London Borough of Barnet

Town Centres Floorspace Needs Assessment
Volume 2: Appendices to Main Report

Peter Brett Associates
December 2017

33 Bowling Green Lane, Clerkenwell, London EC1R 0BJ
T: +44 (0)20 3824 6600   E: london@peterbrett.com

Project Ref 40493

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

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

THIS REPORT IS FORMATTED FOR DOUBLE-SIDED PRINTING

APPENDICES (to be read with Volume 1 Main Report)

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

APPENDIX A LOCAL POLICY SUMMARY

A.1 Development plan policy

Barnet's Local Plan Core Strategy (September 2012)

London Borough of Barnet (LBB) adopted the Local Plan Core Strategy (CS) in September 2012. The CS indicates that the Borough has the most district town centres in London, with a network of 30 town centres, in addition to Brent Cross which his currently identified as a 'major shopping centre' (discussed further below). The CS states that nearly every resident within Barnet lives within half a mile of a town centre.

Within the CS, Barnet is identified as having a 'complex pattern' of town centres with a hierarchy comprising of Edgware, a major centre, along with 14 district centres and 15 local/ neighbourhood centres. In addition, the CS identifies Brent Cross as a future metropolitan centre, as there are development proposals to regenerate the Brent Cross – Cricklewood area to provide 55,000 sqm (gross) comparison retail floorspace. Barnet's 'network of town centres' identified in Table 4 of the CS is reproduced in the table below.

Barnet's network of town centres

Town centre	Description
Metropolitan Centres	Located mainly in Outer London; these centres serve wide sub-regional catchment areas and offer a high level and range of comparison shopping. They typically have over 100,000 sqm of retail floorspace, including multiple retailers and department stores. Metropolitan centres also have significant employment, service and leisure functions. The redevelopment of the **Brent Cross - Cricklewood** area will create a new town centre which will have a Metropolitan role.
Major Centres	These are important shopping and service centres, often with a borough-wide catchment. Their attractiveness for retailing is derived from a mix of both comparison and convenience shopping. Some major centres, which have developed sizeable catchment areas, also have some leisure and entertainment functions. Major centres normally have over 50,000 sqm of retail floorspace. **Edgware** has a wide variety of retail provision serving a major centre.
District Centres	These centres have traditionally provided convenience goods and services for more local communities and are distributed across Barnet. Some district centres have developed specialist shopping functions, often because of their lower rents. The CS states that developing the capacity of district centres for convenience shopping is critical to ensure access to goods and services at the local level. Barnet's district centres are linear in nature, and may need to be consolidated to make more efficient use of land and transport capacity. The CS identifies the following District centres: **Brent Street, Burnt Oak (partly within LB Brent and LB Harrow), Chipping Barnet, Colindale - The Hyde (partly within LB Brent) Cricklewood (partly within LB Brent), East Finchley, Finchley - Church End, Golders Green, Hendon, Mill Hill, New Barnet, North Finchley, Temple Fortune and Whetstone.**
Neighbourhood/ Local Centres	These centres provide services for local communities and are of cumulative strategic significance. Local centres have a comparable

Town centre	Description
	service-orientated offer of shops. Neighbourhood centres occupy the base of the retail hierarchy and are largely service orientated with cafes, takeaways, health and beauty services, newsagents and small convenience stores. Local centres which are specifically identified within the CS include: **Apex Corner, Childs Hill, Colney Hatch Lane, Deansbrook Road, East Barnet Village, Friern Barnet, Golders Green Road, Grahame Park, Great North Road, Hampden Square, Hale Lane** **Holders Hill Circus, Market Place, New Southgate, West Hendon**

The CS summarises the findings of the ‘Creating Vibrant Suburban Town Centres in Barnet’ report which was published in December 2007 as well as the ‘Town Centre Floorspace Needs Assessment’ (TCFNA) which was conducted in 2009 and the subsequent update undertaken in 2010. The CS also states that the Council produced the ‘Suburban Town Centre Strategy’ in April 2008, which identified Chipping Barnet, North Finchley, Edgware and Finchley Church End as centres where more detailed planning frameworks will support the potential for future growth and manage anticipated change.

The CS recognises that the continued vibrancy and diversity of services offered in the Borough’s centres depends on access by all who want to use them and that a balance must be found that encourages people to use local businesses in preference to out-of-town retail developments. The CS commits to ensuring that planning is focussed on supporting vibrant town centres though:

- Redefining the role of each town centre based on the function which will provide the most potential (e.g. thereby allowing changes of use to support this redefined role);
- The creation of larger shop units to meet demand from major retailers;
- The granting of temporary permissions to reduce, in the short term, the number of vacant properties; and
- Developing a planned strategy for housing intensification, and social infrastructure improvement for the edges of town centres, where applicable.

CS Policy CS6 aims to promote Barnet’s town centres, by realising development opportunities for the town centres of Edgware, North Finchley, Finchley Church End and Chipping Barnet. The policy aims to provide for an additional 16,800 sqm (net) of comparison goods floorspace and 2,200 sqm (net) of convenience goods floorspace across Barnet by 2021–2026. The growth of comparison goods floorspace growth is earmarked for Edgware, North Finchley and Chipping Barnet, while the majority of the convenience capacity arises in North Finchley and Edgware. The CS does not plan further significant convenience goods provision before 2026.

Policy CS6 goes onto promote the efficient use of land and buildings in all town centres, encouraging a mix of compatible uses and takes a planned approach to manage development opportunities in Golders Green, Whetstone and New Barnet, smaller District Centres at Burnt Oak, Colindale – the Hyde and Cricklewood, as well as promoting further opportunities for town centre enhancement at smaller centres that attract private sector investment or have been highlighted for priority action. The policy also seeks to protect and enhance more 'local' neighbourhood centres and parades of shops whilst promoting Brent Cross/Cricklewood as a new metropolitan town centre and an Outer London Development Centre.

Barnet's Local Plan Development Management Polices (September 2012)

Section 12 of the Local Plan Development Management Polices (DMP) relates to development principles of Barnet's town centres. The DMP establishes appropriate town centre uses expected to be located within the town centre boundary, consistent with national and London Plan guidance and states that all out of town retail development will be required to consider the sequential approach as set out within the NPPF. The DMP states that in Barnet, an edge of centre site is locally defined as being within 150 metres of the town centre boundary and that extensions which exceed 200 sqm gross will also need to comply with the sequential approach.

The DMP states that protecting retail vitality and viability in the frontages is the priority for Barnet's town centres to retain their main retail function and that preventing an over concentration of similar non-Class A1 uses is important to maintaining the vitality and viability of a town centre.

The DMP clarifies that Neighbourhood and Local Centres are both recognised as local centres and both occupy the same position in the London Plan town centre hierarchy. Protecting retail uses (Class A1) from change in local centres is identified as a priority and the loss of Class A1 will generally be resisted. The retail frontages in the following local centres are specifically identified within the DMP: Friern Barnet, Great North Road, East Barnet Village, Colney Hatch Lane, Market Place, Apex Corner, Childs Hill, Hale Lane, West Hendon, Deansbrook Road, Golders Green Road, New Southgate, Hampden Square, Grahame Park and Holders Hill Circus.

Policy DM11 establishes the Council's expectations for a suitable mix of appropriate uses as part of development within the town centres to support their continued vitality and viability. The policy states that significant new retail and other appropriate town centre uses outside of town centres or any expansion of existing out of centre sites will be strongly resisted unless they can meet the sequential approach or are identified in an adopted Area Action Plan. Policy DM11 goes on to set out development principles for primary and secondary frontages and mixed use development.

Policy DM12 states that the Council will protect all retail uses (Class A1) in the existing local centres, parades and isolated shops unless it can be demonstrated that:

i there will be no significant reduction of shopping facilities as a result; and

ii that alternative shopping facilities that are similarly accessible by walking, cycling or public transport exist to meet the needs of the area; and

iii the proposed use is within Class A2, A3, A4, A5 or meets an identified local need; and iv there is no demand for continued Class A1 use, and that the site has been marketed effectively for such use.

Appendix 4 of the DMP identifies primary and secondary shopping frontages, whilst Appendix 5 provides town centre maps showing the extent of primary and secondary shopping frontages. Appendix 6 identifies retail frontages in identified local centres.

Barnet Unitary Development Plan (May 2006) – Saved Policies on Brent Cross Cricklewood

The Barnet Unitary Development Plan (UDP) was adopted in May 2006. The Core Strategy and Development Management Polices Local Plan has replaced most of the policies in the UDP except 13 saved policies for Brent Cross and Cricklewood.

In order to provide a policy framework to secure the future comprehensive redevelopment of Brent Cross and Cricklewood these 'saved' policies continue to operate until the Council considers that it is appropriate to replace them.

The UDP states that the regeneration of the area provides an opportunity for the transformation of Brent Cross Shopping Centre in a sustainable manner. Brent Cross comprises higher order comparison shopping that serves the needs of a large catchment area of North London and beyond. The council considers that a redeveloped Brent Cross will perform the function of a major town centre, spanning the A406 North Circular Road, sustaining a vibrant and viable evening economy and serving a catchment area wider than the Borough. The UDP states that a mix of uses will be encouraged in the new town centre; however, to maintain an attractive centre, the ground and first floors of the existing floorspace will remain primarily in retail use (Class A1).

Saved Policy C6 states the Council will support additional retail development at Brent Cross as part of a new town centre extending north and south of the North Circular Road (A406), subject to, amongst other factors, the scale of new comparison retail floorspace falling within the identified requirement of 55,000 sqm and floorspace within the primary frontage being for predominantly class A1 uses.

Colindale Area Action Plan (March 2010)

The Colindale Area Action Plan (AAP) was adopted in March 2010. The AAP sets out the framework for the future development of the Colindale area, which is identified as an area for significant strategic growth in the London Plan, with an indicative growth estimate of 2,000 new homes and 500 new jobs within the area.

The AAP states that the level of retail provision required in Colindale is dictated solely by the housing growth planned. This assumption is stated as being important as the approach has no impact on the vitality and viability of existing centres because it only caters for demand generated within the Colindale AAP area. The AAP states that the expenditure generated by all the future residents proposed in the AAP area will require circa 2,400 sqm net convenience goods sales floorspace, which equates to approximately 5,000 sqm gross (including some comparison goods floorspace).

Accordingly, Policy 7.4 states that a neighbourhood centre will be provided at Colindale Avenue, incorporating around 5,000 sq m gross of retail space, along with supporting health, leisure and community uses.

Mill Hill East Area Action Plan (January 2009)

The Mill Hill East AAP was adopted in January 2009. The AAP area is located within the existing neighbourhood of Mill Hill East and is focused around Inglis Barracks, a former operational base for the MoD, which is earmarked for 2,000 new homes, 500 jobs, as well as a new community hub to provide retail, commercial and community facilities.

Policy MHE4 states that residential development will be supported by the provision of on-site community facilities to meet the needs of new residents, whilst Policy MHE5 goes onto specify that retail development will be limited to small scale local convenience uses and retail services to serve the new residential population, with around 1,000 sqm of retail floorspace proposed as part of the local neighbourhood centre to complement and enhance existing retail provision at Holders Hill Circus and Langstone Way.

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

In December 2005, the Council together with the Mayor of London adopted the Development Framework as an SPG and as the Opportunity Area Development Framework for Brent Cross Cricklewood.

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

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

The Development Framework states that the new town centre will be developed on both sides of the A406 North Circular Road, along a new High Street. The Development Framework also states that ‘radical’ alterations to the existing Brent Cross Shopping Centre are required and that the regeneration of the area ‘must enable local centres to thrive’, notably the existing local shopping facilities at Cricklewood and West Hendon.

A.2 Supplementary policy

Town centre frameworks and strategies

LBB has produced a series of town centre frameworks and strategies which aim to enhance the vibrancy and viability of town centres and provide the basis for managing and promoting positive change in identified town centres. A summary of the issues and opportunities identified in each town centre for which a Town Centre Framework or Strategy has been prepared is provided below:

New Barnet (November 2010)

The Council adopted the New Barnet Town Centre Framework in November 2010. The framework identifies New Barnet as a relatively small centre (in terms of floorspace) but performs the role of a district centre because of its mix of uses and the presence of a large foodstore (Sainsbury's), which acts as the principal attractor to the centre, and dominates the retail offer. The centre has a limited (and lower value focused) comparison (non-food) goods offer, and restricted choice of convenience (food) goods retailers. There is limited representation by multiple retailers which is balanced by a varied independent offer.

The framework states that New Barnet performs poorly against key vitality and viability indicators and is generally regarded to be in decline, despite being located in a relatively affluent borough and area of North London. This trend of decline is due to a number of reasons, including the increasing attractiveness of competing centres, changing consumer trends, lack of investment in the centre, and lack of planning certainty. However, a number of significant development sites within, and on the edge of, the town centre have become available for redevelopment over the past few years which has sparked significant developer interest and offers an opportunity to transform the town centre.

The framework established the vision for New Barnet Town Centre to '*be a vital, viable, vibrant and sustainable centre that is recognised for its attractive, locally distinctive, safe, accessible, and welcoming environment; and strong range of quality shops, services and leisure offer that meet the day-to-day needs of the local community*'.

The framework identifies the following opportunity sites, which have the potential to contribute to the enhancement of the town:

- Site 1 – the former East Barnet Gas Works and surrounding land
- Site 2 – the former Optex site and surrounding land
- Site 3 – New Barnet Sainsbury's
- Site 4 – Site at corner of East Barnet Road and Victoria Road
- Site 5 – Fayers Building Yard
- Site 6 – Approach Road
- Site 7 – Station Approach towers
- Site 8 – Station Road towers

Finchley Church End (June 2012)

Finchley Church End Town Centre Strategy was adopted in June 2012. The strategy has four key objectives for the town centre to:

- encourage positive change, renewal and investment;
- foster enterprise;
- protect the suburban character of the area; and
- improve and enhance the quality of the public realm.

