7.5
10	0.9	-2.5	6.4	-3.5
11	12.2	33.4	3.3	2.1
12	1.6	3.1	4.0	3.4
13	1.1	1.6	1.7	1.7
14	-0.2	0.3	0.9	1.4
15	2.8	3.4	2.4	2.3
16	3.5	4.2	3.1	2.7
TOTAL	3.0	5.5	2.0	1.4

LB BARNET
BOROUGH-WIDE TOWN CENTRES STUDY 2008

TABLE 2
COMPARISON GOODS RETAIL EXPENDITURE FORECASTS PER CAPITA (2006 PRICES)

GROWTH IN PER CAPITA RETAIL EXPENDITURE: 3.70 %pa 2006-2026

ZONE	2006	Minus SFT at 8.3%	2008	Minus SFT at 11.3%	2011	Minus SFT at 13.4%	2016	Minus SFT at 13.9%	2021	Minus SFT at 13.9%	2026	Minus SFT at 13.9%
1	3,213	2,946	3,455	3,065	3,853	3,337	4,621	3,978	5,541	4,771	6,645	5,721
2	3,338	3,061	3,590	3,184	4,003	3,467	4,800	4,133	5,757	4,956	6,903	5,944
3	3,160	2,898	3,398	3,014	3,789	3,282	4,544	3,913	5,450	4,692	6,535	5,627
4	3,210	2,944	3,452	3,062	3,849	3,334	4,616	3,975	5,536	4,766	6,639	5,716
5	3,509	3,218	3,773	3,347	4,208	3,644	5,046	4,345	6,052	5,210	7,257	6,248
6	3,491	3,201	3,754	3,330	4,186	3,625	5,020	4,323	6,020	5,184	7,220	6,216
7	3,647	3,344	3,922	3,479	4,374	3,787	5,245	4,516	6,290	5,415	7,542	6,494
8	3,066	2,812	3,297	2,925	3,677	3,184	4,409	3,796	5,288	4,553	6,341	5,459
9	2,525	2,315	2,715	2,408	3,028	2,622	3,631	3,126	4,355	3,749	5,222	4,496
10	3,416	3,132	3,673	3,258	4,096	3,548	4,913	4,230	5,891	5,072	7,065	6,083
11	2,668	2,447	2,869	2,545	3,199	2,771	3,837	3,304	4,601	3,962	5,518	4,751
12	2,979	2,732	3,204	2,842	3,572	3,094	4,284	3,689	5,138	4,423	6,161	5,305
13	3,226	2,958	3,469	3,077	3,869	3,350	4,639	3,994	5,563	4,790	6,672	5,744
14	2,789	2,558	2,999	2,660	3,345	2,896	4,011	3,453	4,810	4,141	5,768	4,966
15	3,206	2,940	3,448	3,058	3,845	3,329	4,611	3,970	5,529	4,760	6,630	5,709
16	3,799	3,484	4,085	3,624	4,556	3,945	5,463	4,704	6,552	5,641	7,857	6,765

Source: Experian Business Strategies and Expenditure Data for LB Barnet

TABLE 3
SURVEY AREA COMPARISON GOODS RETAIL EXPENDITURE FORECASTS

ZONE	2008 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)
1	92,999	102,165	126,560	152,378	184,012
2	115,049	126,889	152,346	185,252	227,487
3	177,544	192,529	229,319	273,901	332,733
4	78,665	89,844	125,437	154,186	171,772
5	86,488	93,600	110,370	134,738	148,976
6	129,110	140,569	164,917	197,176	226,760
7	71,839	77,589	91,028	107,960	118,074
8	120,320	133,488	160,907	196,240	255,807
9	142,182	170,901	229,232	278,196	358,635
10	124,583	136,862	159,098	203,002	234,921
11	129,435	158,116	251,484	311,533	381,438
12	98,271	108,717	133,675	166,709	206,787
13	103,084	113,506	137,532	167,670	204,586
14	111,631	121,252	145,033	175,445	213,300
15	222,476	249,108	307,094	377,009	462,347
16	278,629	314,027	390,209	482,427	594,203
TOTAL	**2,082,307**	**2,329,161**	**2,914,240**	**3,563,821**	**4,321,837**

Source: Tables 1&2

LB BARNET
BOROUGH-WIDE TOWN CENTRES STUDY 2008

BRENT CROSS REGIONAL SHOPPING CENTRE

TABLE 4
COMPARISON GOODS MARKET SHARE (%)

	Brent Cross Regional Shopping Centre				
Catchment Zone	2008 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)
1	18.9	18.9	18.9	18.9	18.9
2	16.9	16.9	16.9	16.9	16.9
3	24.4	24.4	24.4	24.4	24.4
4	45.5	45.5	45.5	45.5	45.5
5	41.2	41.2	41.2	41.2	41.2
6	24.3	24.3	24.3	24.3	24.3
7	41.0	41.0	41.0	41.0	41.0
8	33.5	33.5	33.5	33.5	33.5
9	26.3	26.3	26.3	26.3	26.3
10	45.7	45.7	45.7	45.7	45.7
11	43.9	43.9	43.9	43.9	43.9
12	5.3	5.3	5.3	5.3	5.3
13	22.4	22.4	22.4	22.4	22.4
14	20.0	20.0	20.0	20.0	20.0
15	27.4	27.4	27.4	27.4	27.4
16	15.9	15.9	15.9	15.9	15.9

TABLE 5
COMPARISON GOODS SPEND (£)

	Brent Cross Regional Shopping Centre				
Catchment Zone	2008 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)
1	17,563	19,294	23,901	28,777	34,751
2	19,462	21,465	25,772	31,338	38,483
3	43,238	46,887	55,847	66,704	81,032
4	35,793	40,879	57,074	70,155	78,157
5	35,650	38,581	45,494	55,538	61,407
6	31,375	34,160	40,077	47,916	55,106
7	29,443	31,800	37,308	44,248	48,393
8	40,352	44,768	53,964	65,814	85,791
9	37,442	45,004	60,365	73,259	94,441
10	56,906	62,514	72,671	92,725	107,305
11	56,788	69,371	110,335	136,681	167,350
12	5,209	5,763	7,086	8,837	10,962
13	23,062	25,394	30,769	37,511	45,770
14	22,340	24,265	29,024	35,110	42,686
15	60,868	68,154	84,018	103,147	126,495
16	44,392	50,032	62,170	76,862	94,671
Sub Total	**559,883**	**628,333**	**795,875**	**974,622**	**1,172,798**
Inflow	139,971	157,083	198,969	243,656	293,200
TOTAL	**699,854**	**785,416**	**994,843**	**1,218,278**	**1,465,998**

Source: Tables 3 & 4

EDGWARE MAJOR CENTRE

TABLE 6
COMPARISON GOODS MARKET SHARE (%)

Catchment Zone	Edgware Major Centre 2008 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)
1	0.4	0.4	0.4	0.4	0.4
2	0.0	0.0	0.0	0.0	0.0
3	0.0	0.0	0.0	0.0	0.0
4	1.6	1.6	1.6	1.6	1.6
5	0.2	0.2	0.2	0.2	0.2
6	0.0	0.0	0.0	0.0	0.0
7	0.3	0.3	0.3	0.3	0.3
8	14.2	14.2	14.2	14.2	14.2
9	10.4	10.4	10.4	10.4	10.4
10	1.2	1.2	1.2	1.2	1.2
11	1.6	1.6	1.6	1.6	1.6
12	0.9	0.9	0.9	0.9	0.9
13	0.0	0.0	0.0	0.0	0.0
14	7.2	7.2	7.2	7.2	7.2
15	0.3	0.3	0.3	0.3	0.3
16	0.5	0.5	0.5	0.5	0.5

TABLE 7
COMPARISON GOODS SPEND (£)

Catchment Zone	Edgware Major Centre 2008 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)
1	362	398	493	594	717
2	0	0	0	0	0
3	0	0	0	0	0
4	1,233	1,408	1,965	2,416	2,691
5	140	151	178	217	240
6	0	0	0	0	0
7	211	228	268	317	347
8	17,074	18,942	22,833	27,847	36,299
9	14,716	17,689	23,726	28,794	37,120
10	1,484	1,630	1,895	2,418	2,798
11	2,084	2,546	4,049	5,016	6,142
12	888	982	1,207	1,506	1,868
13	0	0	0	0	0
14	8,044	8,737	10,450	12,642	15,369
15	714	800	986	1,211	1,485
16	1,411	1,591	1,976	2,443	3,010
Total	**48,360**	**55,101**	**70,028**	**85,421**	**108,086**

Source: Tables 3 & 6

LB BARNET

BOROUGH-WIDE TOWN CENTRES STUDY 2008

BRENT STREET DISTRICT CENTRE

TABLE 8

COMPARISON GOODS MARKET SHARE (%)

Catchment Zone	Brent Street District Centre 2008 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)
1	0.0	0.0	0.0	0.0	0.0
2	0.0	0.0	0.0	0.0	0.0
3	0.0	0.0	0.0	0.0	0.0
4	0.5	0.5	0.5	0.5	0.5
5	0.0	0.0	0.0	0.0	0.0
6	0.0	0.0	0.0	0.0	0.0
7	0.0	0.0	0.0	0.0	0.0
8	0.0	0.0	0.0	0.0	0.0
9	0.0	0.0	0.0	0.0	0.0
10	0.1	0.1	0.1	0.1	0.1
11	0.0	0.0	0.0	0.0	0.0
12	0.0	0.0	0.0	0.0	0.0
13	0.0	0.0	0.0	0.0	0.0
14	0.1	0.1	0.1	0.1	0.1
15	0.0	0.0	0.0	0.0	0.0
16	0.2	0.2	0.2	0.2	0.2

TABLE 9

COMPARISON GOODS SPEND (£)

Catchment Zone	Brent Street District Centre 2008 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)
1	0	0	0	0	0
2	0	0	0	0	0
3	0	0	0	0	0
4	393	449	627	770	858
5	0	0	0	0	0
6	0	0	0	0	0
7	0	0	0	0	0
8	0	0	0	0	0
9	0	0	0	0	0
10	137	151	175	223	259
11	0	0	0	0	0
12	0	0	0	0	0
13	0	0	0	0	0
14	115	125	150	181	220
15	0	0	0	0	0
16	573	645	802	992	1,221
Total	**1,218**	**1,370**	**1,753**	**2,166**	**2,558**

Source: Tables 3 & 8

CHIPPING BARNET DISTRICT CENTRE

TABLE 10
COMPARISON GOODS MARKET SHARE (%)

Catchment Zone	Chipping Barnet District Centre 2008 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)
1	11.7	11.7	11.7	11.7	11.7
2	6.1	6.1	6.1	6.1	6.1
3	0.8	0.8	0.8	0.8	0.8
4	0.3	0.3	0.3	0.3	0.3
5	0.0	0.0	0.0	0.0	0.0
6	0.3	0.3	0.3	0.3	0.3
7	0.3	0.3	0.3	0.3	0.3
8	0.0	0.0	0.0	0.0	0.0
9	0.0	0.0	0.0	0.0	0.0
10	0.0	0.0	0.0	0.0	0.0
11	0.0	0.0	0.0	0.0	0.0
12	0.1	0.1	0.1	0.1	0.1
13	0.7	0.7	0.7	0.7	0.7
14	0.0	0.0	0.0	0.0	0.0
15	0.0	0.0	0.0	0.0	0.0
16	0.0	0.0	0.0	0.0	0.0

TABLE 11
COMPARISON GOODS SPEND (£)

Catchment Zone	Chipping Barnet District Centre 2008 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)
1	10,839	11,908	14,751	17,760	21,447
2	7,057	7,784	9,345	11,364	13,955
3	1,437	1,559	1,857	2,217	2,694
4	231	264	369	453	505
5	0	0	0	0	0
6	399	434	509	609	700
7	240	259	304	361	394
8	0	0	0	0	0
9	0	0	0	0	0
10	0	0	0	0	0
11	0	0	0	0	0
12	125	138	169	211	262
13	753	829	1,005	1,225	1,495
14	0	0	0	0	0
15	0	0	0	0	0
16	0	0	0	0	0
Total	**21,081**	**23,174**	**28,309**	**34,200**	**41,451**

Source: Tables 3 & 10

LB BARNET
BOROUGH-WIDE TOWN CENTRES STUDY 2008

CHURCH END, FINCHLEY DISTRICT CENTRE

TABLE 12
COMPARISON GOODS MARKET SHARE (%)

Catchment Zone	Church End, Finchley District Centre 2008 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)
1	0.0	0.0	0.0	0.0	0.0
2	0.1	0.1	0.1	0.1	0.1
3	0.0	0.0	0.0	0.0	0.0
4	0.1	0.1	0.1	0.1	0.1
5	1.3	1.3	1.3	1.3	1.3
6	0.2	0.2	0.2	0.2	0.2
7	0.3	0.3	0.3	0.3	0.3
8	0.0	0.0	0.0	0.0	0.0
9	0.0	0.0	0.0	0.0	0.0
10	0.3	0.3	0.3	0.3	0.3
11	0.0	0.0	0.0	0.0	0.0
12	0.0	0.0	0.0	0.0	0.0
13	0.1	0.1	0.1	0.1	0.1
14	0.4	0.4	0.4	0.4	0.4
15	0.0	0.0	0.0	0.0	0.0
16	0.5	0.5	0.5	0.5	0.5

TABLE 13
COMPARISON GOODS SPEND (£)

Catchment Zone	Church End, Finchley District Centre 2008 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)
1	0	0	0	0	0
2	103	113	136	166	203
3	0	0	0	0	0
4	76	87	121	148	165
5	1,090	1,180	1,391	1,698	1,878
6	322	351	412	492	566
7	182	196	230	273	299
8	0	0	0	0	0
9	0	0	0	0	0
10	366	402	468	597	691
11	0	0	0	0	0
12	0	0	0	0	0
13	99	109	132	161	197
14	404	439	525	635	772
15	0	0	0	0	0
16	1,411	1,591	1,976	2,443	3,010
Total	**4,053**	**4,468**	**5,391**	**6,614**	**7,780**

Source: Tables 3 & 12

LB BARNET

BOROUGH-WIDE TOWN CENTRES STUDY 2008

EAST FINCHLEY DISTRICT CENTRE

TABLE 14
COMPARISON GOODS MARKET SHARE (%)

	East Finchley District Centre				
Catchment Zone	2008 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)
1	0.1	0.1	0.1	0.1	0.1
2	0.3	0.3	0.3	0.3	0.3
3	0.4	0.4	0.4	0.4	0.4
4	0.3	0.3	0.3	0.3	0.3
5	1.8	1.8	1.8	1.8	1.8
6	2.6	2.6	2.6	2.6	2.6
7	1.9	1.9	1.9	1.9	1.9
8	0.0	0.0	0.0	0.0	0.0
9	0.0	0.0	0.0	0.0	0.0
10	0.1	0.1	0.1	0.1	0.1
11	0.2	0.2	0.2	0.2	0.2
12	0.0	0.0	0.0	0.0	0.0
13	0.0	0.0	0.0	0.0	0.0
14	0.0	0.0	0.0	0.0	0.0
15	0.6	0.6	0.6	0.6	0.6
16	0.8	0.8	0.8	0.8	0.8

TABLE 15
COMPARISON GOODS SPEND (£)

	East Finchley District Centre				
Catchment Zone	2008 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)
1	139	153	190	228	276
2	332	366	439	534	656
3	669	725	863	1,031	1,253
4	231	264	369	453	505
5	1,521	1,646	1,941	2,369	2,620
6	3,413	3,716	4,360	5,213	5,995
7	1,348	1,456	1,709	2,026	2,216
8	0	0	0	0	0
9	0	0	0	0	0
10	137	151	175	223	259
11	224	273	435	539	659
12	0	0	0	0	0
13	0	0	0	0	0
14	0	0	0	0	0
15	1,280	1,433	1,767	2,169	2,660
16	2,122	2,392	2,972	3,675	4,526
Total	**11,416**	**12,575**	**15,219**	**18,461**	**21,624**

Source: Tables 3 & 14

MILL HILL DISTRICT CENTRE

TABLE 16
COMPARISON GOODS MARKET SHARE (%)

	Mill Hill District Centre				
Catchment Zone	2008 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)
1	1.0	1.0	1.0	1.0	1.0
2	0.1	0.1	0.1	0.1	0.1
3	0.3	0.3	0.3	0.3	0.3
4	4.8	4.8	4.8	4.8	4.8
5	0.5	0.5	0.5	0.5	0.5
6	0.0	0.0	0.0	0.0	0.0
7	0.4	0.4	0.4	0.4	0.4
8	6.2	6.2	6.2	6.2	6.2
9	3.5	3.5	3.5	3.5	3.5
10	1.0	1.0	1.0	1.0	1.0
11	1.5	1.5	1.5	1.5	1.5
12	0.6	0.6	0.6	0.6	0.6
13	0.0	0.0	0.0	0.0	0.0
14	0.3	0.3	0.3	0.3	0.3
15	0.7	0.7	0.7	0.7	0.7
16	0.0	0.0	0.0	0.0	0.0

TABLE 17
COMPARISON GOODS SPEND (£)

	Mill Hill District Centre				
Catchment Zone	2008 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)
1	887	974	1,207	1,453	1,755
2	172	190	228	278	341
3	548	594	708	845	1,027
4	3,807	4,348	6,070	7,462	8,313
5	458	496	585	714	789
6	0	0	0	0	0
7	301	325	382	453	495
8	7,481	8,300	10,005	12,202	15,905
9	4,909	5,901	7,915	9,605	12,382
10	1,242	1,365	1,587	2,024	2,343
11	1,906	2,329	3,704	4,588	5,618
12	572	633	779	971	1,204
13	0	0	0	0	0
14	376	409	489	591	719
15	1,480	1,658	2,043	2,509	3,077
16	0	0	0	0	0
Total	**24,142**	**27,521**	**35,701**	**43,695**	**53,968**