The framework identifies the following five priorities for change and investment in Finchley Church End:

i Ensure an accessible and integrated town centre and maximise the potential of the existing transport hub;

ii Enhance the character of the town centre;

iii Develop Finchley Church End's role as a sustainable, modern employment centre;

iv Protect, improve and strengthen the existing range of independent retail provision within the town centre; and

v Improve and green the public realm across the town centre.

The Finchley Church End Town Centre Strategy states the town's offer differs from surrounding centres and is dominated by a variety of small, independent convenience and specialist shops, with Tesco acting as the main retail anchor in the centre and a significant number of small, independent restaurants. The Strategy also states that independent shops and restaurants are key assets to the town and that the town is also is one of the six major office locations in Barnet with an important cluster of employment uses.

The strategy identifies the following opportunity sites, which are identified as having the opportunity to contribute to the enhancement of Finchley Church End:

- Site 1: 401-405 Nether Street
- Site 2: Winston House and 2-4 Dollis Park
- Site 3: Gateway House
- Site 4: 290-298 Nether Street
- Site 5: Finchley Central Station car park (and land to the east)
- Site 6: Station Road
- Site 7: Central House and 1-9 Ballards Lane
- Site 8: Tesco, Ballards Lane

The Strategy seeks to encourage an appropriate and balanced range of uses within Finchley Church End including a mixture of uses in the town centre. The strategy also seeks to reinforce to town's role as an important office location and encourages the provision of an appropriately located new hotel in the town.

The Spires Shopping Centre, Market Site and Territorial Army Centre, Chipping Barnet (July 2012)

The Spires Shopping Centre, Market Site and Territorial Army Centre, Chipping Barnet Planning Framework was adopted in July 2012. The Framework provides an outline of the vision for the planning of these three sites in or on the edge of Chipping Barnet Town Centre.

While Chipping Barnet is an established local town centre, the framework recognises that its character, appearance and facilities could be enhanced and the area could be more cohesive and interconnected. The framework states that The Spires, Barnet Market and the Territorial Army Centre represent a major development opportunity in the heart of the town centre which, through encouraging appropriate expansion, could enhance the vitality and viability of the area and act as a catalyst for the regeneration of the wider area.

To enable the delivery of the vision for this area a series of development principles are established within the framework, including:

- respect for and celebration of the town centre's history;
- enlargement of the retail offer with the re provision of the historic Barnet Market at its heart;
- provision of a high quality public realm and improved appearance of this part of the town centre; and
- improved transport facilities and services for all road users, including enhanced traffic, pedestrian, cycle and parking management measures.

In addition to the three key sites identified within the strategy there are a number of smaller sites in the surrounding area which, when combined with the wider sites, are identified as having the potential to provide enhanced development opportunities for the area. These include:

- the bandstand and pavement area to the rear of the Spires;
- the council car park on Stapylton Road;
- the landscaped area at the end of Chipping Close;
- the relocation of the bus layover area on Stapylton Road; and
- the community centre on Salisbury Road.

Chipping Barnet (June 2013)

Chipping Barnet Town Centre Strategy was adopted in June 2013. The Chipping Barnet Town Centre Strategy goes beyond the adopted Spires Planning Framework in focusing on the wider issues facing the town centre including:

- Improving the mix of land uses, primarily for shops (at ground floor level) but also residential, leisure, employment and community uses;
- Improving public transport and pedestrian and cycle connections;
- Improving quality of buildings and public spaces;
- promoting a safer and more secure environment;

- creating a clear role for the town centre in respect of planned growth elsewhere such as at Brent Cross.

The strategy identifies the following objectives for the Chipping Barnet town centre:

- To respect and celebrate the town centre's history and character;
- To improve the quality and range of the retail and leisure offer within the town centre with re-provision of the historic Barnet Market at its heart;
- To improve accessibility to the town centre and ensure better parking, cycling and traffic management;
- To provide a high quality public realm and improved appearance of the town centre;
- To enhance other opportunities unique to the town centre including promoting cultural, leisure and student activities.

The town centre strategy identified five opportunity areas – Barnet Market, TA Centre, the Spires Shopping Centre, Marie Foster and Land to the rear of 120 -204 High Street.

Edgware (June 2013)

Edgware Town Centre Framework was adopted by Council on June 2013. The Framework aims to guide future development proposals for key sites, manage changes in land use and secure necessary infrastructure improvements for the town centre to support existing businesses, address traffic issues and enhance the attractiveness of Edgware as a place to live, work and shop.

Edgware is identified as one of the most sustainable locations in Barnet with excellent public transport facilities at Edgware Tube station and Edgware Bus Station. The average weekly footfall through the centre is estimated to be around 130,000 with a broad catchment population of approximately 400,000.

The following objectives underpin the framework and set out how the vision for Edgware will be achieved:

- Protect and enhance Edgware's position as Barnet's Major town centre by identifying sites for retail growth and other town centre uses to enhance the range of shops on offer and secure a vibrant local economy;
- Secure transport and infrastructure improvements so that new retail development is fully integrated with Station Road;
- Reduce congestion on Station Road and encourage more people to access the town centre by walking and cycling along attractive routes and streets;
- Encourage the development of a distinct Northern Quarter around the Hale Lane and Edgware Bury Lane area with specialist shopping and services;
- Identify and deliver new public spaces and improved public realm including new tree planting and improved environment and public space outside Edgware Tube Station;

- Provide an attractive and safe environment, encompassing the highest quality urban design, architecture and open spaces.

The framework identifies that the biggest development opportunity in Edgware lies around the Broadwalk Shopping Centre which currently has approximately 18,500 sqm of floorspace shared between 43 individual retailers and benefits from 1,100 car parking spaces. Other opportunities exist to redevelop derelict land around the Forumside area and land around Premier House. These sites are identified as having the potential to deliver retail and other town centre uses to contribute to the vitality and viability of Edgware town centre.

In addition to retail development, the town centre is also identified an appropriate location for new residential development which would help provide a mixture of uses to make the town centre feel active. The framework acknowledges that there is currently no cinema in Edgware. If planned with other leisure uses such as restaurants and health and fitness clubs, a new cinema could help attract people into the town centre as part of a healthy evening economy.

Local agents indicate that there is a weak office market in Edgware and that supply is currently greater than demand.

North Finchley – Issues and Options Report (June 2009)

An Issues and Options consultation on the North Finchley Town Centre Framework was held in June and July 2009. The report identifies North Finchley town centre is identified as LBB’s third largest centre in terms of commercial floorspace and also has the second highest financial turnover in the town centre network.

The emerging framework establishes the following vision for North Finchley town centre:

> *‘To create a sustainable and distinctive suburban town centre with enhanced shopping facilities and a high quality pedestrian environment. North Finchley will be an attractive place to meet your everyday needs. The centre will provide a sustainable local alternative to some larger centres through the maintenance of a healthy mix of independent and established high street retailers. The south of the centre, with its existing leisure and cultural attractions will provide a focus for further new high quality evening activities.’*

The draft framework states that North Finchley has over 45,000 sqm of retail floorspace with an estimated turnover well above the average turnover for similar sized centres. Whilst the centre is considered large in the borough, North Finchley is of modest size in London wide terms, mainly serving local needs. If larger shop units were developed in the town centre, a wider range of retailers could be attracted to North Finchley, although the report acknowledges a mall decline in the percentage of retail frontage in A1 (retail) use. The report states that North Finchley has strong potential to build on this successful retail market, particularly by encouraging the location of a wider variety of shops where opportunities exist.

The draft framework also states that North Finchley has 211,000 sq ft of office floorspace. Although there is a sufficient supply of office floorspace at present, although there are no spaces above 5,000 sq ft.

The report identifies a number of opportunity sites for development. These include:

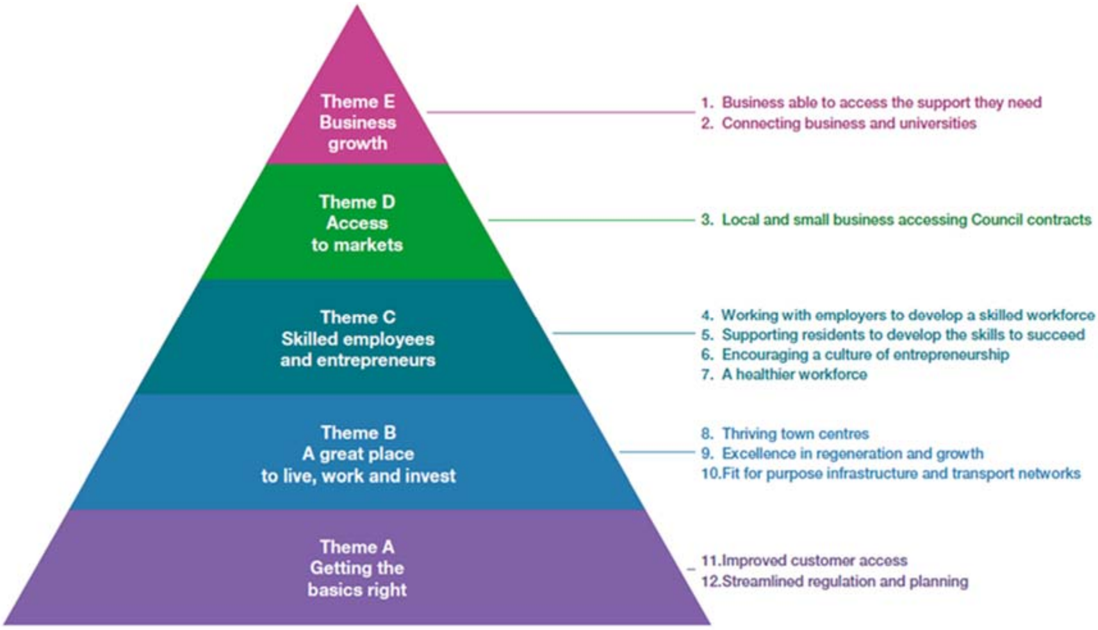
- 931 High Road
- 902 to 928 High Road
- North Finchley Library
- 2a Torrington Park and car park
- Junction of High Road and Lodge Lane
- 795 to 811 High Road (Iceland) and car park to rear
- 782 to 788 High Road
- Car park to rear of 744 to 760 High Road
- 740 to 742 High Road
- Stanhope Road Car park to rear of 730 to 742 High Road
- Stanhope Road Bottom car park adjoining Barnet College
- Castle Road car park adjoining Barnet College
- Balfour House
- 313 to 319 Ballards Lane
- Office block, junction of High Road and Woodhouse Road
- Car park fronting Woodhouse Road
- Homebase.

Entrepreneurial Barnet 2015 - 2020

Entrepreneurial Barnet sets out LBB's approach to supporting businesses and the wider Barnet economy. Entrepreneurial Barnet introduces a new category of "Main" town centre, to sit alongside the existing network of District and Local centres in planning terms. The town centres that are designated as "Main" in Entrepreneurial Barnet are Burnt Oak, Chipping Barnet, Cricklewood, Edgware, Finchley Church End, Golders Green and North Finchley. These town centres have a larger scale and economic gravity than other town and local centres and could also be considered employment hubs especially for small and medium businesses.

The Council has established a series of strategic objectives, which are organised into five themes in order to meet the Council's goal of ensuring that Barnet is 'the best place in London to be a small business'. The strategic objectives are set out below.

Barnet's network of town centres



Source: Entrepreneurial Barnet

In order to achieve Strategic Objective 8 to develop 'thriving town centres' that people want to live, work and spend time in, LBB has developed a strategy to tailor the town centre offer for each type of town centre (main town centre, district town centre and local town centre), including establishing Town Teams and Town Keeps and promoting town centre accessibility. These are shown in the figure below:

Tailoring town centre offer in the borough

Activity	Main Town Centres	District Town Centres	Local Town Centres
Town Teams	Actively supported where there is local demand and potential for them to be operated independently of the Council. This may involve seed funding.	Where there is local demand will actively receive advice and mentoring from the Council.	Where there is local demand will receive information from the Council and encouraged to network with other town teams.
Funding opportunities	Prioritised unless funding has already been allocated for similar intervention in the last two years.	Yes if there is identified local need or if driven locally	Yes if there is identified local need and if driven locally
Support to night time economy	Yes – targeted support focusing on main town centres especially via planning and partnership working with the police.	Yes where there is specific local demand or has been identified as an area of more than local importance to the evening economy.	Only if identified as an area of more than local importance to the evening economy.
Residential Development promoted	Yes – Opportunities actively marketed and promoted to developers and investors.	Where there is market demand.	Where there is market demand.
20mph zones	Where there is local demand and funding 20mph zones will be implemented. Promoted by the Council.	Will be considered on a case-by-case basis according to local need and demand.	Will be considered on a case-by-case basis according to local need and demand.
Markets and street trading	Where there is local need will be actively supported by the Council.	Where there is local demand the Council will provide advice, mentoring and information to support locally-led markets.	Where there is local demand the Council will provide information and networking opportunities to support locally-led markets.
Town Keepers	One for each main town centre, with a wider role to understanding the needs of local businesses and residents and feeding these back.	Where there is identified local need and funding is available.	May share a single town keeper
Town centre accessibility	Actively supported, connection to wider infrastructure and transport links promoted and lobbied for.	Supported where there is local demand or identified need.	Where there is local demand or identified need, and seen as a priority over district town centres.
Parking	There should always be available spaces, even during peak usage.	There should always be available spaces, even during peak usage.	85% capacity at peak periods targeted.

Source: Entrepreneurial Barnet

APPENDIX B TOWN CENTRE HEALTH CHECKS

Healthchecks are colour coded red, amber or green:

- Red denotes that the centre is performing poorly against national indicators;
- Amber denotes that the centre is performing marginally well against national indicators, though there are areas of concern; and
- Green denotes that the centre is performing well against national indicators.

MAJOR OR CANDIDATE MAJOR CENTRES

EDGWARE (MAJOR CENTRE)

Date of survey: 31/05/17



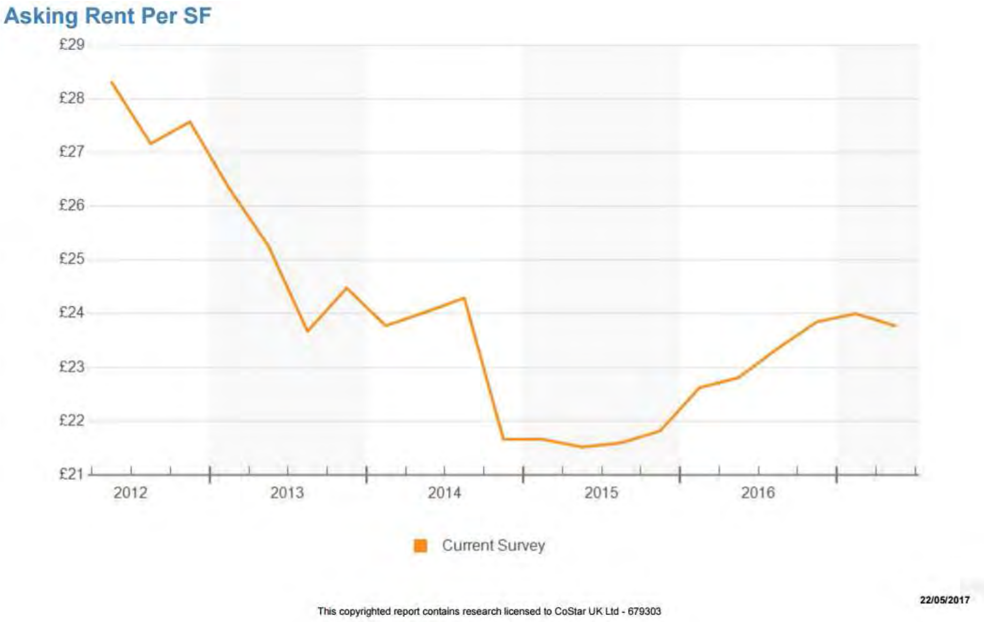
Diversity of uses

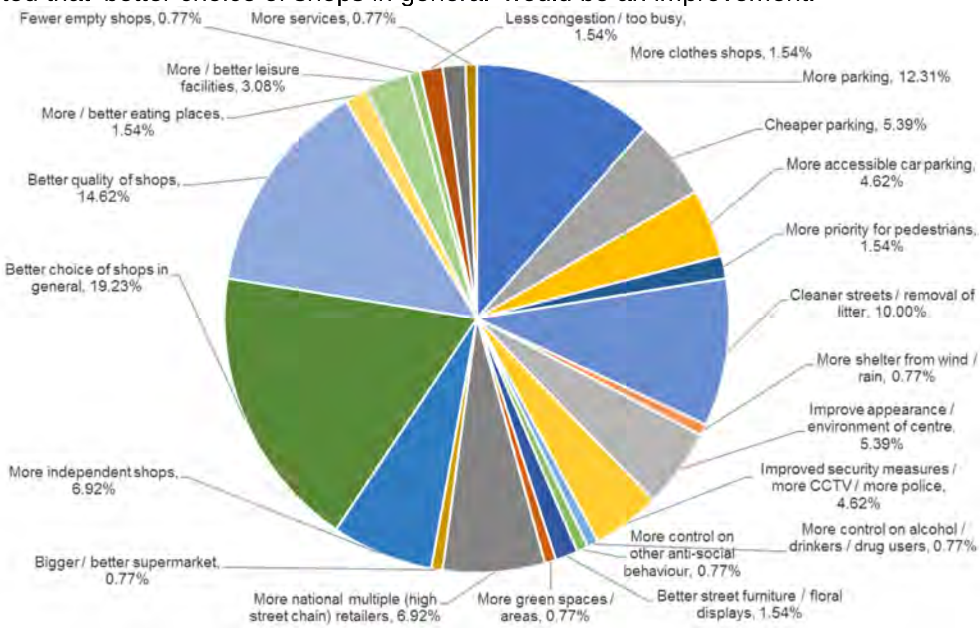
Category	No. of units	% of units	UK %	Floorspace (sq.m)	Floorspace (%)	UK %
Convenience	164	56.2	9.41	24,463	60.44	18.34
Comparison	32	11.0	39.10	4,139	10.23	44.18
Service	76	26.0	38.17	9,199	22.73	25.84
Vacant	16	5.5	12.13	2,141	5.29	10.71
Other	4	1.37	1.19	530	1.31	0.97
Total	292	100	100	40,472	100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

Source: GOAD, PBA

Foodstores	Edgware contains a good range of food stores. The convenience offer is dominated by a Sainsbury's foodstore (370 sq.m net) within the Broadwalk Shopping Centre although there is also an edge of centre Lidl supermarket just on High Street falling within LB Harrow and supplemented by Tesco Express (110 sq.m net), Iceland (200 sq.m net).
National multiples	Approximately 30% of units are occupied by national multiples. The majority of multiple retailers are located in Broadwalk Shopping Centre and include: WH Smith, Marks & Spencer, JD Sports, Superdrug, Argos, New Look, Peacocks, Nandos, Paddy Power, Greggs, Carphone Warehouse, Poundland and Starbucks. The centre also contains seven national banks, including: Nationwide, NatWest Santander, HSBC, Lloyds, Metro bank and Barclays.
Other retail uses & markets	The convenience offer is anchored by a number of main foodstores, listed above, and further supplemented by a number of independent stores selling halal, kosher and ethnic food goods as well as newsagents and off licenses. The Broadwalk centre contains an extensive range of higher and lower value comparison occupiers across all comparison goods categories including a Marks & Spencer and a variety other national multiples as listed above. Outside of the Broadwalk Shopping Centre the mix of tenants is more diverse with occupiers with a mid-low quality offer including Ryman and Snappy Snaps.
Evening economy	The centre contains a range of restaurants and takeaways which contribute to the evening economy and generate footfall outside of the core retail opening hours. There is a limited number of traditional pubs remaining including The Masons Arms and The Three Wishes. The VIP Lounge – a banqueting venue - also provides a function room facility.
Other services	The centre contains a good range of other services and community facilities overall. Services include: cafes, restaurants, beauty salons, hairdressers, Post Office and opticians. The centre contains a range of financial services including betting shops, pawn brokers and seven national banks (Nat West, Halifax, HSBC, Metro, Lloyds, Santander and Barclays). Community facilities include: Edgware Library, St Margaret's Church, Edgware Central Mosque Edgware Masorti Synagogue and Edgware Infant School. In terms of commercial leisure provision, the centre contains a gym, operated by Pure Gym. However, there is no cinema or bowling alley in this which is a notable omission for a major centre. There are currently six charity shops within the centre. These are relatively dispersed throughout the centre, though three are closer together on Station Road. While there are a number of charity shops in the centre, the relative spread is not currently a cause for concern. The vacancy rate of 5.5% is half the national average and the average vacant unit size (135 sq.m) is smaller than the average size of units in the centre as a whole (180 sq.m).

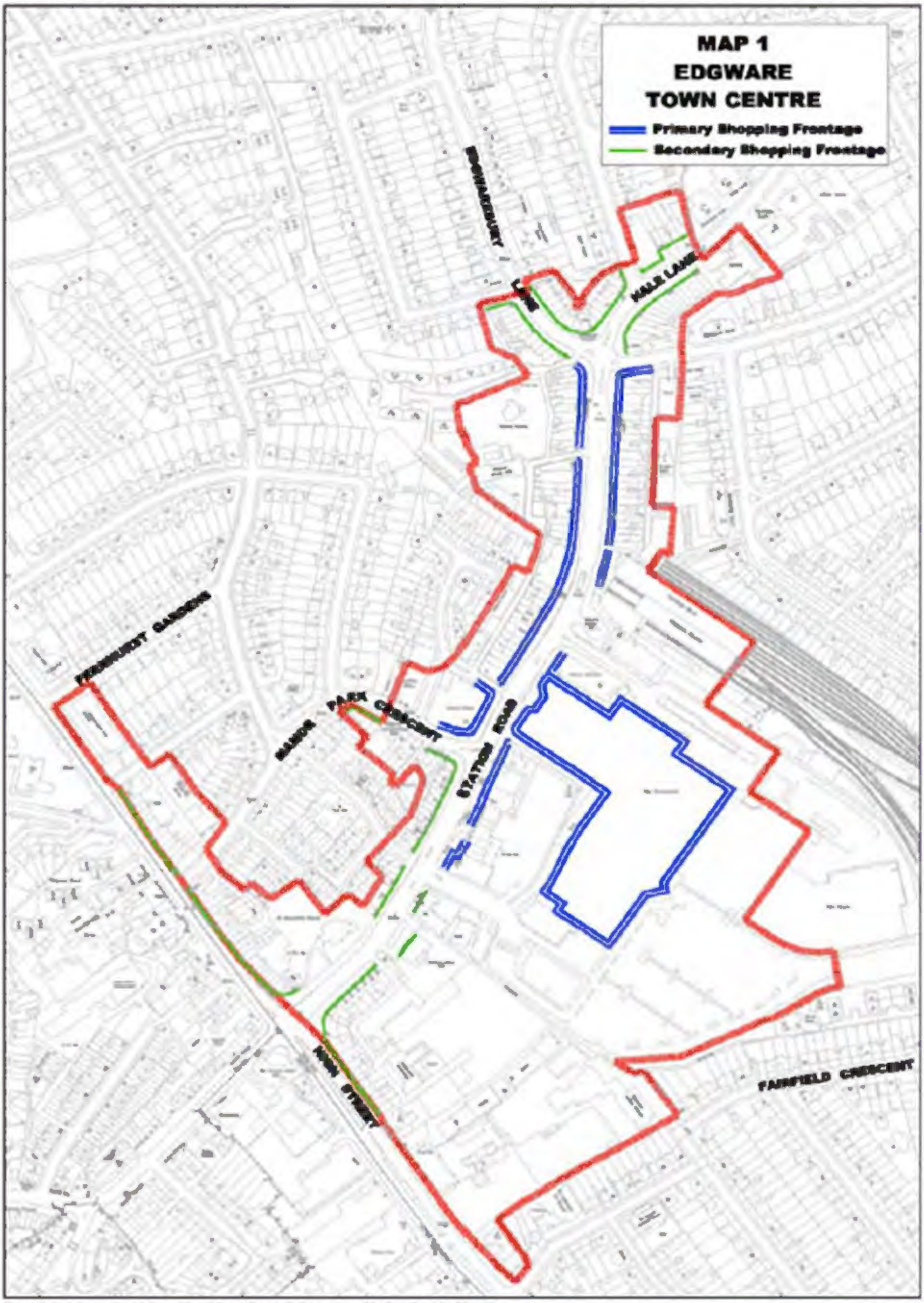
Accessibility	
PTAL	The centre is highly accessible via public transport. This is reflected in the PTAL rating of 6a for the majority of centre with the area around the station rated as 6b. Edgware tube station is served by the Northern line with central London in approximately 30 minutes. The centre is well served by bus services to Brent Cross, Hatfield, Borehamwood, Watford and central London.
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 Broadwalk 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.
Pedestrian linkages & disabled access	The centre is located on a busy main road (Station Road/A5100) although there are multiple pedestrian crossings and good quality wide pavements which aid pedestrian movement. As a purpose built centre, The Broadwalk Shopping Centre affords a shopping environment which is free from vehicular traffic.
Environmental quality	
Retail unit size & quality	The majority of commercial units are provided in mixed use three-storey buildings with residential uses above ground floor level. The Broadwalk Shopping Centre is a purpose built shopping centre which contains a mix of unit sizes.
Access to green space	Chandos Recreation Ground is located approximately 400m south west and Stonegrove Park is located approximately 500m north west from the centre. St Margaret Churchyard on Station Road is also within the centre.
Townscape & street furniture	The northern part of the centre presents an attractive streetscene with high quality shopping parades, presenting an ordered and pleasant pattern of shops. The south end of the centre around the A5/A5100/B461 junction suffers from a relatively poor quality environment due to the dominance of vehicular traffic. Some parts of the centre have benefitted from recent investment in new paving and street planting although street furniture is concentrated at the northern end of the centre. The revamped Broadwalk Centre provides a more positive enhancement to the streetscene. During the daytime a number of shop units along Station Road had metal shutters down which detracts from the streetscape. A significant level of buses travel through the centre, which can have a dominant and polluting presence.
Perception of safety & evidence of crime	No evidence of crime and only some minor graffiti evident.
Development opportunities & recent investment	Development opportunities: The 2013 Town Centre framework identifies the following development opportunities: • Broadwalk Shopping Centre: proposed extension to shopping centre; leisure uses such as a cinema and associated food and drink would be considered appropriate on parts of site. • Land around Premier House and Station Road frontage: opportunity to provide improved commercial units along Station Road, and transform a section of building frontage within the town centre. A mix of uses would be appropriate here, including retail, office, and residential. • Forumside Opportunity Sites: area consists of vacant land, derelict buildings and some light industrial/office uses. Potential for residential-led development. • TfL landholdings (bus depot and tube station) • Post office, NHS clinic sites • Edgware Hospital • Potential Library Recent investment: • Premier House (112 Station Road) – Office to Residential (2015/2016) • Railway Hotel listed building
Commercial yields	According to Co-Star, the five-year average yield is 11.5% (2012-2017). Although not a direct comparison, the borough district centre average is 5.5%. This relatively high yield level reflects weaker investor confidence in the area compared to the boroughs other centres. However, average figures can mask the greater variations in yield levels achieved in individual transactions so should be treated with some care.