Source: Tables 3 & 16

LB BARNET

BOROUGH-WIDE TOWN CENTRES STUDY 2008

COLINDALE DISTRICT CENTRE

TABLE 18
COMPARISON GOODS MARKET SHARE (%)

	Colindale District Centre				
Catchment Zone	2008 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)
1	0.0	0.0	0.0	0.0	0.0
2	0.0	0.0	0.0	0.0	0.0
3	0.0	0.0	0.0	0.0	0.0
4	0.7	0.7	0.7	0.7	0.7
5	0.0	0.0	0.0	0.0	0.0
6	0.0	0.0	0.0	0.0	0.0
7	0.0	0.0	0.0	0.0	0.0
8	0.0	0.0	0.0	0.0	0.0
9	1.7	1.7	1.7	1.7	1.7
10	0.0	0.0	0.0	0.0	0.0
11	1.4	1.4	1.4	1.4	1.4
12	0.0	0.0	0.0	0.0	0.0
13	0.0	0.0	0.0	0.0	0.0
14	0.7	0.7	0.7	0.7	0.7
15	0.0	0.0	0.0	0.0	0.0
16	0.0	0.0	0.0	0.0	0.0

TABLE 19
COMPARISON GOODS SPEND (£)

	Colindale District Centre				
Catchment Zone	2008 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)
1	0	0	0	0	0
2	0	0	0	0	0
3	0	0	0	0	0
4	538	614	857	1,054	1,174
5	0	0	0	0	0
6	0	0	0	0	0
7	0	0	0	0	0
8	0	0	0	0	0
9	2,381	2,861	3,838	4,658	6,005
10	0	0	0	0	0
11	1,822	2,225	3,539	4,385	5,368
12	0	0	0	0	0
13	0	0	0	0	0
14	732	795	951	1,150	1,399
15	0	0	0	0	0
16	0	0	0	0	0
Total	**5,472**	**6,496**	**9,186**	**11,247**	**13,946**

Source: Tables 3 & 18

LB BARNET
BOROUGH-WIDE TOWN CENTRES STUDY 2008

TEMPLE FORTUNE DISTRICT CENTRE

TABLE 20
COMPARISON GOODS MARKET SHARE (%)

Catchment Zone	Temple Fortune District Centre 2008 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)
1	0.0	0.0	0.0	0.0	0.0
2	0.0	0.0	0.0	0.0	0.0
3	0.0	0.0	0.0	0.0	0.0
4	0.0	0.0	0.0	0.0	0.0
5	0.0	0.0	0.0	0.0	0.0
6	0.0	0.0	0.0	0.0	0.0
7	3.6	3.6	3.6	3.6	3.6
8	0.0	0.0	0.0	0.0	0.0
9	0.0	0.0	0.0	0.0	0.0
10	1.6	1.6	1.6	1.6	1.6
11	0.0	0.0	0.0	0.0	0.0
12	0.0	0.0	0.0	0.0	0.0
13	0.0	0.0	0.0	0.0	0.0
14	0.0	0.0	0.0	0.0	0.0
15	0.0	0.0	0.0	0.0	0.0
16	0.0	0.0	0.0	0.0	0.0

TABLE 21
COMPARISON GOODS SPEND (£)

Catchment Zone	Temple Fortune District Centre 2008 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)
1	0	0	0	0	0
2	0	0	0	0	0
3	0	0	0	0	0
4	0	0	0	0	0
5	0	0	0	0	0
6	0	0	0	0	0
7	2,613	2,823	3,311	3,927	4,295
8	0	0	0	0	0
9	0	0	0	0	0
10	1,979	2,174	2,528	3,225	3,732
11	0	0	0	0	0
12	0	0	0	0	0
13	0	0	0	0	0
14	0	0	0	0	0
15	0	0	0	0	0
16	0	0	0	0	0
Total	**4,593**	**4,997**	**5,839**	**7,153**	**8,028**

Source: Tables 3 & 18

BURNT OAK DISTRICT CENTRE

TABLE 22
COMPARISON GOODS MARKET SHARE (%)

Catchment Zone	Burnt Oak District Centre 2008 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)
1	0.0	0.0	0.0	0.0	0.0
2	0.0	0.0	0.0	0.0	0.0
3	0.0	0.0	0.0	0.0	0.0
4	0.0	0.0	0.0	0.0	0.0
5	0.0	0.0	0.0	0.0	0.0
6	0.0	0.0	0.0	0.0	0.0
7	0.3	0.3	0.3	0.3	0.3
8	0.3	0.3	0.3	0.3	0.3
9	2.9	2.9	2.9	2.9	2.9
10	0.6	0.6	0.6	0.6	0.6
11	0.5	0.5	0.5	0.5	0.5
12	0.2	0.2	0.2	0.2	0.2
13	0.0	0.0	0.0	0.0	0.0
14	0.0	0.0	0.0	0.0	0.0
15	0.0	0.0	0.0	0.0	0.0
16	0.0	0.0	0.0	0.0	0.0

TABLE 23
COMPARISON GOODS SPEND (£)

Catchment Zone	Burnt Oak District Centre 2008 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)
1	0	0	0	0	0
2	0	0	0	0	0
3	0	0	0	0	0
4	0	0	0	0	0
5	0	0	0	0	0
6	0	0	0	0	0
7	211	228	268	317	347
8	322	357	430	524	684
9	4,086	4,911	6,587	7,994	10,306
10	699	768	893	1,139	1,319
11	607	741	1,179	1,460	1,788
12	177	196	240	300	372
13	0	0	0	0	0
14	0	0	0	0	0
15	0	0	0	0	0
16	0	0	0	0	0
Total	**6,101**	**7,201**	**9,597**	**11,736**	**14,815**

Source: Tables 3 & 20

CRICKLEWOOD DISTRICT CENTRE

TABLE 24
COMPARISON GOODS MARKET SHARE (%)

Catchment Zone	Cricklewood District Centre 2008 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)
1	0.0	0.0	0.0	0.0	0.0
2	0.2	0.2	0.2	0.2	0.2
3	0.0	0.0	0.0	0.0	0.0
4	0.4	0.4	0.4	0.4	0.4
5	0.0	0.0	0.0	0.0	0.0
6	0.0	0.0	0.0	0.0	0.0
7	1.1	1.1	1.1	1.1	1.1
8	0.0	0.0	0.0	0.0	0.0
9	0.0	0.0	0.0	0.0	0.0
10	0.3	0.3	0.3	0.3	0.3
11	5.2	5.2	5.2	5.2	5.2
12	0.0	0.0	0.0	0.0	0.0
13	0.0	0.0	0.0	0.0	0.0
14	0.6	0.6	0.6	0.6	0.6
15	1.7	1.7	1.7	1.7	1.7
16	0.0	0.0	0.0	0.0	0.0

TABLE 25
COMPARISON GOODS SPEND (£)

Catchment Zone	Cricklewood District Centre 2008 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)
1	0	0	0	0	0
2	229	252	303	368	452
3	0	0	0	0	0
4	285	326	455	559	623
5	0	0	0	0	0
6	0	0	0	0	0
7	788	851	998	1,184	1,295
8	0	0	0	0	0
9	0	0	0	0	0
10	380	418	486	620	717
11	6,764	8,263	13,142	16,280	19,933
12	0	0	0	0	0
13	0	0	0	0	0
14	620	673	806	974	1,185
15	3,728	4,175	5,146	6,318	7,748
16	0	0	0	0	0
Total	**12,795**	**14,958**	**21,336**	**26,304**	**31,954**

Source: Tables 3 & 22

NORTH FINCHLEY DISTRICT CENTRE

TABLE 26
COMPARISON GOODS MARKET SHARE (%)

	North Finchley District Centre				
Catchment Zone	2008 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)
1	2.9	2.9	2.9	2.9	2.9
2	4.6	4.6	4.6	4.6	4.6
3	13.3	13.3	13.3	13.3	13.3
4	6.3	6.3	6.3	6.3	6.3
5	9.7	9.7	9.7	9.7	9.7
6	5.0	5.0	5.0	5.0	5.0
7	3.9	3.9	3.9	3.9	3.9
8	0.4	0.4	0.4	0.4	0.4
9	1.7	1.7	1.7	1.7	1.7
10	1.0	1.0	1.0	1.0	1.0
11	0.0	0.0	0.0	0.0	0.0
12	0.0	0.0	0.0	0.0	0.0
13	0.8	0.8	0.8	0.8	0.8
14	0.0	0.0	0.0	0.0	0.0
15	0.6	0.6	0.6	0.6	0.6
16	2.1	2.1	2.1	2.1	2.1

TABLE 27
COMPARISON GOODS SPEND (£)

	North Finchley District Centre				
Catchment Zone	2008 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)
1	2,664	2,926	3,625	4,365	5,271
2	5,235	5,774	6,932	8,430	10,352
3	23,693	25,693	30,602	36,551	44,403
4	4,945	5,648	7,885	9,692	10,798
5	8,401	9,092	10,721	13,088	14,470
6	6,444	7,016	8,231	9,841	11,317
7	2,783	3,006	3,527	4,183	4,574
8	435	483	582	710	925
9	2,388	2,870	3,850	4,672	6,023
10	1,237	1,358	1,579	2,015	2,332
11	0	0	0	0	0
12	0	0	0	0	0
13	813	895	1,084	1,322	1,613
14	0	0	0	0	0
15	1,238	1,386	1,709	2,098	2,573
16	5,821	6,561	8,152	10,079	12,414
Total	**66,096**	**72,707**	**88,479**	**107,045**	**127,065**

Source: Tables 3 & 24

NEW BARNET DISTRICT CENTRE

TABLE 28
COMPARISON GOODS MARKET SHARE (%)

	New Barnet District Centre				
Catchment Zone	2008 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)
1	0.0	0.0	0.0	0.0	0.0
2	1.4	1.4	1.4	1.4	1.4
3	0.5	0.5	0.5	0.5	0.5
4	0.4	0.4	0.4	0.4	0.4
5	0.0	0.0	0.0	0.0	0.0
6	0.9	0.9	0.9	0.9	0.9
7	0.6	0.6	0.6	0.6	0.6
8	0.0	0.0	0.0	0.0	0.0
9	0.2	0.2	0.2	0.2	0.2
10	0.2	0.2	0.2	0.2	0.2
11	0.5	0.5	0.5	0.5	0.5
12	0.0	0.0	0.0	0.0	0.0
13	0.7	0.7	0.7	0.7	0.7
14	0.0	0.0	0.0	0.0	0.0
15	0.0	0.0	0.0	0.0	0.0
16	0.0	0.0	0.0	0.0	0.0

TABLE 29
COMPARISON GOODS SPEND (£)

	New Barnet District Centre				
Catchment Zone	2008 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)
1	0	0	0	0	0
2	1,660	1,831	2,198	2,673	3,283
3	845	916	1,091	1,303	1,583
4	313	358	500	614	684
5	0	0	0	0	0
6	1,225	1,334	1,565	1,871	2,152
7	457	494	579	687	752
8	0	0	0	0	0
9	262	315	423	513	662
10	208	229	266	339	392
11	672	821	1,306	1,618	1,981
12	0	0	0	0	0
13	753	829	1,005	1,225	1,495
14	0	0	0	0	0
15	0	0	0	0	0
16	0	0	0	0	0
Total	**6,397**	**7,127**	**8,933**	**10,844**	**12,983**

Source: Tables 3 & 26

LB BARNET

BOROUGH-WIDE TOWN CENTRES STUDY 2008

WHETSTONE DISTRICT CENTRE

TABLE 30
COMPARISON GOODS MARKET SHARE (%)

	Whetstone District Centre				
Catchment Zone	2008 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)
1	1.4	1.4	1.4	1.4	1.4
2	1.6	1.6	1.6	1.6	1.6
3	1.5	1.5	1.5	1.5	1.5
4	1.0	1.0	1.0	1.0	1.0
5	0.2	0.2	0.2	0.2	0.2
6	0.5	0.5	0.5	0.5	0.5
7	0.0	0.0	0.0	0.0	0.0
8	0.1	0.1	0.1	0.1	0.1
9	0.0	0.0	0.0	0.0	0.0
10	0.0	0.0	0.0	0.0	0.0
11	0.0	0.0	0.0	0.0	0.0
12	0.0	0.0	0.0	0.0	0.0
13	0.0	0.0	0.0	0.0	0.0
14	0.1	0.1	0.1	0.1	0.1
15	0.0	0.0	0.0	0.0	0.0
16	0.0	0.0	0.0	0.0	0.0

TABLE 31
COMPARISON GOODS SPEND (£)

	Whetstone District Centre				
Catchment Zone	2008 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)
1	1,293	1,421	1,760	2,119	2,559
2	1,858	2,050	2,461	2,992	3,675
3	2,623	2,844	3,388	4,047	4,916
4	775	885	1,235	1,518	1,691
5	167	180	213	260	287
6	687	748	878	1,049	1,207
7	0	0	0	0	0
8	166	185	223	271	354
9	0	0	0	0	0
10	0	0	0	0	0
11	0	0	0	0	0
12	0	0	0	0	0
13	0	0	0	0	0
14	154	168	201	243	295
15	0	0	0	0	0
16	0	0	0	0	0
Total	**7,724**	**8,480**	**10,357**	**12,499**	**14,983**

Source: Tables 3 & 28

HENDON CENTRAL DISTRICT CENTRE

TABLE 32
COMPARISON GOODS MARKET SHARE (%)

	Hendon Central District Centre				
Catchment Zone	2008 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)
1	0.0	0.0	0.0	0.0	0.0
2	0.0	0.0	0.0	0.0	0.0
3	0.0	0.0	0.0	0.0	0.0
4	1.1	1.1	1.1	1.1	1.1
5	0.0	0.0	0.0	0.0	0.0
6	0.0	0.0	0.0	0.0	0.0
7	0.0	0.0	0.0	0.0	0.0
8	0.9	0.9	0.9	0.9	0.9
9	1.1	1.1	1.1	1.1	1.1
10	1.2	1.2	1.2	1.2	1.2
11	5.7	5.7	5.7	5.7	5.7
12	0.0	0.0	0.0	0.0	0.0
13	0.0	0.0	0.0	0.0	0.0
14	0.3	0.3	0.3	0.3	0.3
15	0.0	0.0	0.0	0.0	0.0
16	0.0	0.0	0.0	0.0	0.0

TABLE 33
COMPARISON GOODS SPEND (£)

	Hendon Central District Centre				
Catchment Zone	2008 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)
1	0	0	0	0	0
2	0	0	0	0	0
3	0	0	0	0	0
4	867	991	1,383	1,700	1,894
5	0	0	0	0	0
6	0	0	0	0	0
7	0	0	0	0	0
8	1,034	1,147	1,382	1,686	2,198
9	1,576	1,895	2,541	3,084	3,976
10	1,466	1,611	1,872	2,389	2,765
11	7,418	9,061	14,412	17,853	21,859
12	0	0	0	0	0
13	0	0	0	0	0
14	337	366	438	530	644
15	0	0	0	0	0
16	0	0	0	0	0
Total	**12,698**	**15,070**	**22,029**	**27,242**	**33,336**

Source: Tables 3 & 30

GOLDERS GREEN DISTRICT CENTRE

TABLE 34
COMPARISON GOODS MARKET SHARE (%)

	Golders Green District Centre				
Catchment Zone	2008 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)
1	0.0	0.0	0.0	0.0	0.0
2	0.0	0.0	0.0	0.0	0.0
3	0.0	0.0	0.0	0.0	0.0
4	0.3	0.3	0.3	0.3	0.3
5	0.0	0.0	0.0	0.0	0.0
6	0.0	0.0	0.0	0.0	0.0
7	0.3	0.3	0.3	0.3	0.3
8	0.3	0.3	0.3	0.3	0.3
9	0.4	0.4	0.4	0.4	0.4
10	2.1	2.1	2.1	2.1	2.1
11	0.0	0.0	0.0	0.0	0.0
12	0.0	0.0	0.0	0.0	0.0
13	0.0	0.0	0.0	0.0	0.0
14	0.0	0.0	0.0	0.0	0.0
15	0.4	0.4	0.4	0.4	0.4
16	0.0	0.0	0.0	0.0	0.0

TABLE 35
COMPARISON GOODS SPEND (£)

	Golders Green District Centre				
Catchment Zone	2008 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)
1	0	0	0	0	0
2	0	0	0	0	0
3	0	0	0	0	0
4	231	264	369	453	505
5	0	0	0	0	0
6	0	0	0	0	0
7	240	259	304	361	394
8	322	357	430	524	684
9	514	618	829	1,006	1,297
10	2,594	2,850	3,313	4,227	4,891
11	0	0	0	0	0
12	0	0	0	0	0
13	0	0	0	0	0
14	0	0	0	0	0
15	867	970	1,196	1,469	1,801
16	0	0	0	0	0
Total	**4,768**	**5,318**	**6,441**	**8,040**	**9,573**

Source: Tables 3 & 32

OUT OF CENTRE

TABLE 36
COMPARISON GOODS MARKET SHARE (%)

	Friern Bridge Retail Park				
Catchment Zone	2008 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)
1	2.6	2.6	2.6	2.6	2.6
2	5.3	5.3	5.3	5.3	5.3
3	6.7	6.7	6.7	6.7	6.7
4	0.8	0.8	0.8	0.8	0.8
5	1.9	1.9	1.9	1.9	1.9
6	5.3	5.3	5.3	5.3	5.3
7	1.9	1.9	1.9	1.9	1.9
8	0.2	0.2	0.2	0.2	0.2
9	0.5	0.5	0.5	0.5	0.5
10	0.3	0.3	0.3	0.3	0.3
11	0.0	0.0	0.0	0.0	0.0
12	0.0	0.0	0.0	0.0	0.0
13	1.5	1.5	1.5	1.5	1.5
14	0.6	0.6	0.6	0.6	0.6
15	0.5	0.5	0.5	0.5	0.5
16	0.7	0.7	0.7	0.7	0.7

TABLE 37
COMPARISON GOODS SPEND (£)