<table>
<tr>
<td>Commercial rents</td>
<td>


According to Co-Star, asking rents in Edgware have fluctuated between £28 and £21 per sqft over the past five years as shown in the graph. Asking rents declined sharply from around £24 to £21 per sqft between Q3 2014 and Q3 2015. During this period Co-Star recorded a particularly low value deal- a unit on Station Road was leased to Robert Dyas for just £17 per sqft in Q4 2014. The Edgware five-year average asking rent is £23.65 per sqft which is slightly lower than the borough district centre five-year average of £24.42 per sqft.
</td>
</tr>
<tr>
<td>Customer views & behaviour</td>
<td>
Of those that accessed Edgware, 37.69% noted no improvements. While 19.23% noted that ‘better choice of shops in general’ would be an improvement.


</td>
</tr>
<tr>
<td>Retailer requirements</td>
<td>According to Shopproperty there are 11 current retailer requirements in Edgware ranging from 100 sq.m gross up to 1,000 sq. m gross. Requirements for national multiples include: The Range, Aldi, Travelodge, Virgin Media, The Fragrance Shop, Brighthouse and Wilko. This indicates a healthy level of interest from retailers seeking representation in the centre. However, it should be noted that some retailers publish generic requirements wider geographic areas rather than individual centres. In addition, some retailers do not publish stated requirements and therefore there could be a latent demand for representation in some centres.</td>
</tr>
</table>

<table>
<tr><th colspan="3">Recommendations</th></tr>
<tr><td rowspan="2">Summary (SWOT)</td><td>Strengths
High public transport accessibility and proximity to tube station;
The Broadwalk Shopping Centre provides a modern shopping environment and a range of unit sizes;
Strong presence of national multiples, attracting visitors from further afield.</td><td>Weaknesses
Strong vehicular traffic flows in particular bus movements create a poor pedestrian environment during busy periods;
Falling asking rents suggest a fall in demand in the centre;
Poorer quality units at peripheries of the centre contribute to poor townscape quality.</td></tr>
<tr><td>Opportunities
Enhance the streetscape by improving appearance of poorer quality buildings;
Attract cinema and national food and drink multiples to establish Edgware as a leisure shopping destination; and
Potential to improve and expand provision for the evening economy.</td><td>Threats
Loss of footfall on the high street due to pull from Broadway Shopping Centre;
Falling asking rents suggest a fall in operator demand;
Limited footfall at the periphery of the centre.</td></tr>
<tr><td>Recommendation</td><td colspan="2">Good health: The centre is currently performing well against the majority of indicators. Edgware has a diverse retail offer with a mix of national multiples and independent operators present in both the convenience and comparison categories. The centre would benefit from interventions to enable the centre as a whole to benefit from the high levels of footfall generated by the Broadwalk Shopping Centre. The centre would benefit from redevelopment of current development opportunities to provide a greater range of leisure uses and night-time economy uses which are currently limited for a major centre. The centre is considered to function in line with its position in the hierarchy.</td></tr>
</table>


MAP 1
EDGWARE
TOWN CENTRE
Primary Shopping Frontage
Secondary Shopping Frontage
HALE LANE
STATION ROAD
HIGH STREET
FAIRFIELD CRESCENT
PARK CRESCENT

NORTH FINCHLEY (CANDIDATE MAJOR CENTRE) Date of survey: 05/05/17

Uses by category

Category	No. of units	% of units	UK %	Floorspace (sq. m)	Floorspace (%)	UK %
Convenience	23	10.7	9.41	6890	21.1	18.34
Comparison	57	26.6	39.10	8270	25.3	44.18
Services	115	53.7	38.17	15370	47.0	25.84
Vacant	16	7.5	12.13	2070	6.3	10.71
Other	3	1.4	1.19	90	0.3	0.97
Total	214	100.0	100	32690	100.0	100

Source: GOAD/PBA

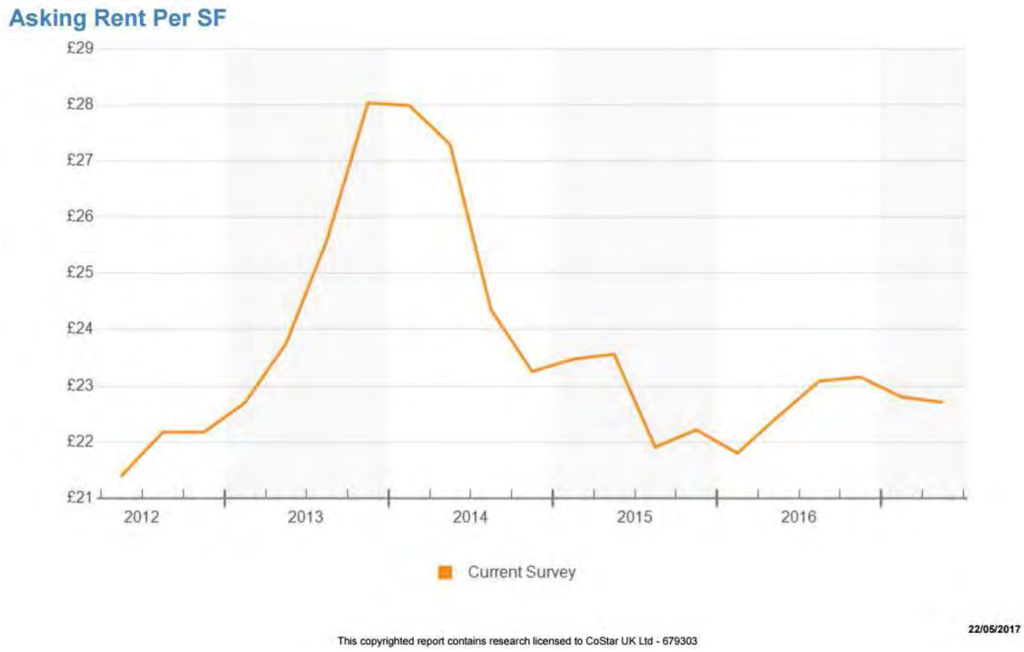
Diversity of uses & retailer representation

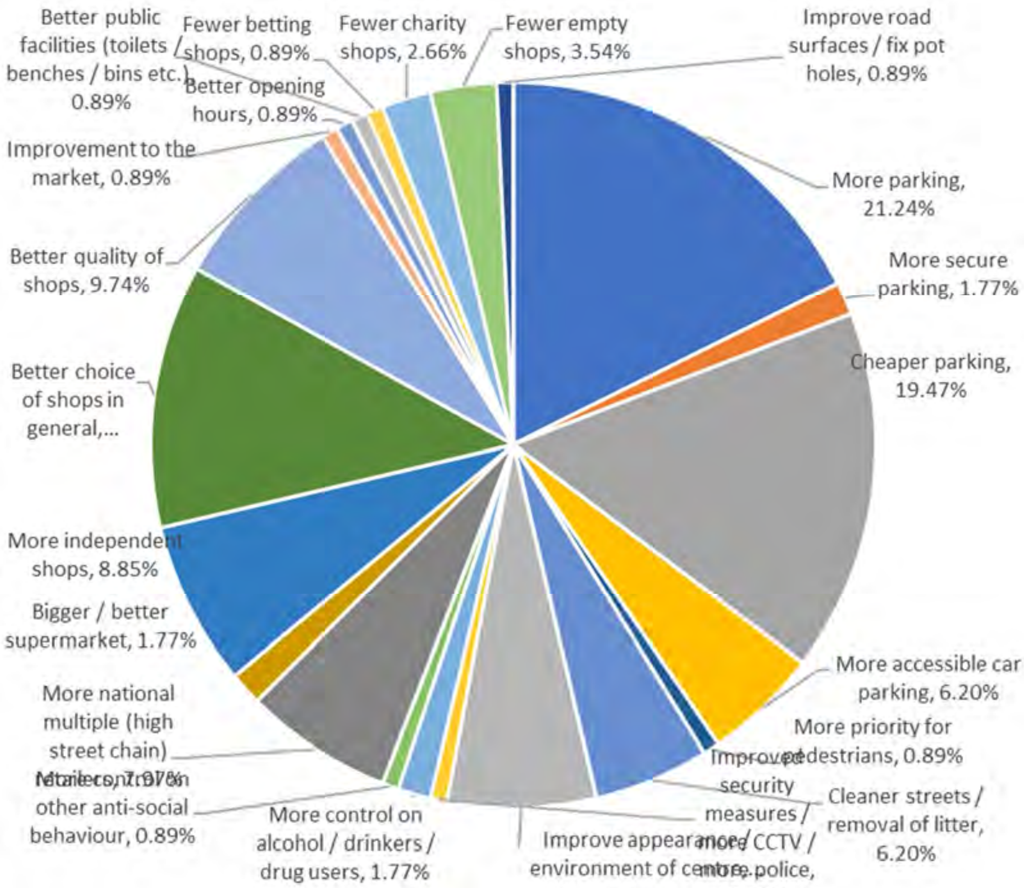
Foodstores	North Finchley's convenience provision is slightly higher than the national average. The main foodstore is Sainsbury's on High Road (4,320 sq.m gross), however there is also an Aldi foodstore on Ballards Lane and a Tesco Express on High Road. Whilst not in the District Centre boundary, there is also a Waitrose (2,526 sq.m gross) on Ballards Lane. The total number of convenience units has increase by 4 since the last survey undertaken for the 2009 retail study.
National multiples	There is a strong representation from multiple comparison operators including Argos, Waterstones, River Island, Boots, WH Smiths, Robert Dyas and Poundland. There is also large Homebase store to the South of the District Centre. Café and restaurant multiples present are Costa Coffee and Starbucks, mobile phone multiples Vodafone, O2 and Carphone Warehouse; and bookmakers Paddy Power and William Hill. The number
Other retail uses & markets	In addition to the multiple operators, there is a good range of independent cafés and restaurants, public houses, bars and hot food takeaways. Banks and building societies (including NatWest, Barclays, HSBC, Nationwide, Halifax and Santander) are well represented being clustered to the north of the District Centre. There are four estate agents spread through the centre, with Foxtons being the only multiple. The North Finchley Market is held every Friday at the Lodge Lane car park. In addition, the 'North Finchley Feast' market takes place every Sunday between the 11am and 2pm at the Grand Arcade.
Evening economy	As identified above, North Finchley provides a good range of independent restaurants, public houses (Bohemia Pub), bars and hot food takeaways which all contribute to the centre's growing evening economy. However, the area has not yet generally attracted higher end or recognised multiple brands of the food and beverage industry. The Arts Depot (art & performance centre) provides the main evening entertainment facility- the 395 seat theatre hosts a wide range of shows and the studios provide creative learning opportunities for children and young people. The centre does not contain a cinema or bowling alley- the nearest cinema is Vue at the Great North Leisure Park.
Other services	Retail services are well represented with numerous independent hairdressers and beauty salons, a spa, tattoo parlours, and a Post Office. Other services include a Public Library and the Arts Depot (art & performance centre). Leisure provision includes a PureGym accessed off Kingsway.

Accessibility

Public transport & PTAL	Whilst the centre does not have a direct tube connection (the nearest being to the south west at Finchley), it is within walking distance of Woodside Park and West Finchley stations. It is well served by public transport provision; this includes the regular 263 bus service (Highbury and Islington) on High Road and the 626 and 683 services (Finchley Central and Hendon). In terms of the PTAL rating the District Centre is predominantly PTAL 4, however Kingsway at the south of the Centre is PTAL 3.