	Friern Bridge Retail Park				
Catchment Zone	2008 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)
1	2,404	2,641	3,272	3,939	4,757
2	6,078	6,703	8,048	9,786	12,017
3	11,967	12,977	15,456	18,461	22,427
4	665	759	1,060	1,303	1,451
5	1,664	1,801	2,123	2,592	2,866
6	6,871	7,481	8,777	10,494	12,068
7	1,368	1,477	1,733	2,055	2,248
8	300	333	402	490	638
9	718	863	1,157	1,404	1,810
10	380	418	486	620	717
11	0	0	0	0	0
12	0	0	0	0	0
13	1,541	1,696	2,055	2,506	3,058
14	620	673	806	974	1,185
15	1,118	1,252	1,543	1,895	2,323
16	2,073	2,336	2,903	3,589	4,420
Sub Total	37,765	41,410	49,820	60,107	71,986
Inflow	12,588	13,803	16,607	20,036	23,995
TOTAL	50,354	55,213	66,427	80,143	95,981

Source: Tables 3 & 32

TABLE 38
COMPARISON GOODS MARKET SHARE (%)

	Stapes Corner Retail Park				
Catchment Zone	2008 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)
1	0.0	0.0	0.0	0.0	0.0
2	0.2	0.2	0.2	0.2	0.2
3	0.0	0.0	0.0	0.0	0.0
4	0.2	0.2	0.2	0.2	0.2
5	0.4	0.4	0.4	0.4	0.4
6	0.0	0.0	0.0	0.0	0.0
7	0.4	0.4	0.4	0.4	0.4
8	0.3	0.3	0.3	0.3	0.3
9	0.9	0.9	0.9	0.9	0.9
10	1.6	1.6	1.6	1.6	1.6
11	0.9	0.9	0.9	0.9	0.9
12	0.2	0.2	0.2	0.2	0.2
13	0.0	0.0	0.0	0.0	0.0
14	0.0	0.0	0.0	0.0	0.0
15	1.4	1.4	1.4	1.4	1.4
16	0.6	0.6	0.6	0.6	0.6

TABLE 39
COMPARISON GOODS SPEND (£)

	Stapes Corner Retail Park				
Catchment Zone	2008 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)
1	0	0	0	0	0
2	229	252	303	368	452
3	0	0	0	0	0
4	168	191	267	328	366
5	306	331	391	477	527
6	0	0	0	0	0
7	316	341	401	475	520
8	371	412	497	606	790
9	1,303	1,566	2,100	2,549	3,286
10	2,047	2,249	2,614	3,335	3,860
11	1,204	1,471	2,340	2,899	3,549
12	181	201	247	308	382
13	0	0	0	0	0
14	0	0	0	0	0
15	3,134	3,509	4,326	5,310	6,512
16	1,718	1,937	2,406	2,975	3,665
Total	10,977	12,460	15,891	19,630	23,908
Inflow	7,318	8,307	10,594	13,087	15,939
TOTAL	18,295	20,767	26,485	32,717	39,846

Source: Tables 3 & 32

TABLE 40
COMPARISON GOODS MARKET SHARE (%)

	Pentavia Retail Park				
Catchment Zone	2008 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)
1	0.3	0.3	0.3	0.3	0.3
2	0.0	0.0	0.0	0.0	0.0
3	0.3	0.3	0.3	0.3	0.3
4	0.5	0.5	0.5	0.5	0.5
5	0.6	0.6	0.6	0.6	0.6
6	0.0	0.0	0.0	0.0	0.0
7	0.0	0.0	0.0	0.0	0.0
8	1.4	1.4	1.4	1.4	1.4
9	0.0	0.0	0.0	0.0	0.0
10	0.0	0.0	0.0	0.0	0.0
11	0.0	0.0	0.0	0.0	0.0
12	0.0	0.0	0.0	0.0	0.0
13	0.0	0.0	0.0	0.0	0.0
14	0.0	0.0	0.0	0.0	0.0
15	0.0	0.0	0.0	0.0	0.0
16	0.2	0.2	0.2	0.2	0.2

TABLE 41
COMPARISON GOODS SPEND (£)

	Pentavia Retail Park				
Catchment Zone	2008 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)
1	311	342	423	510	615
2	0	0	0	0	0
3	548	594	708	845	1,027
4	361	412	576	708	789
5	520	563	664	810	896
6	0	0	0	0	0
7	0	0	0	0	0
8	1,696	1,882	2,268	2,766	3,606
9	0	0	0	0	0
10	0	0	0	0	0
11	0	0	0	0	0
12	0	0	0	0	0
13	0	0	0	0	0
14	0	0	0	0	0
15	0	0	0	0	0
16	633	713	886	1,096	1,350
Total	4,069	4,506	5,525	6,735	8,282

Source: Tables 3 & 32

OUT OF CENTRE

TABLE 42
COMPARISON GOODS MARKET SHARE (%)

Catchment Zone	Silk Bridge Retail Park 2008 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)
1	0.0	0.0	0.0	0.0	0.0
2	0.0	0.0	0.0	0.0	0.0
3	0.0	0.0	0.0	0.0	0.0
4	0.5	0.5	0.5	0.5	0.5
5	0.4	0.4	0.4	0.4	0.4
6	0.0	0.0	0.0	0.0	0.0
7	0.4	0.4	0.4	0.4	0.4
8	0.5	0.5	0.5	0.5	0.5
9	3.5	3.5	3.5	3.5	3.5
10	0.2	0.2	0.2	0.2	0.2
11	2.4	2.4	2.4	2.4	2.4
12	0.5	0.5	0.5	0.5	0.5
13	0.0	0.0	0.0	0.0	0.0
14	1.6	1.6	1.6	1.6	1.6
15	0.8	0.8	0.8	0.8	0.8
16	0.4	0.4	0.4	0.4	0.4

TABLE 43
COMPARISON GOODS SPEND (£)

Catchment Zone	Silk Bridge Retail Park 2008 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)
1	0	0	0	0	0
2	0	0	0	0	0
3	0	0	0	0	0
4	397	454	634	779	868
5	336	364	429	523	579
6	0	0	0	0	0
7	261	281	330	392	428
8	572	635	765	933	1,217
9	5,027	6,042	8,105	9,836	12,680
10	208	229	266	339	392
11	3,050	3,726	5,926	7,340	8,988
12	518	573	704	878	1,089
13	0	0	0	0	0
14	1,731	1,880	2,249	2,720	3,307
15	1,715	1,920	2,367	2,905	3,563
16	1,082	1,220	1,516	1,874	2,309
Total	14,896	17,323	23,289	28,521	35,419

Source: Tables 3 & 32

TABLE 44
COMPARISON GOODS MARKET SHARE (%)

Catchment Zone	Broadway Retail Park, Cricklewood 2008 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)
1	0.0	0.0	0.0	0.0	0.0
2	0.1	0.1	0.1	0.1	0.1
3	0.1	0.1	0.1	0.1	0.1
4	0.2	0.2	0.2	0.2	0.2
5	0.2	0.2	0.2	0.2	0.2
6	0.2	0.2	0.2	0.2	0.2
7	0.3	0.3	0.3	0.3	0.3
8	0.0	0.0	0.0	0.0	0.0
9	0.1	0.1	0.1	0.1	0.1
10	1.0	1.0	1.0	1.0	1.0
11	2.1	2.1	2.1	2.1	2.1
12	0.1	0.1	0.1	0.1	0.1
13	0.0	0.0	0.0	0.0	0.0
14	0.3	0.3	0.3	0.3	0.3
15	1.7	1.7	1.7	1.7	1.7
16	0.5	0.5	0.5	0.5	0.5

TABLE 45
COMPARISON GOODS SPEND (£)

Catchment Zone	Broadway Retail Park, Cricklewood 2008 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)
1	0	0	0	0	0
2	103	113	136	166	203
3	147	159	189	226	275
4	152	173	242	297	331
5	184	200	235	287	318
6	322	351	412	492	566
7	222	240	282	334	365
8	0	0	0	0	0
9	127	153	205	249	321
10	1,208	1,327	1,543	1,969	2,278
11	2,698	3,295	5,241	6,493	7,949
12	81	90	110	138	171
13	0	0	0	0	0
14	359	390	466	564	686
15	3,887	4,352	5,365	6,587	8,077
16	1,303	1,469	1,825	2,256	2,779
Total	10,793	12,312	16,252	20,057	24,319

Source: Tables 3 & 32

TABLE 46
COMPARISON GOODS MARKET SHARE (%)

Catchment Zone	Homebase North Finchley 2008 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)
1	0.3	0.3	0.3	0.3	0.3
2	0.4	0.4	0.4	0.4	0.4
3	1.8	1.8	1.8	1.8	1.8
4	1.7	1.7	1.7	1.7	1.7
5	3.1	3.1	3.1	3.1	3.1
6	1.6	1.6	1.6	1.6	1.6
7	2.0	2.0	2.0	2.0	2.0
8	0.0	0.0	0.0	0.0	0.0
9	0.0	0.0	0.0	0.0	0.0
10	0.2	0.2	0.2	0.2	0.2
11	0.2	0.2	0.2	0.2	0.2
12	0.1	0.1	0.1	0.1	0.1
13	0.2	0.2	0.2	0.2	0.2
14	0.0	0.0	0.0	0.0	0.0
15	0.4	0.4	0.4	0.4	0.4
16	1.1	1.1	1.1	1.1	1.1