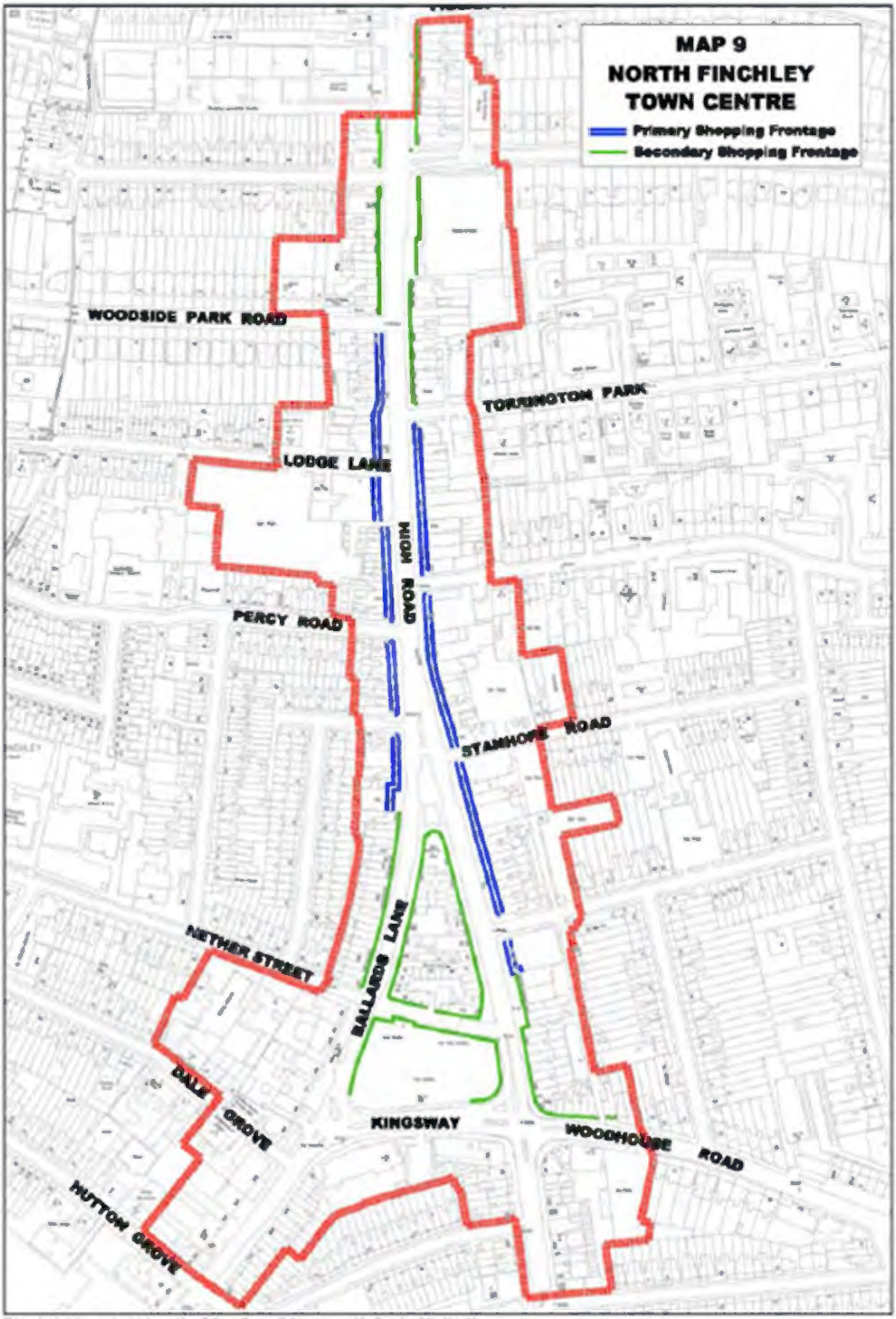
Car parking	Aldi Car Park (customers only – pay); Woodhouse Road (11 spaces) (pay); Castle Road (50 spaces) (pay); Stanhope Road Top (32 spaces) (pay); Stanhope Road Main (52 spaces) (pay); Lodge Lane Car Park (232 spaces) (pay).
Pedestrian linkages & disabled access	The linear nature of the centre is easy to navigate and access by disabled users is generally possible though some shops only have stepped access. A number of side streets allow for movement between High Road and Ballards Lane. Pedestrian crossings are prevalent through the centre. Pavements are wide enough to accommodate a range of users.
Environmental quality	
Retail unit size & quality	As a predominantly linear high street, the majority of the centre's units are smaller, however larger floorplate units (either through amalgamation or redevelopment) have been created to accommodate primarily multiple retailers. Building quality is generally good along High Road, particularly where the multiple retailers are present. However, at more peripheral north and south of the centre a number of vacant units are clustered which detract from the overall quality of the centre. There is a variety of architectural styles in the building stock. In places it would benefit from restoration. The shop units, particularly at the south of High Road that could benefit from restoration / renovation.
Access to green space	Swan Lane open space (approx. 15 minutes' walk), Friary Park (approx. 15 minutes' walk). It is identified as an area of public open space deficiency.
Townscape & street furniture	This is reasonable: High Road being tree lined and containing a number of seating areas. However there is not a clear centre point acting as 'heart of the town centre', lack of distinctive gateways, poor public realm, no cycling facilities. The level of litter observed during our visit was greater than other similar scale centres including evidence of litter build-up adjacent to bins.
Perception of safety & evidence of crime	There was no evidence of crime or antisocial behaviour during our visit. Crime statistics for North Finchley indicate that the level of reported crime has remained relatively steady but perception that area could be intimidating at night. The council advise that anti-social behaviour has been reported, including street drinking, drug dealing and begging.
Development opportunities & recent investment	Recent investment: - There has limited recent investment in North Finchley, with the most significant change occurring in 2004 when the building containing 'arts depot' theatre, cinema, gallery and cafe building was completed. The building also has a significant ground floor footprint housing Aldi, Paddy Power, William Hill and PureGym. Development opportunities: - An emerging North Finchley SPD is being produced which identifies six opportunity sites: Tally Ho Triangle/ Arts Depot, Ballards Lane/ Nether Street, Finchley House, East Wing, Friern Park/ High Road and Lodge Lane. - Opportunity for new residential development above some shop units could be explored. - Potential for redevelopment/ reconfiguration at the south of the centre, where quality of built environment is lower, could also be explored
Commercial yields	According to Co-Star, the five-year average yield for North Finchley is 4.9% which is low compared to the borough district centre average of 5.5%. This low yield level reflects generally strong investor confidence in the area. However, average figures can mask the greater variations the yield levels achieved in individual transactions so should be treated with some care.

<table>
<tr>
<td>Commercial rents</td>
<td>


According to Co-Star, asking rents in North Finchley have fluctuated between £21 and £28 per sqft over the past five years as shown in the graph. Asking rents increased sharply from around £22 to £28 per sqft between Q1 2013 and Q4 2015. During this period Co-Star recorded two high value deals- two units on the High Road were leased for £37 and £55 per sqft respectively in Q1 2014. The North Finchley five-year average asking rent is £23.56 per sqft which is slightly lower than the borough district centre five-year average of £24.42 per sqft. However, average rent figures should be treated with a degree of caution since they can mask greater variations recorded in individual transactions.
</td>
</tr>
<tr>
<td>Customer views & behaviour</td>
<td>
Of those that use North Finchley as their main centre, 31.86% stated no improvements. Of those that did note an improvement, the highest was ‘more parking’ with 21.24%


</td>
</tr>
<tr>
<td>Retailer requirements</td>
<td>There are four retailer requirements currently published for North Finchley, ranging from 850 sq. ft. to 20,000 sq. ft. Retailers include national multiples such as Café Nero and Wilko.</td>
</tr>
</table>

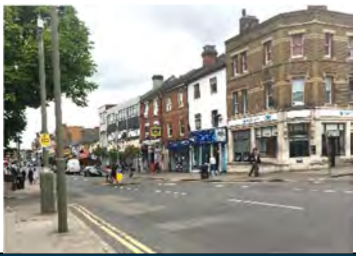
<table>
<tr><th colspan="3">Recommendations</th></tr>
<tr><td rowspan="2">Summary (SWOT)</td><td>Strengths
▪ Variety of retail, cafes, restaurants and service provision available;
▪ Strong presence of a mix of popular national multiples;
▪ Leisure offer provided by restaurants / bars and cinema / theatre at the Arts Depot;
▪ Good level of parking provision;
▪ Low vacancy rate.</td><td>Weaknesses
▪ Current levels of cleanliness and littering;
▪ Busy road junction;
▪ Relatively high concentration of lower quality operators at north and south peripheries;
▪ Long high street creating an unwieldy centre lacking in cohesion;
▪ Disjointedness of centre following juncture of Ballards Lane and High Road.</td></tr>
<tr><td>Opportunities
▪ Enhance townscape through improvements to existing building stock;
▪ Potential for amalgamation/ reconfiguration of retail units on the periphery of the centre to be more attractive to multiple retailers. Reach critical mass of quality retail and leisure operators to attract new operators and footfall to the centre;
▪ Increased leisure provision to enhance the evening economy;
▪ Enhance linkages between Ballards Lane and High Road i.e. using Ten Grand Arcade.</td><td>Threats
▪ Potential loss of comparison multiples due to consolidation by retailers in response to wider market trends including increased use of online shopping;
▪ Growing number of betting shops, payday loan lenders and charity shops;
▪ The linear nature of High Road can blur the boundaries between North Finchley and other centres on High Road such as Whetstone;
▪ Failure to enhance the offer in the more peripheral parts of the centre may lead to stagnation in the performance of the centre;
▪ Linked to the above, a greater predominance of discount stores could undermine the retail mix, and thus changing the perception of the centre.</td></tr>
<tr><td>Recommendation</td><td colspan="2">Good health. Overall the centre is performing well due to the relatively strong presence of key multiple retailers, cafes, restaurants and leisure provision, and varied mix of independent retailers. The convenience offer are key attractors are the Sainsbury’s and Waitrose stores. Together with a substantial Homebase still act as key attractors to the centre. Additionally, the food and drink and leisure offer increases dwell time in the centre and generates good levels of footfall to support independent retailers. Limited change to the centre has occurred since the previous study was undertaken and suitable re-development and reconfiguration opportunities will assist in ensuring the centre continues to be attractive to both multiple and independent retailers. The functioning of the centre is considered to be in line with the shopping hierarchy.</td></tr>
</table>


MAP 9
NORTH FINCHLEY
TOWN CENTRE
Primary Shopping Frontage
Secondary Shopping Frontage
WOODSIDE PARK ROAD
TORRINGTON PARK
LODGE LANE
HIGH ROAD
PERCY ROAD
STANHOPE ROAD
NETHER STREET
BALLARDS LANE
DALE GROVE
KINGSWAY
WOODHOUSE ROAD
HUTTON GROVE

DISTRICT CENTRES

BRENT STREET (DISTRICT CENTRE)

Date of survey: 31/05/2017

Uses by category

Category	No. of units	% of units	UK %	Floorspace (sq. m)	Floorspace (%)	UK %
Convenience	25	12.4	9.41	2,930	17.9	18.34
Comparison	32	15.9	39.10	2,080	12.7	44.18
Services	125	62.2	38.17	9,964	60.9	25.84
Vacant	19	9.5	12.13	1,390	8.5	10.71
Other	0	0.0	1.19	0	0.0	0.97
Total	201	100.0	100	16,364	100.0	100

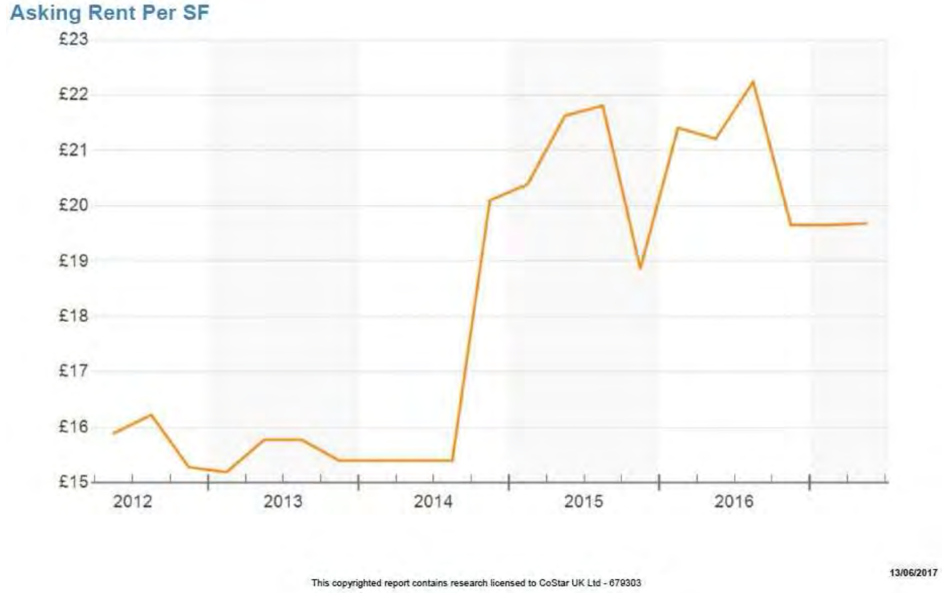
Source: GOAD and PBA

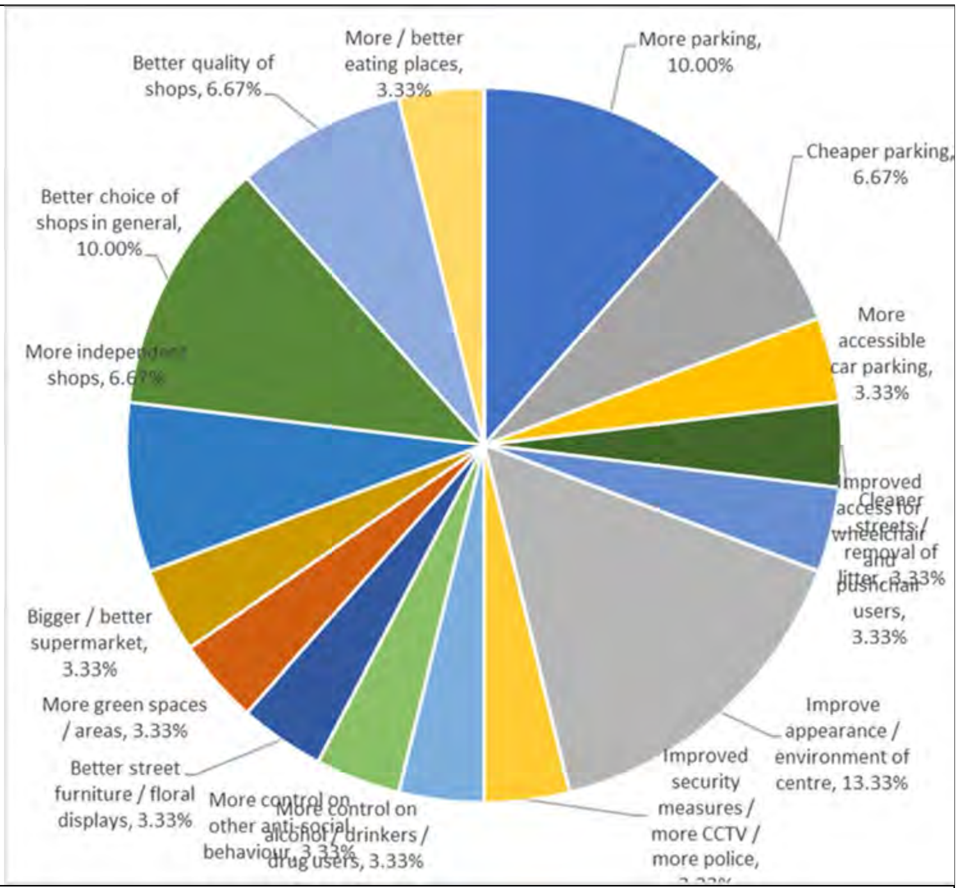
Diversity of uses & retailer representation

Foodstores	There is a Tesco Metro foodstore (940 sq. m gross) within the Sentinel Shopping Centre, a M&S Simply Food within the BP petrol filling station on Finchley Road, as well as a number of local convenience stores (including greengrocers, delis, bakeries, newsagents, off licences, specialist ethnic stores and a cobbler).
National multiples	Generally limited representation in this area, with no comparison retail multiples within the centre. In terms of financial and professional occupiers there are three banks represented (NatWest, Lloyds and Barclays). In addition, there are three betting shops (William Hill, Ladbrokes and Paddy Power) as well as the BP petrol filling station. There is also a Winkworth estate agent.
Other retail uses & markets	There is a very strong independent shopping provision, including local DIY, household goods, furniture stores and a range of local mini-marts, kosher stores and specialist food providers. The retail service sector is also well established with a variety of local estate agents, dry cleaners, hair dressers, beauty salons/ spas, travel agents, dentist and a Post Office.
Evening economy	There are a large number of independent food and drink operators including a number of hot food takeaways although there is limited provision of drinking establishments and restaurants which would generate footfall in the evening hours. There are no cinemas, bowling alleys or public houses in the centre.
Other services	There are a number of more substantial office buildings in the centre including the GMB Union, a Jobcentre and service offices at Churchill House. Leisure provision is limited overall, though the centre does a small local gym operator in the Sentinel shopping centre, a church and a Synagogue. There are a number of education facilities located within or in close proximity to the district centre which generate day time footfall; Brampton College are located within the centre and Hendon Middlesex University Campus is located immediately west of the district centre.