TABLE 47
COMPARISON GOODS SPEND (£)

Catchment Zone	Homebase North Finchley 2008 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)
1	320	351	435	524	633
2	499	550	660	803	986
3	3,276	3,553	4,232	5,054	6,140
4	1,315	1,502	2,097	2,577	2,871
5	2,695	2,916	3,439	4,198	4,642
6	2,063	2,246	2,635	3,150	3,623
7	1,423	1,537	1,803	2,139	2,339
8	0	0	0	0	0
9	0	0	0	0	0
10	274	301	350	447	517
11	267	326	519	643	787
12	81	90	110	138	171
13	199	219	265	323	394
14	0	0	0	0	0
15	811	908	1,119	1,374	1,685
16	2,932	3,305	4,106	5,077	6,253
Total	16,154	17,803	21,770	26,446	31,040

Source: Tables 3 & 32

OUT OF CENTRE

TABLE 48
COMPARISON GOODS MARKET SHARE (%)

Catchment Zone	B&Q Whetstone 2008 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)
1	3.9	3.9	3.9	3.9	3.9
2	3.7	3.7	3.7	3.7	3.7
3	1.9	1.9	1.9	1.9	1.9
4	1.5	1.5	1.5	1.5	1.5
5	1.0	1.0	1.0	1.0	1.0
6	0.7	0.7	0.7	0.7	0.7
7	0.3	0.3	0.3	0.3	0.3
8	0.1	0.1	0.1	0.1	0.1
9	0.0	0.0	0.0	0.0	0.0
10	0.0	0.0	0.0	0.0	0.0
11	0.0	0.0	0.0	0.0	0.0
12	0.2	0.2	0.2	0.2	0.2
13	1.0	1.0	1.0	1.0	1.0
14	0.0	0.0	0.0	0.0	0.0
15	0.1	0.1	0.1	0.1	0.1
16	0.4	0.4	0.4	0.4	0.4

TABLE 49
COMPARISON GOODS SPEND (£)

Catchment Zone	B&Q Whetstone 2008 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)
1	3,601	3,956	4,901	5,901	7,126
2	4,234	4,669	5,606	6,817	8,371
3	3,423	3,712	4,421	5,280	6,414
4	1,158	1,322	1,846	2,269	2,528
5	839	908	1,070	1,307	1,445
6	861	938	1,100	1,316	1,513
7	222	240	282	334	365
8	99	110	133	162	211
9	0	0	0	0	0
10	0	0	0	0	0
11	0	0	0	0	0
12	162	179	221	275	341
13	986	1,085	1,315	1,603	1,956
14	0	0	0	0	0
15	199	223	275	337	413
16	977	1,102	1,369	1,692	2,084
Total	16,761	18,444	22,538	27,293	32,769

Source: Tables 3 & 32

TABLE 50
COMPARISON GOODS MARKET SHARE (%)

Catchment Zone	Homebase Colindale 2008 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)
1	0.0	0.0	0.0	0.0	0.0
2	0.0	0.0	0.0	0.0	0.0
3	0.0	0.0	0.0	0.0	0.0
4	0.3	0.3	0.3	0.3	0.3
5	0.1	0.1	0.1	0.1	0.1
6	0.0	0.0	0.0	0.0	0.0
7	0.2	0.2	0.2	0.2	0.2
8	0.6	0.6	0.6	0.6	0.6
9	0.6	0.6	0.6	0.6	0.6
10	0.7	0.7	0.7	0.7	0.7
11	2.0	2.0	2.0	2.0	2.0
12	0.0	0.0	0.0	0.0	0.0
13	0.0	0.0	0.0	0.0	0.0
14	0.2	0.2	0.2	0.2	0.2
15	0.3	0.3	0.3	0.3	0.3
16	0.1	0.1	0.1	0.1	0.1

TABLE 51
COMPARISON GOODS SPEND (£)

Catchment Zone	Homebase Colindale 2008 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)
1	0	0	0	0	0
2	0	0	0	0	0
3	0	0	0	0	0
4	227	260	362	445	496
5	83	90	106	130	143
6	0	0	0	0	0
7	138	149	175	208	227
8	703	780	941	1,147	1,496
9	880	1,058	1,419	1,722	2,220
10	934	1,026	1,193	1,522	1,761
11	2,610	3,188	5,071	6,282	7,691
12	0	0	0	0	0
13	0	0	0	0	0
14	261	284	339	410	499
15	597	668	824	1,011	1,240
16	268	302	376	465	572
Total	6,702	7,806	10,806	13,342	16,346

Source: Tables 3 & 32

TABLE 52
BARNET CENTRES COMPARISON GOODS FLOORSPACE

	Net Floorspace (sqm)
REGIONAL SHOPPING CENTRE	
Brent Cross	62,646
MAJOR CENTRE	
Edgware	13,200
DISTRICT CENTRES	
Chipping Barnet	9,601
North Finchely	6,819
Temple Fortune	4,641
Church End Finchley	4,557
Cricklewood*	12,084
Golders Green	4,271
Burnt Oak*	7,089
Mill Hill	3,439
East Finchley	3,062
Brent Street	2,912
Whetstone	2,327
Hendon Central	1,762
New Barnet	1,842
Colindale*	2,807
DISTRICT CENTRES SUB TOTAL	**67,209**
ALL CENTRES SUB TOTAL	**143,055**

Source: LB Barnet/Experian Goad

TABLE 53
BRENT CROSS SOUTH RETAIL PARK

	Net Floorspace (sqm)	Sales Density (£ per sqm)	Turnover (£000s)
Brent Cross Retail Park			
Borders	966	3,933	3,800
Next	1,367	6,248	8,544
TK Maxx	795	2,896	2,303
Sports World	810	2,277	1,845
DFS	1,598	6,020	9,619
Lakeland	483	2,046	988
Burton / Dorothy Perkins	491	2,491	1,222
The Carphone Warehouse / Game / Jessops	409	14,570	5,956
Mamas & Papas	431	2,846	1,227
Sub Total	**7,350**		**35,503**

Market Shares Added to Brent Cross Shopping Centre

TABLE 54
RETAIL WAREHOUSE FLOORSPACE

	Net Floorspace (sqm)	Sales Density (£ per sqm)	Turnover (£000s)
Friern Bridge Retail Park			
Carpetright / Sleepright	944	1,341	1,266
Currys	1,969	7,234	14,247
Harveys / Benson for Beds / Rosebys	1,137	1,719	1,955
Halfords	773	2,452	1,895
Furniture Village	1,910	3,200	6,112
MFI / Paul Simon	1,925	2,488	4,789
Alllied Carpets	959	1,265	1,213
Sports World	1,152	2,277	2,623
JJB Sports	1,137	2,277	2,589
Comet	1,546	7,677	11,868
Sub Total			**48,557**
Staples Corner Retail Park			
Carpetright	609	1,341	817
ScS	795	2,251	1,790
PC World	2,750	7,412	20,382
Currys	2,794	7,234	20,215
Laura Ashley	691	3,465	2,395
JJB Sports	624	2,277	1,422
The Carphone Warehouse	82	5,000	409
Dreams	595	1,719	1,022
Sub Total			**48,451**
Pentavia Retail Park			
Argos	3,720	4,000	14,879
Comet	980	7,677	7,524
Homebase	2,651	1,429	3,788
Sub Total			**26,191**
Silk Bridge Retail Park			
Allied Carpets	746	1,265	944
Halfords	825	2,452	2,023
Comet	1,620	7,677	12,439
Sub Total			**15,405**
Broadway Retail Park			
B&Q Warehouse	4,693	1,986	9,321
In Store / Tile Warehouse	576	7,019	4,040
Sub Total			**13,361**
Stand-alone Units			
Toys R Us, Tilling Road, Brent Cross	3,538	2,618	
Homebase, North Finchley	2,690	1,429	3,845
Homebase, Rookery Way, Edgware Road	2,642	1,429	3,775
B&Q, High Road, Whetstone	2,995	1,986	5,948
Carpet Right, High Road, Whetstone	884	1,341	
			13,568
TOTAL	**50,953**	**3,249**	**165,533**

Source: Trevor Wood/LB Barnet/Experian Goad

LB BARNET
BOROUGH-WIDE TOWN CENTRES STUDY 2008

TABLE 55
RETAIL COMPARISON COMMITMENTS

	Net Floorspace (sqm)	Co Average Sales (£ per sq m net)	Average Turnover 2008 (£000s)	Average Turnover 2011 (£000s)	Average Turnover 2016 (£000s)	Average Turnover 2021 (£000s)	Average Turnover 2026 (£000s)
Sainsburys, 612-614 Finchley Road, NW11 7RX, (Golders Green)	1,625	3,000	4,876	5,437	6,063	6,762	7,540
Former Courts Unit, Staples Corner Retail Park, Edgware Road	1,607	3,000	4,820	5,375	5,993	6,684	7,453
Extention to Tesco, Colney Hatch/North Circular Road	1,195	3,000	3,585	3,998	4,458	4,972	5,544
Unit 1C Brent Cross Shopping Centre	641	3,000	1,922	2,143	2,390	2,665	2,972
TOTAL	**5,067**		**15,202**	**16,952**	**18,905**	**21,082**	**23,509**

Source: LB Barnet

LB BARNET
BOROUGH-WIDE TOWN CENTRES STUDY 2008

TABLE 56
RETAIL PIPELINE - COMPARISON GOODS

	Net Floorspace (sqm)	Co Average Sales (£ per sqm net)	Total Turnover 2008 (£000s)	Total Turnover 2011 (£000s)	Total Turnover 2016 (£000s)	Total Turnover 2021 (£000s)	Total Turnover 2026 (£000s)
BXC application	28,590	6,000	171,540	191,294	229,401	275,099	329,901
New Barnet Asda	1,739	6,000	10,434	11,636	13,953	16,733	20,066
New Barnet Tesco	1,254	6,000	7,524	8,390	10,062	12,066	14,470
Brent Cross, Tesco Extra plus unit shops (Replacement Flsp Only)	2,214	6,000	13,284	14,814	17,765	21,304	25,547
TOTAL	**28,590**		**202,782**	**226,134**	**271,181**	**325,202**	**389,984**

Source: LB Barnet

LB BARNET
BOROUGH-WIDE TOWN CENTRES STUDY 2008

CAPACITY PROJECTIONS: COMPARISON GOODS

TABLE 57
FUTURE SHOP GLOBAL FLOORSPACE CAPACITY FOR LB BARNET

GROWTH IN SALES PER SQ M	1.5	%pa '08-'26			
	COMPARISON GOODS				
	2008	2011	2016	2021	2026
Total Comparison Goods Turnover in LB Barnet (£000)	914,916	1,026,961	1,300,365	1,589,421	1,919,018
Market Share from Survey Area	43.9	44.1	44.6	44.6	44.4
Survey Area Residents Spending	2,082,307	2,329,161	2,914,240	3,563,821	4,321,837
Inflow from beyond survey area (£000)	159,877	179,193	226,169	276,778	333,133
Total Town Centre Comparison Turnover (£000)	1,074,794	1,206,154	1,526,534	1,866,200	2,252,151
Existing Shop Floorspace (sqm net)	201,358	201,358	201,358	201,358	201,358
Sales per sqm net £	5,338	5,582	6,013	6,478	6,978
Sales from Existing Floorspace (£000)	1,074,794	1,123,889	1,210,747	1,304,319	1,405,122
Sales from Committed Floorspace (£000)	0	16,952	18,905	21,082	23,509
Residual Spending to Support new shops (£000)	0	65,313	296,882	540,799	823,520
Sales per sqm net in new shops (£) Based on large store format	5,500	5,751	6,196	6,675	7,190
Capacity for new floorspace (sqm net)	0	11,356	47,917	81,024	114,531

LB BARNET
BOROUGH-WIDE TOWN CENTRES STUDY 2008

CAPACITY PROJECTIONS: COMPARISON GOODS

TABLE 58
FUTURE SHOP FLOORSPACE CAPACITY NORTH SUB AREA

GROWTH IN SALES PER SQ M		1.5	%pa '08-'26		
	COMPARISON GOODS				
	2008	2011	2016	2021	2026
Total Comparison Goods Turnover in LB Barnet (£000)	27,478	30,301	37,242	45,044	54,435
Market Share from Survey Area	1.3	1.3	1.3	1.3	1.3
Survey Area Residents Spending	2,082,307	2,329,161	2,914,240	3,563,821	4,321,837
Inflow from beyond survey area (£000)	0	0	0	0	0
Total Town Centre Comparison Turnover (£000)	27,478	30,301	37,242	45,044	54,435
Existing Shop Floorspace (sqm net)	11,443	11,443	11,443	11,443	11,443
Sales per sqm net £	2,401	2,511	2,705	2,914	3,139
Sales from Existing Floorspace (£000)	27,478	28,733	30,954	33,346	35,923
Sales from Committed Floorspace (£000)	0	0	0	0	0
Residual Spending to Support new shops (£000)	0	1,568	6,288	11,698	18,512
Sales per sqm net in new shops (£) Based on large store format	5,500	5,751	6,196	6,675	7,190
Capacity for new floorspace (sqm net)	0	273	1,015	1,753	2,575

LB BARNET
BOROUGH-WIDE TOWN CENTRES STUDY 2008

CAPACITY PROJECTIONS: COMPARISON GOODS

TABLE 59
FUTURE SHOP FLOORSPACE CAPACITY WEST SUB AREA

GROWTH IN SALES PER SQ M		1.5	%pa '08-'26		
	COMPARISON GOODS				
	2008	2011	2016	2021	2026
Total Comparison Goods Turnover in LB Barnet (£000)	109,743	125,954	164,132	200,696	250,863
Market Share from Survey Area	5.3	5.4	5.6	5.6	5.8
Survey Area Residents Spending	2,082,307	2,329,161	2,914,240	3,563,821	4,321,837
Inflow from beyond survey area (£000)	0	0	0	0	0
Total Town Centre Comparison Turnover (£000)	109,743	125,954	164,132	200,696	250,863
Existing Shop Floorspace (sqm net)	68,467	68,467	68,467	68,467	68,467
Sales per sqm net £	1,603	1,676	1,806	1,945	2,095
Sales from Existing Floorspace (£000)	109,743	114,756	123,625	133,179	143,472
Sales from Committed Floorspace (£000)	0	0	0	0	0
Residual Spending to Support new shops (£000)	0	11,198	40,507	67,517	107,391
Sales per sqm net in new shops (£) Based on large store format	5,500	5,751	6,196	6,675	7,190
Capacity for new floorspace (sqm net)	0	1,947	6,538	10,116	14,935

LB BARNET
BOROUGH-WIDE TOWN CENTRES STUDY 2008

CAPACITY PROJECTIONS: COMPARISON GOODS

TABLE 60
FUTURE SHOP FLOORSPACE CAPACITY FOR EAST SUB AREA

GROWTH IN SALES PER SQ M		1.5	%pa '08-'26		
	COMPARISON GOODS				
	2008	2011	2016	2021	2026
Total Comparison Goods Turnover in LB Barnet (£000)	159,970	175,888	213,575	258,466	307,247
Market Share from Survey Area	7.7	7.6	7.3	7.3	7.1
Survey Area Residents Spending	2,082,307	2,329,161	2,914,240	3,563,821	4,321,837
Inflow to Friern Bridge Retail Park (25%) from beyond survey area (£000)	12,588	13,803	16,607	20,036	23,995
Total Town Centre Comparison Turnover (£000)	172,559	189,691	230,182	278,502	331,242
Existing Shop Floorspace (sqm net)	67,495	67,495	67,495	67,495	67,495
Sales per sqm net £	2,557	2,673	2,880	3,103	3,342
Sales from Existing Floorspace (£000)	172,559	180,441	194,386	209,409	225,593
Sales from Committed Floorspace (£000)	0	3,998	4,458	4,972	5,544
Residual Spending to Support new shops (£000)	0	5,252	31,338	64,121	100,105
Sales per sqm net in new shops (£) Based on large store format	5,500	5,751	6,196	6,675	7,190
Capacity for new floorspace (sqm net)	0	913	5,058	9,607	13,922

LB BARNET
BOROUGH-WIDE TOWN CENTRES STUDY 2008

CAPACITY PROJECTIONS: COMPARISON GOODS

TABLE 61
FUTURE SHOP FLOORSPACE CAPACITY FOR SOUTH WEST

GROWTH IN SALES PER SQ M	1.5	%pa '08-'26			
	COMPARISON GOODS				
	2008	2011	2016	2021	2026
Total Comparison Goods Turnover in LB Barnet (£000)	607,146	683,133	871,382	1,067,856	1,286,315
Market Share from Survey Area	29.2	29.3	29.9	30.0	29.8
Survey Area Residents Spending	2,082,307	2,329,161	2,914,240	3,563,821	4,321,837
Inflow Brent Cross and Staples Corner Retail Park from beyond survey area (£000)	147,289	165,390	209,563	256,743	309,138
Total Town Centre Comparison Turnover (£000)	754,435	848,523	1,080,945	1,324,599	1,595,453
Existing Shop Floorspace (sqm net)	177,133	177,133	177,133	177,133	177,133
Sales per sqm net £	4,259	4,454	4,798	5,169	5,568
Sales from Existing Floorspace (£000)	754,435	788,897	849,866	915,547	986,304
Sales from Committed Floorspace (£000)	0	7,517	8,383	9,348	10,425
Residual Spending to Support new shops (£000)	-0	52,109	222,696	399,703	598,724
Sales per sqm net in new shops (£) Based on large store format	5,500	5,751	6,196	6,675	7,190
Capacity for new floorspace (sqm net)	0	9,060	35,944	59,885	83,267