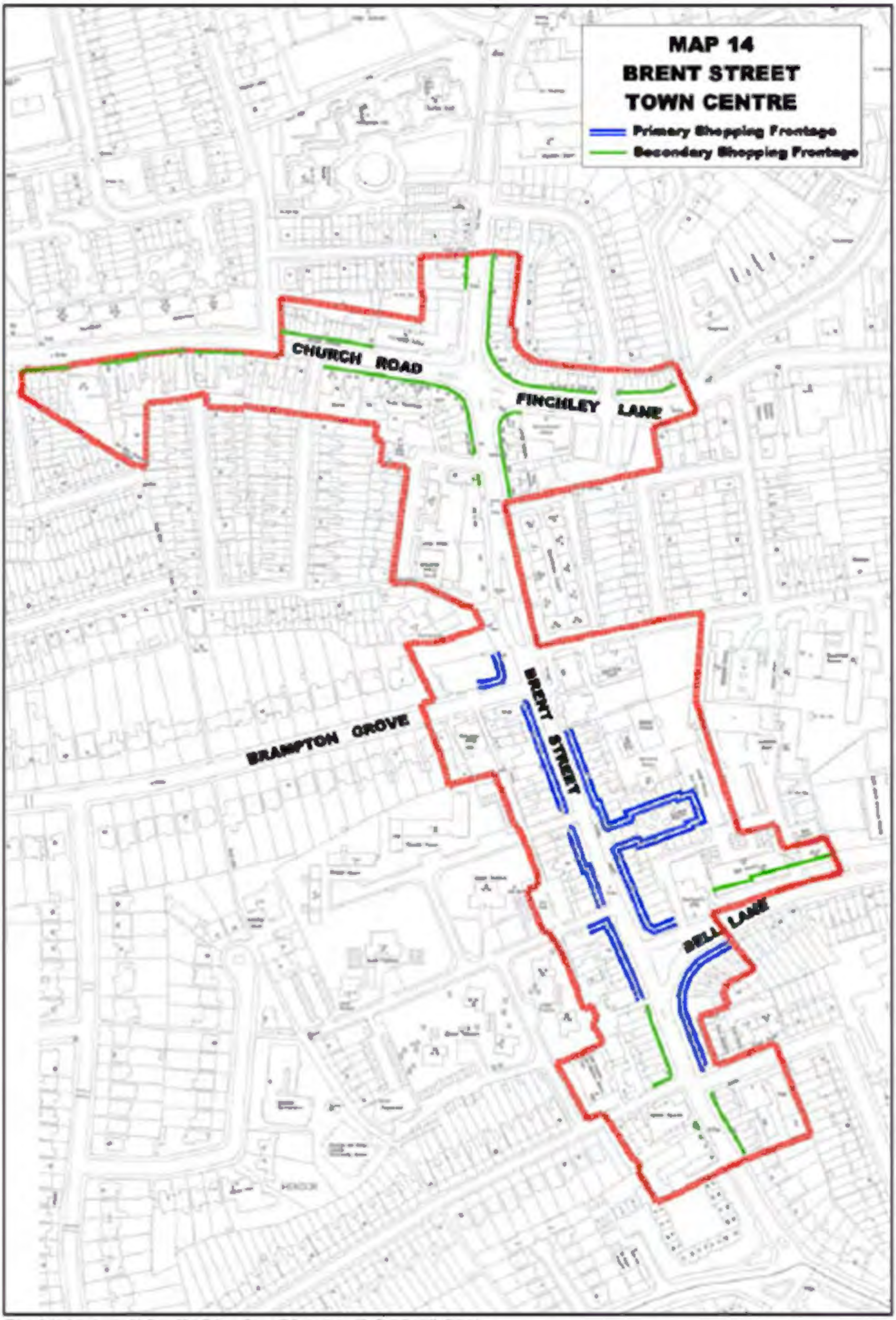
Accessibility

Public transport & PTAL rating	Brent Street has a range of good public transport connections. It is served by several regular bus routes including services 183 and 240 (to Golders Green). It is also within a short walking distance of Hendon Central tube station on the Northern Line. Hendon railway station is also approximately 1km west of the centre. The PTAL rating is 2 / 3.
Car parking	New Brent Street (26 spaces) (free); The Burroughs (50 spaces) (pay). Also limited on-street parking along Brent Street, Church Road and Finchley Lane.
Pedestrian linkages & disabled access	Generally good pedestrian linkages across the centre owing to its linear form. Whilst the junction at Brent Street / Finchley lane is busy, the provision of pedestrian crossings is good, enabling pedestrians easy access to all areas of the centre. Pavements are generally wide and their overall quality is good to moderate. The majority of shop units have level access.

Environmental quality	
Retail unit size & quality	Retail unit quality is generally moderate, with some good quality units in the north of the centre. However, some units are poor, particularly to the south. Noticeably high number of neglected vacant units (particularly at south of the centre). Whilst well used, the Sentinel Square Shopping Centre precinct could benefit from refurbishment or redevelopment to modernise the appearance.
Access to green space	Hendon Park and Sunny Hill Park are located approximately 200m from the southern end and north-western end of the district centre respectively.
Townscape & street furniture	The south end of the centre provides some street planting, though there is minimal street planting at the north end of high street. No seating is provided throughout the whole centre. Sufficient number of litter bins and minimal littering. The pavements in some areas are not well maintained and unclean.
Perception of safety & evidence of crime	Generally good. No evidence at anti-social behaviour or crime. However, sentinel square could be an intimidating / unsafe environment at night due to the lack of active evening economy uses to provide natural surveillance.
Development opportunities & recent investment	Possible development opportunities: - Sentinel Square Shopping Centre - Vacant site opposite 157 Brent Street Recent investment: - Middlesex University Hendon Campus - Upper and Lower Fosters Estate Regeneration - Hendon Salvation Army Community
Commercial yields	According to Co-Star, the five-year average yield of 4.4% which is low compared to the borough district centre average of 5.5% (2012-2017). This low yield level reflects generally strong investor confidence in the area. However, average figures can mask the greater variations in yield levels achieved in individual transactions so should be treated with some care.
Commercial rents	 According to Co-Star, asking rents in Brent Street have fluctuated between £16 and £22 per sq.ft over the past five years as shown in the graph. Asking rents increased sharply from around £15 to £22 per sq.ft between Q4 2014 and Q3 2015. During this period Co-Star recorded two high value deals with asking rents of £29 and £30 per sq.ft. The Brent Street five-year average asking rent is just £19.56 per sq.ft compared to the borough district centre average of £24.42 per sq.ft.
Customer views & behaviour	53.33% stated no improvements. Of those that did mention the need for improvements, the highest was ‘improve appearance/environment of centre’ with 13.33%.



Retailer requirements	There are no current retailer requirements published for Brent Street. However, it should be noted that some retailers do not publish stated requirements and therefore there could be a latent demand for representation in some centres.	
Recommendations		
Summary (SWOT)	**Strengths** ▪ Strong and varied provision of services, ▪ Good quality building stock at the north of the centre; ▪ Proximity to University campus; ▪ Strong cultural identify.	**Weaknesses** ▪ Relatively low public transport accessibility; ▪ North and south areas of Brent Street are disconnected; ▪ Limited provision of national multiples.
	Opportunities ▪ Development opportunity sites, including opportunity to redevelop the Sentinel Square Shopping Centre to further increase the footfall; ▪ Enhance the connection between north and south (dual carriageway part); ▪ Enhancement of evening economy to cater to student population demand.	**Threats** ▪ Limited number of national multiples and quality operators linked to existing poor quality building stock; ▪ Significant number of banks in the centre which may come under risk of closure; ▪ Failure to attract significant footfall due to relatively low public transport accessibility.
Recommendation	**Underperforming**. The centre is considered to underperform against a number of key health indicators. The South part of the centre requires particular focus in order to improve the environment and quality of shop units. The modernisation of the Sentinel Shopping Centre would benefit this part of the centre and could serve as a catalyst for further change. The centre appears to serve the multi-cultural population well with a good range of services and convenience stores including many specialist independent food stores however the centre lacks a large format supermarket.	


MAP 14
BRENT STREET
TOWN CENTRE
Primary Shopping Frontage
Secondary Shopping Frontage
CHURCH ROAD
FINCHLEY LANE
BRENT STREET
BRAMPTON GROVE
BELL LANE

BURNT OAK (DISTRICT CENTRE)	Date of survey: 13/06/2017

Uses by category

Category	No. of units	% of units	UK %	Floorspace (sq.m)	Floorspace (%)	UK %
Convenience	51*	24.88*	9.41	6,010~	40.7~	18.34
Comparison	42*	20.49*	39.10	3,970~	26.9~	44.18
Service	101*	49.27*	38.17	4,420~	30.0~	25.84
Vacant	6*	2.93*	12.13	350~	2.4~	10.71
Other	5*	2.44*	1.19	0~	0.0~	0.97
Total	205*	100.00*	100	14,750~	100.0~	100

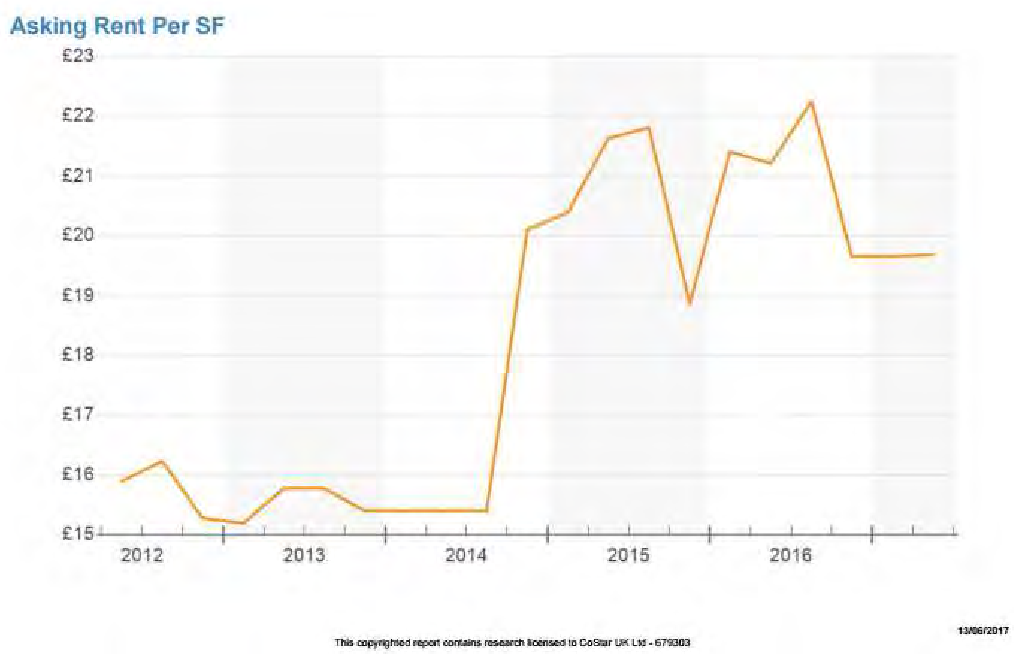
Source: GOAD, LB Brent, LB Harrow and PBA research
*Figures include all units situated within the town centre boundary where it is shared with neighbouring boroughs.
~Figures for units within LBB boundary only.