LB BARNET
BOROUGH-WIDE TOWN CENTRES STUDY 2008

CAPACITY PROJECTIONS: COMPARISON GOODS

TABLE 62
FUTURE SHOP FLOORSPACE CAPACITY FOR SOUTH EAST

GROWTH IN SALES PER SQ M **1.5** **%pa '08-'26**

	COMPARISON GOODS				
	2008	2011	2016	2021	2026
Total Comparison Goods Turnover in LB Barnet (£000)	10,578	11,685	14,034	17,359	20,159
Market Share from Survey Area	0.5	0.5	0.5	0.5	0.5
Survey Area Residents Spending	2,082,307	2,329,161	2,914,240	3,563,821	4,321,837
Inflow from beyond survey area (£000)	0	0	0	0	0
Total Town Centre Comparison Turnover (£000)	10,578	11,685	14,034	17,359	20,159
Existing Shop Floorspace (sqm net)	11,824	11,824	11,824	11,824	11,824
Sales per sqm net £	895	936	1,008	1,086	1,170
Sales from Existing Floorspace (£000)	10,578	11,062	11,917	12,837	13,830
Sales from Committed Floorspace (£000)	0	5,437	6,063	6,762	7,540
Residual Spending to Support new shops (£000)	0	-4,814	-3,946	-2,240	-1,211
Sales per sqm net in new shops (£) Based on large store format	5,500	5,751	6,196	6,675	7,190
Capacity for new floorspace (sqm net)	0	-837	-637	-336	-168

LB BARNET
BOROUGH-WIDE TOWN CENTRES STUDY 2008

CAPACITY PROJECTIONS: COMPARISON GOODS

TABLE 63
FUTURE SHOP GLOBAL FLOORSPACE CAPACITY FOR LB BARNET - PIPELINE

GROWTH IN SALES PER SQ M 1.5 %pa '08-'26

	COMPARISON GOODS				
	2008	2011	2016	2021	2026
Total Comparison Goods Turnover in LB Barnet (£000)	914,916	1,026,961	1,300,365	1,589,421	1,919,018
Market Share from Survey Area	43.9	44.1	44.6	44.6	44.4
Survey Area Residents Spending	2,082,307	2,329,161	2,914,240	3,563,821	4,321,837
Inflow to Brent Cross (20%) from beyond survey area (£000)	159,877	179,193	226,169	276,778	333,133
Total Town Centre Comparison Turnover (£000)	1,074,794	1,206,154	1,526,534	1,866,200	2,252,151
Existing Shop Floorspace (sqm net)	201,358	201,358	201,358	201,358	201,358
Sales per sqm net £	5,338	5,582	6,013	6,478	6,978
Sales from Existing Floorspace (£000)	1,074,794	1,123,889	1,210,747	1,304,319	1,405,122
Sales from Committed Floorspace (£000)	0	36,978	60,685	346,284	413,493
Residual Spending to Support new shops (£000)	0	45,287	255,102	215,597	433,536
Sales per sqm net in new shops (£) Based on large store format	5,500	5,751	6,196	6,675	7,190
Capacity for new floorspace (sqm net)	0	7,874	41,174	32,301	60,294

LB BARNET
BOROUGH-WIDE TOWN CENTRES STUDY 2008

CAPACITY PROJECTIONS: COMPARISON GOODS

TABLE 64
FUTURE SHOP FLOORSPACE CAPACITY NORTH SUB AREA - PIPELINE

GROWTH IN SALES PER SQ M	1.5 %pa '08-'26				
	COMPARISON GOODS				
	2008	2011	2016	2021	2026
Total Comparison Goods Turnover in LB Barnet (£000)	27,478	30,301	37,242	45,044	54,435
Market Share from Survey Area	1.3	1.3	1.3	1.3	1.3
Survey Area Residents Spending	2,082,307	2,329,161	2,914,240	3,563,821	4,321,837
Inflow from beyond survey area (£000)	0	0	0	0	0
Total Town Centre Comparison Turnover (£000)	27,478	30,301	37,242	45,044	54,435
Existing Shop Floorspace (sqm net)	11,443	11,443	11,443	11,443	11,443
Sales per sqm net £	2,401	2,511	2,705	2,914	3,139
Sales from Existing Floorspace (£000)	27,478	28,733	30,954	33,346	35,923
Sales from Committed Floorspace (£000)	0	20,026	24,015	28,799	34,536
Residual Spending to Support new shops (£000)	0	-18,458	-17,727	-17,101	-16,024
Sales per sqm net in new shops (£) Based on large store format	5,500	5,751	6,196	6,675	7,190
Capacity for new floorspace (sqm net)	0	-3,209	-2,861	-2,562	-2,229

LB BARNET
BOROUGH-WIDE TOWN CENTRES STUDY 2008

CAPACITY PROJECTIONS: COMPARISON GOODS

TABLE 65
FUTURE SHOP FLOORSPACE CAPACITY WEST SUB AREA - PIPELINE

GROWTH IN SALES PER SQ M	1.5	%pa '08-'26			
	COMPARISON GOODS				
	2008	2011	2016	2021	2026
Total Comparison Goods Turnover in LB Barnet (£000)	109,743	125,954	164,132	200,696	250,863
Market Share from Survey Area	5.3	5.4	5.6	5.6	5.8
Survey Area Residents Spending	2,082,307	2,329,161	2,914,240	3,563,821	4,321,837
Inflow from beyond survey area (£000)	0	0	0	0	0
Total Town Centre Comparison Turnover (£000)	109,743	125,954	164,132	200,696	250,863
Existing Shop Floorspace (sqm net)	68,467	68,467	68,467	68,467	68,467
Sales per sqm net £	1,603	1,676	1,806	1,945	2,095
Sales from Existing Floorspace (£000)	109,743	114,756	123,625	133,179	143,472
Sales from Committed Floorspace (£000)	0	0	0	0	0
Residual Spending to Support new shops (£000)	0	11,198	40,507	67,517	107,391
Sales per sqm net in new shops (£) Based on large store format	5,500	5,751	6,196	6,675	7,190
Capacity for new floorspace (sqm net)	0	1,947	6,538	10,116	14,935

LB BARNET
BOROUGH-WIDE TOWN CENTRES STUDY 2008

CAPACITY PROJECTIONS: COMPARISON GOODS

TABLE 66
FUTURE SHOP FLOORSPACE CAPACITY FOR EAST SUB AREA - PIPELINE

GROWTH IN SALES PER SQ M		1.5	%pa '08-'26		
	COMPARISON GOODS				
	2008	2011	2016	2021	2026
Total Comparison Goods Turnover in LB Barnet (£000)	159,970	175,888	213,575	258,466	307,247
Market Share from Survey Area	7.7	7.6	7.3	7.3	7.1
Survey Area Residents Spending	2,082,307	2,329,161	2,914,240	3,563,821	4,321,837
Inflow to Friern Bridge Retail Park (25%) from beyond survey area (£000)	12,588	13,803	16,607	20,036	23,995
Total Town Centre Comparison Turnover (£000)	172,559	189,691	230,182	278,502	331,242
Existing Shop Floorspace (sqm net)	67,495	67,495	67,495	67,495	67,495
Sales per sqm net £	2,557	2,673	2,880	3,103	3,342
Sales from Existing Floorspace (£000)	172,559	180,441	194,386	209,409	225,593
Sales from Committed Floorspace (£000)	0	3,998	4,458	4,972	5,544
Residual Spending to Support new shops (£000)	0	5,252	31,338	64,121	100,105
Sales per sqm net in new shops (£) Based on large store format	5,500	5,751	6,196	6,675	7,190
Capacity for new floorspace (sqm net)	0	913	5,058	9,607	13,922

LB BARNET
BOROUGH-WIDE TOWN CENTRES STUDY 2008

CAPACITY PROJECTIONS: COMPARISON GOODS

TABLE 67
FUTURE SHOP FLOORSPACE CAPACITY FOR SOUTH WEST - PIPELINE

GROWTH IN SALES PER SQ M 1.5 %pa '08-'26

	COMPARISON GOODS				
	2008	2011	2016	2021	2026
Total Comparison Goods Turnover in LB Barnet (£000)	607,146	683,133	871,382	1,067,856	1,286,315
Market Share from Survey Area	29.2	29.3	29.9	30.0	29.8
Survey Area Residents Spending	2,082,307	2,329,161	2,914,240	3,563,821	4,321,837
Inflow Brent Cross and Staples Corner Retail Park from beyond survey area (£000)	147,289	165,390	209,563	256,743	309,138
Total Town Centre Comparison Turnover (£000)	754,435	848,523	1,080,945	1,324,599	1,595,453
Existing Shop Floorspace (sqm net)	177,133	177,133	177,133	177,133	177,133
Sales per sqm net £	4,259	4,454	4,798	5,169	5,568
Sales from Existing Floorspace (£000)	754,435	788,897	849,866	915,547	986,304
Sales from Committed Floorspace (£000)	0	7,517	26,148	305,751	365,873
Residual Spending to Support new shops (£000)	-0	52,109	204,931	103,301	243,276
Sales per sqm net in new shops (£) Based on large store format	5,500	5,751	6,196	6,675	7,190
Capacity for new floorspace (sqm net)	0	9,060	33,076	15,477	33,834