Diversity of uses & retailer representation

Foodstores	Burnt Oak centre is also shared between the London Borough of Brent (west of Burnt Oak Broadway and south of Stag Lane) and LB Harrow (west of the Burnt Oak Broadway and north of Stag Lane). Representation from multiple retailers is generally limited, with Tesco Metro (1,200 sq.m gross) and Costcutter (180 sq.m gross) falling within the centre. Whilst Iceland is also present on Burnt Oak Broadway, it is on the west side of the street outside of the town centre boundary. There are also a significant number of independent and international local convenience stores including Food4Less, African food store and Aran Supermarket as well as individual bakers, green grocers, fish mongers and butchers. This is reflected in the proportion of convenience retail outlets in Burnt Oak being notably higher than the UK average. (25% compared to the UK average of 9.4%).
National multiples	Burnt Oak has a relatively limited representation from multiple comparison retailers. Savers is the only multiple with the LB Barnet boundary with Shoezone, Peacocks and Poundland being present on the west side of Burnt Oak Broadway. As a consequence, the proportion of comparison retail provision in Burnt Oak is lower than the UK average (20% of total units compared to the UK average of 38.1%). This reflects the role of the centre which is predominantly focussed on convenience and service provision.
Other retail uses & markets	Despite the comparatively low comparison retail provision, the centre does have a reasonable mix of independent comparison retailers including men and women's fashion, florists, charity shops, a furniture shop, DIY and hardware store and a discount household goods store. The financial and professional sector has a very limited presence with only TSB present in the centre following the closure of Natwest. National coffee chain Costa is present as well as a Greggs. In addition, three national betting shop chains (William Hill, Paddy Power and Ladbrokes) are present in the centre. Whilst the level of representation from multiple chains is relatively low in light of the size of the centre, this is because the retail provision within the centre is characterised by a strong independent offer. This is shown in the level of vacancies reducing (from 15 down to 9) from the previous study to close to the national average. Retail services are well represented including numerous hairdressers, beauty salons, dry cleaners and launderettes. Watling Market is located to the rear of Burnt Oak tube station. Numerous cafes and international restaurants are present throughout the centre reflecting the multicultural population. The market is not currently operational and the lease to operate the market is currently being advertised by LB Barnet.
Other services	A post office, library and a number of churches of varied faiths are present.
Evening Economy	Burnt Oak has limited evening activity due to its role as a service centre for primarily everyday items and daytime services, together with its excellent transport links to central London. As a consequence, the centre has relatively few bars and public houses as well as no local theatres or cinemas. Nevertheless, there is a substantial range of restaurants and hot food takeaways which provide some night-time activity.

Accessibility	
Public transport & PTAL	The centre has excellent accessibility by public transport being directly served by the Burnt Oak tube station on the Northern line. Frequent bus services are also present to and from the centre including the following bus services: 32, 204, 251, 305 (Edgware), 142, (Watford junction), 292 (Borehamwood), 302 (Mill Hill Broadway). In total 11 bus services operate through the centre along Burnt Oak Broadway, Stag Lane and Watling Avenue. The excellent public transport links are reflected in the PTAL rating which is 6a along Burnt Oak Broadway and 6b for Watling Avenue.
Car parking	Watling Avenue (227 spaces) (pay). Car park serving Tesco (approximately 50 spaces)
Pedestrian linkages & disabled access	Burnt Oak Broadway is a wide main road with a busy junction at Watling Avenue. There are a number of crossing points, however it does present a barrier to pedestrians fully navigating the centre. This is difficult to improve in light of the status of the A5 as a main distributor road. Nevertheless, we observed good footfall activity during our visit. Watling Avenue has a more intimate feel with pedestrian refuges to enable ease of crossing by pedestrians. Consequently, Watling Avenue has the greatest footfall and general activity, particularly due to its proximity to the tube station. Most shops have level access, however a small number still retain a step. The pedestrian refuges also allow safe passage including for wheelchair users.
Environmental quality	
Retail unit size & quality	Shop units are largely small (particularly on Watling Avenue) reflecting the shopping parade layout that is predominant in the centre. The exceptions to these are on Burnt Oak Broadway, where a small number of larger floorplates are present to accommodate multiple retailers and some of the larger local convenience stores. The quality of the units is generally good, although a number of units along Watling Avenue have a somewhat tired appearance and would benefit from renovation.
Access to green space	Access to green space is good with two options available within a short walking distance: Watling Park (approximately 7 min's walk) and Montrose Playing Fields (approximately 3 mins' walk).
Townscape & street furniture	Generally good townscape, which is characterised by a varied mix of shops, providing a vibrancy to the centre particularly along Watling Avenue. Shutters and boards can detract from the street scene when not open. Burnt Oak Broadway is served by the A5 which does detract to some extent from the overall enjoyment of the centre. Street furniture somewhat functional, with a good provision of litter bins. Public realm improvements to street furniture would assist in bolstering the attractiveness of the centre including the Burnt Oak Conservation Area (the Watling Estate), particularly the provision of more benches as well as soft landscaping. Some litter was evident during the visit despite the presence of litter bins.
Perception of safety & evidence of crime	There was no evidence of antisocial behaviour or crime at the time of our visit. However, some anti-social activity has been reported near Watling Avenue including street drinking, drug dealing, knife possession, and dumping of rubbish in the Silkstream. Notwithstanding this, the level of footfall in the centre provides generally good natural surveillance and therefore the perception of crime is feels relatively low.
Development opportunities & recent investment	Development opportunities: • The Watling Avenue car park and Watling Market site could offer some potential for retail redevelopment / re-provision of a new market as part of a higher density development. Recent investment: • New residential development (Aurora Apartments) on Burnt Oak Broadway, though this does lead to a gap in retail provision.
Commercial yields	According to Co-Star, the five-year average yield for Burn Oak is 4.1% which is low compared to the borough district centre average of 5.5%. This low yield level reflects generally strong investor confidence in the area. However, average figures can mask the greater variations the yield levels achieved in individual transactions so should be treated with some care.

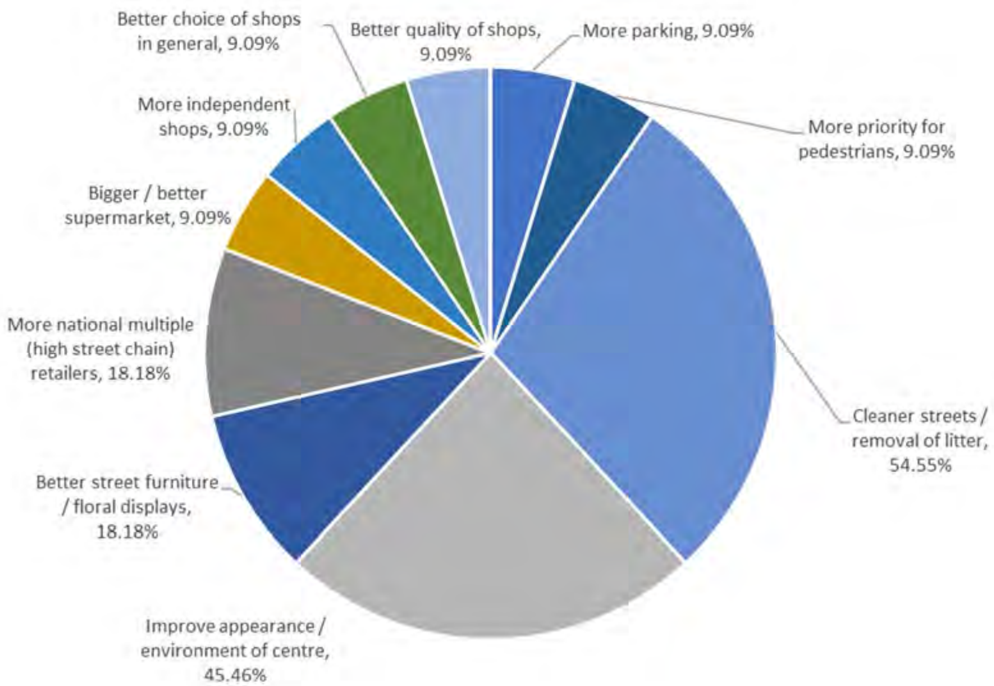
Commercial rents



According to Co-Star, asking rents in Burnt Oak have fluctuated between £16 and £22 per sq.ft over the past five years as shown in the graph. Average asking rents increased sharply from a low of £15 per sq.ft in Q3 2014 up £22 per sq.ft Q3 2015. Co-Star recorded five deals in 2015 compared to just two deals recorded in 2014 which explains why average rents levels increased so sharply. The Burnt Oak five-year average asking rent is £17.10 per sq.ft which is lower than the borough district centre five-year average of £24.42 per sq.ft. Burnt Oak has the second lowest five-year average asking rent out of all district centres in the borough which suggests that the area is less attractive to operators. Average rent figures should be treated with a degree of caution since they can mask greater variations recorded in individual transactions.

Customer views & behaviour

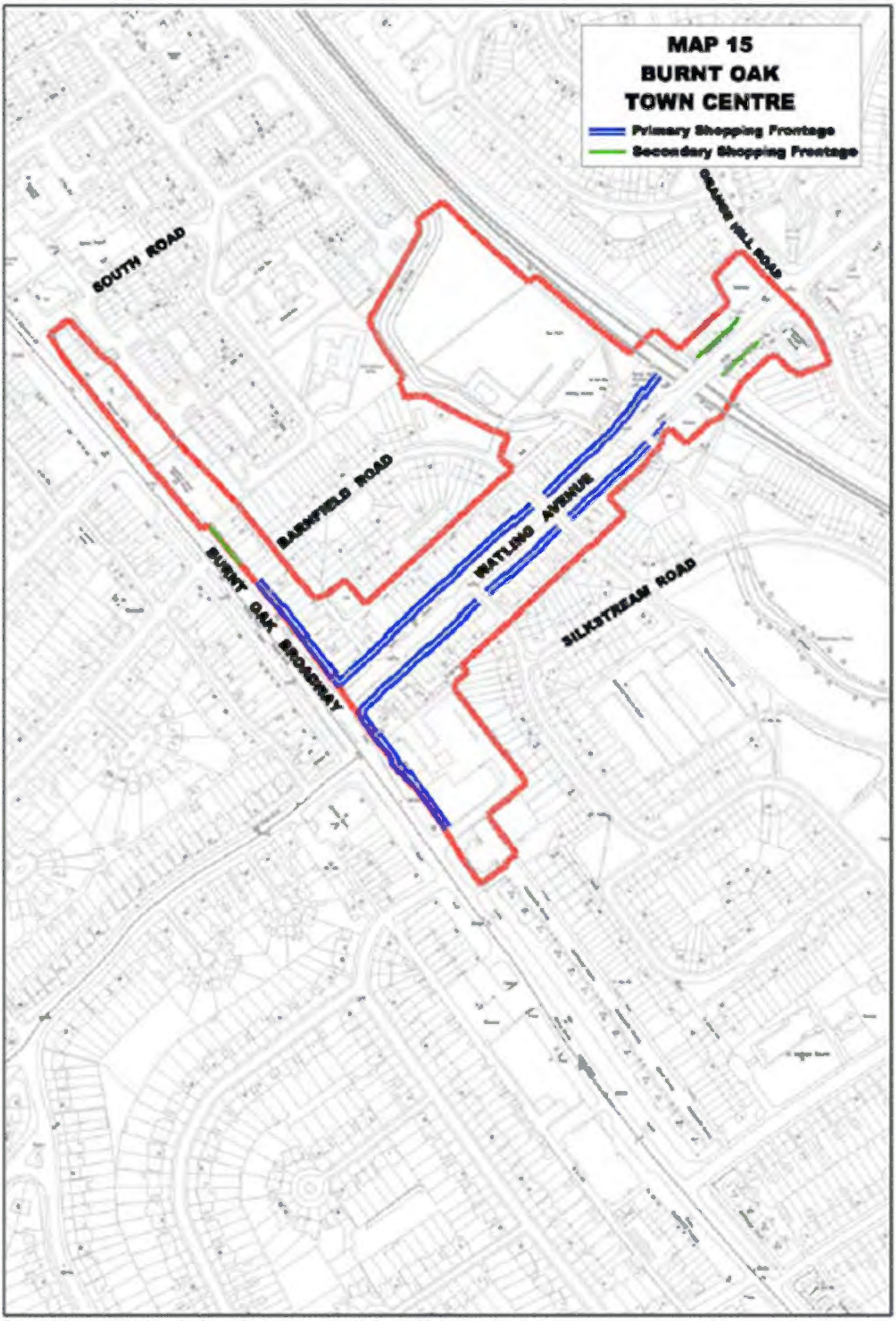
Of those that surveyed who used Burnt Oak, 54.55% noted that Burnt Oak could be improved through cleaner streets/removal of litter. 9.09% noted no improvements.



Retailer requirements

There are three current retailer requirements for Burnt Oak, ranging from 800sq.ft to 4,500 sq.ft. Retailers include national multiples Aldi and Brighthouse.

<table>
<tr><th colspan="3">Recommendations</th></tr>
<tr><td rowspan="2">Summary (SWOT)</td><td>Strengths
▪ Increasing asking rents demonstrating increasing demand for floor space;
▪ Multi-cultural population, and profusion of restaurants offering a variety of local cuisines;
▪ Declining vacancy rate;
▪ Strong footfall</td><td>Weaknesses
▪ Linear centre, which can lack coherence;
▪ Presence of multiple budget retailers which dominate the comparison offer
▪ Concentrations of takeaways and unhealthy service offer
▪ Poor quality of public realm in some areas (littering, neglected shop fronts, poor building quality);
▪ Severing effect of Burnt Oak Broadway</td></tr>
<tr><td>Opportunities
▪ Improve unit quality and retail offer through increasing asking rents;
▪ Establish a clear identify which differentiates Burnt Oak from nearby Edgware (major centre);
▪ Potential to attract custom from growing residential development in the locality.</td><td>Threats
▪ Competition from nearby Major Centre (Edgware) and Colindale as a consequence of proposed additional retail floorspace proposed through Area Action Plan;
▪ Inability to attract quality operators and national multiples due to poor quality building stock and poor public realm and higher levels of deprivation;
▪ Failure to compete with retail offer (including popular national multiple) at nearby Edgware;</td></tr>
<tr><td>Recommendation</td><td colspan="2">Moderate health
Overall the centre is performing moderately but there is a need qualitative improvements in terms of offer, health and environment.
Strengths include the reducing vacancy rate and increasing rents, and predominantly convenience and service-orientated offer. The level of convenience provision is well above the national average, bolstered by a varied independent offer of international grocers and specialised food stores. However, it is undermined by the poor quality of the offer: while the lower level of comparison retail provision compared to the UK average is due to the convenience and service role of the centre, what is there is dominated by budget retailers, many of which have very closely overlapping offers and meet only very localised needs. Burnt Oak Broadway is a busy main road and creates a severing effect with the rest of the centre. Notwithstanding this footfall is good. Public realm improvements will assist in improving the overall appearance of the centre; however, Burnt Oak presents a vibrant and busy environment throughout the day. There is potential for a retail-led scheme at Watling Avenue car park, subject to re-provision of the market.</td></tr>
</table>


MAP 15
BURNT OAK
TOWN CENTRE
Primary Shopping Frontage
Secondary Shopping Frontage
SOUTH ROAD
BARNFIELD ROAD
WATLING AVENUE
BURNT OAK BROADWAY
SILKSTREAM ROAD
GRANGE HILL ROAD

CHIPPING BARNET (DISTRICT CENTRE)	Date of survey: 05/05/17

Diversity of uses

Category	No. of units	% of units	UK %	Floorspace (sq.m)	Floorspace (%)	UK %
Convenience	19	8.0	9.41	5,550	14.6	18.34
Comparison	63	26.6	39.10	11,450	30.1	44.18
Services	132	55.7	38.17	19,000	50.0	25.84
Vacant	21	8.9	12.13	1,870	4.9	10.71
Other	2	0.8	1.19	160	0.4	0.97
Total	237	100	100	38,030	100	100

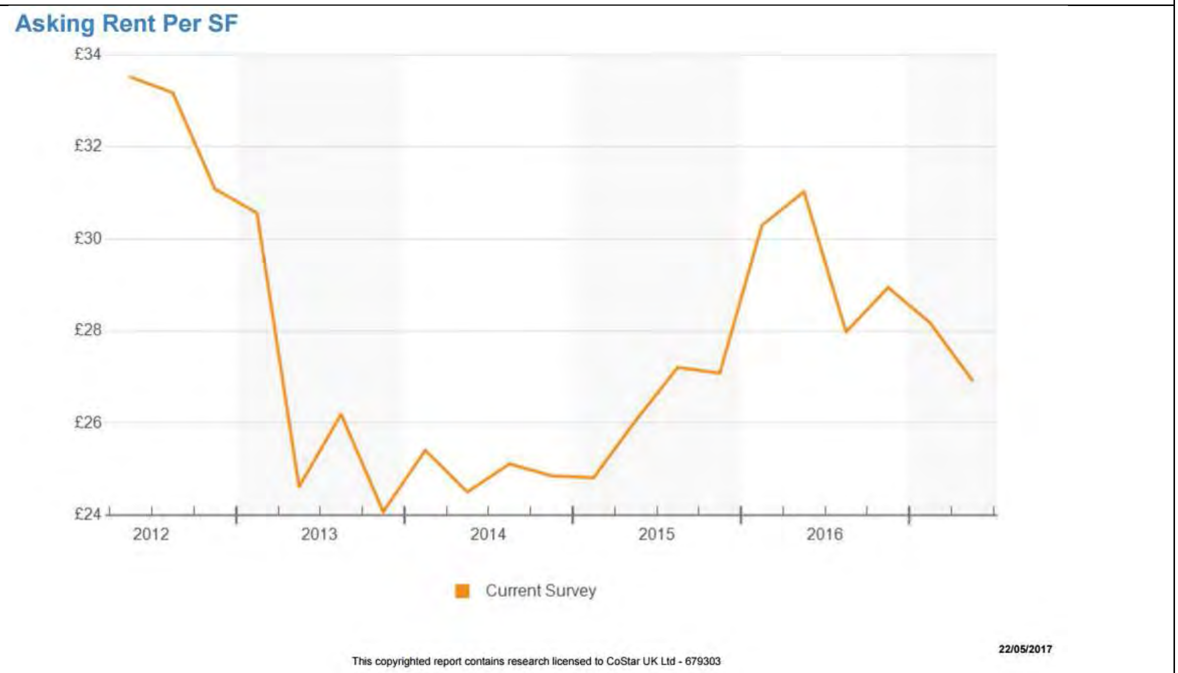
Source: GOAD and PBA

Diversity of uses & retailer representation

Foodstores	Chipping Barnet's convenience retail provision is centred on the 2,050 sq.m Waitrose store which anchors the Spires Shopping Centre (SSC). In addition, there are a number of smaller multiples convenience stores spread throughout the centre including Londis (210 sq.m gross), Tesco Express (320 sq.m gross), Iceland (730 sq.m gross), Sainsbury's Local (550 sq.m gross), and a Premier. This level of provision is broadly in line with the UK national average. There are relatively few independent convenience stores in the centre relative to other District centres in Barnet and the total number of convenience units has decreased by three since the last survey undertaken for the 2009 retail study.
National multiples	The centre has a strong representation from national multiples largely as a consequence of the SSC, which accommodates 14 comparison retail multiples including Waterstones, New Look, H&M, Carphone Warehouse, Roman and The Works. Further national comparison retailers are also present on High Street including Clarks, Holland and Barratt, and Robert Dyas. In addition, there is an eclectic mix of independent comparison retailers including furniture stores, DIY shops, independent fashion boutiques, a music shop, motor factors, picture framing shop and a flooring specialist. Despite this strong provision, the proportion of comparison retail within Chipping Barnet is below the UK average. However, this is largely due to the high level of service provision within the centre. The level of vacancies has increased from 11 identified in the previous retail study to 21 during our visit. However, there were no concentrations of vacancies in any one area, and there does appear to reasonable churn in the market to suggest vacancies will reduce over time.
Other retail uses & markets	The financial and professional sector is well represented with six banks (Santander, Natwest, Nationwide, TSB, HSBC and Barclays), various estate agents (including national chains Foxtons, Winkworth and Hunters) and a number of solicitors and financial advisers also present. Bookkeepers Paddy Power, Coral and Ladbrokes are also present within the centre. Barnet Market operates every Wednesday & Saturday at St Albans Road car park.
Evening economy	Multiple food and drink operators include Carluccios, Pizza Express and Prezzos, coffee houses Starbucks, Costa and Caffe Nero and hot food takeaway providers Dominos, McDonalds, KFC Papa Johns and Greggs. In addition, there are numerous independent cafes, restaurants, bars (including late night bars). Anytime fitness is a 24 hour gym and within the SSC and there is the Bull Theatre (and theatre school) on High Street. Additionally, the Everyman Barnet Cinema, whilst not within the centre is located approximately 1km to the south of the centre. We therefore consider that the evening economy is well established within Chipping Barnet.
Other services	The scale of Chipping Barnet also attracts a range of services including Barnet and Southgate college campus, Addington Medical Centre, Citizens Advice Bureau, Chipping Barnet library, St John the Baptist Church, Post Office and Barnet Police Station.

Accessibility

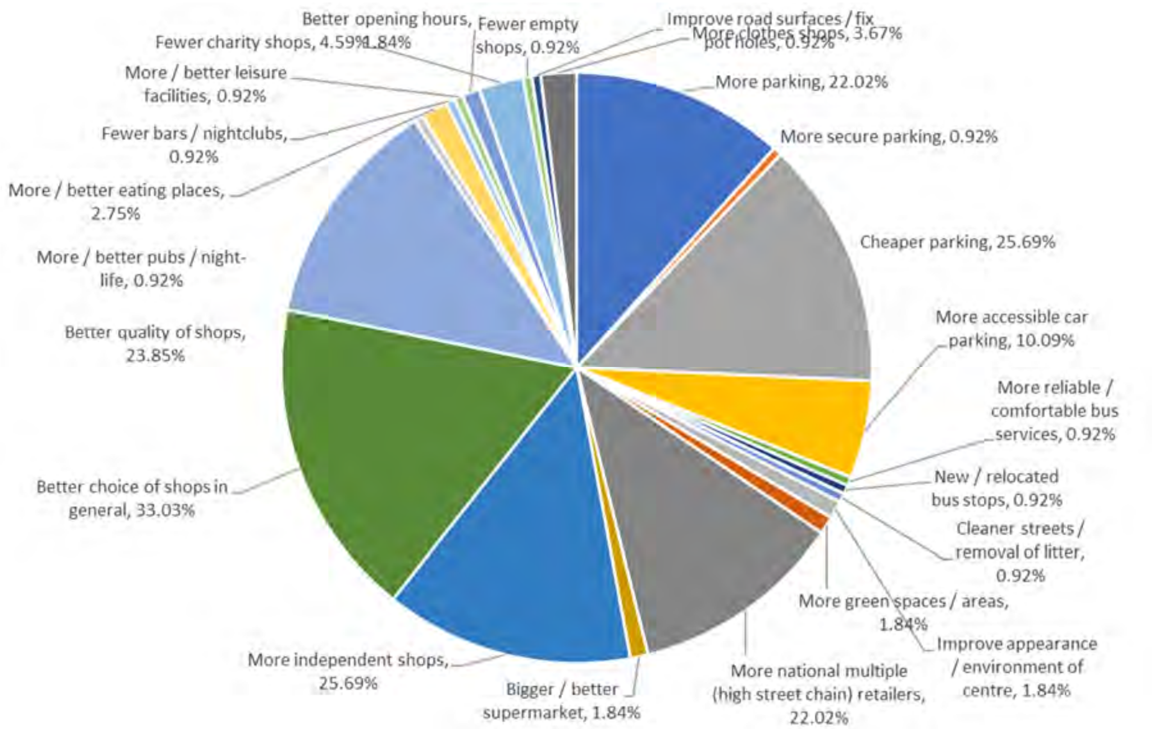
PTAL	The centre has excellent accessibility by public transport being served by the High Barnet tube station on the Northern Line which is 200m south of the southern end of the centre. Frequent bus services are also present to and from the centre including the following bus services: 34 (Walthamstow Central), 84, 107 (New Barnet), 184, (Turnpike Lane Station), 263 (Highbury and

	Islington), 307 (Brimsdown), 326 (Brent Cross) and 383 (Woodsie Park). The excellent public transport links are reflected in the PTAL rating which ranges from 5 (at the south of the High Street), 4 (in the centre) and 3 (at the north).
Car parking	High Barnet (155 spaces) (pay); Fitzjohn Avenue (89 spaces) (pay); The Spires (440 spaces) (pay); Stabylton Road (63 spaces) (pay).
Pedestrian linkages & disabled access	The centre is linear affording easy navigation of the pavements which are wide and in generally good condition. However some shops still required stepped access limiting accessibility. Whilst High Street is a busy road, numerous pedestrian crossing points are available.
Environmental quality	
Retail unit size & quality	Unit size is generally more varied than other District centres, reflecting the market town character of the centre with range of styles and buildings present, including small parades of shops. SSC is a purpose built shopping centre with larger floorplates to support multiple retailers arranged around inner courtyards. Recently larger floorplate stores have been created through the amalgamation of retail units to support multiple retailers. Building quality is moderate to high, particularly along the primary shopping frontages. Some units towards the south of the centre are poorer in quality, and could benefit from renovation and refurbishment.
Access to green space	There is attractive public space to the rear of the St John the Baptist church, including benches and areas of grass. In addition, Kings George's Fields lies approximately a 10-minute walk away to the east of the centre.
Townscape & street furniture	The built form of the centre is good with the interest created by the range of building styles and retail offer. However, there is a general lack of greenery along high street, though it is punctuated by some greenery adjacent to the college and St John's Baptist Church. Some hanging baskets are evident but could be more prevalent. During our visit there was some litter evident along High Street. Numerous cafes and bars provide interest and encourage dwell time in the centre.
Perception of safety & evidence of crime	There wasn't any evidence of anti-social behaviour or criminal activity during our visit and the perception of crime in the centre was low. High levels of natural surveillance were present due to the busy nature of the centre and the high levels of footfall.
Development opportunities & recent investment	**Development opportunities** • Territorial Army site St Albans Road. • Barnet market suggested for retail improvement. • Land to the rear of 120-204 High Street could enable expansion / reconfiguration of existing retail units to suit modern retailers. • Opportunity for some additional residential above retail units could be explored. **Recent investment** • Redevelopment of The Spires Shopping centre continues following completion of an initial phase.
Commercial yields	According to Co-Star, the five-year average yield for Chipping Barnet is 7.2% which is high compared to the borough district centre average of 5.5%. This high yield level reflects relatively weaker investor confidence in the area. However, average figures can mask the greater variations the yield levels achieved in individual transactions so should be treated with some care.
Commercial rents	

According to Co-Star, asking rents in Chipping Barnet have fluctuated between almost £34 and £24 per sq.ft over the past five years as shown in the graph. Asking rents declined sharply from around £32 to £24 per sq.ft between Q4 2012 and Q4 2013. Co-Star recorded four deals in Q4 2012 but only recorded one deal throughout the whole of 2013 which explains why centres average rent dropped dramatically in this period. The Chipping Barnet five-year average asking rent is £27.18 per sq.ft which compares favourably to the borough district centre five-year average of £24.42 per sq.ft. This suggests that the centre is one of the most attractive centres in the borough to operators but average rent figures should be treated with a degree of caution since they can mask greater variations recorded in individual transactions.

Customer views & behaviour

The household survey results for Chipping Barnet showed that 15.60% felt no improvements are needed. Of those that did not a need for improvement, the highest need was a 'better choice of shops in general'



Retailer requirements

There are no current retailer requirements published for Chipping Barnet.

Recommendations

Summary (SWOT)

Strengths
- Strong comparison retail offer;
- High levels of car parking attracting visitors from further neighbouring areas;
- Variety and breadth of offer;
- The Spires shopping centre provides a modern and well managed retail and leisure environment.

Weaknesses
- Busy road and traffic congestion;
- Poor townscape and provision of street furniture. Lack of space / opportunities for new street furniture;
- Significant number of vacant units in the centre (21).

Opportunities
- New footfall created as a result of additional retail and leisure floor space created within the SSC redevelopment;
- Critical mass of retail and leisure units to attract new operators to the centre.

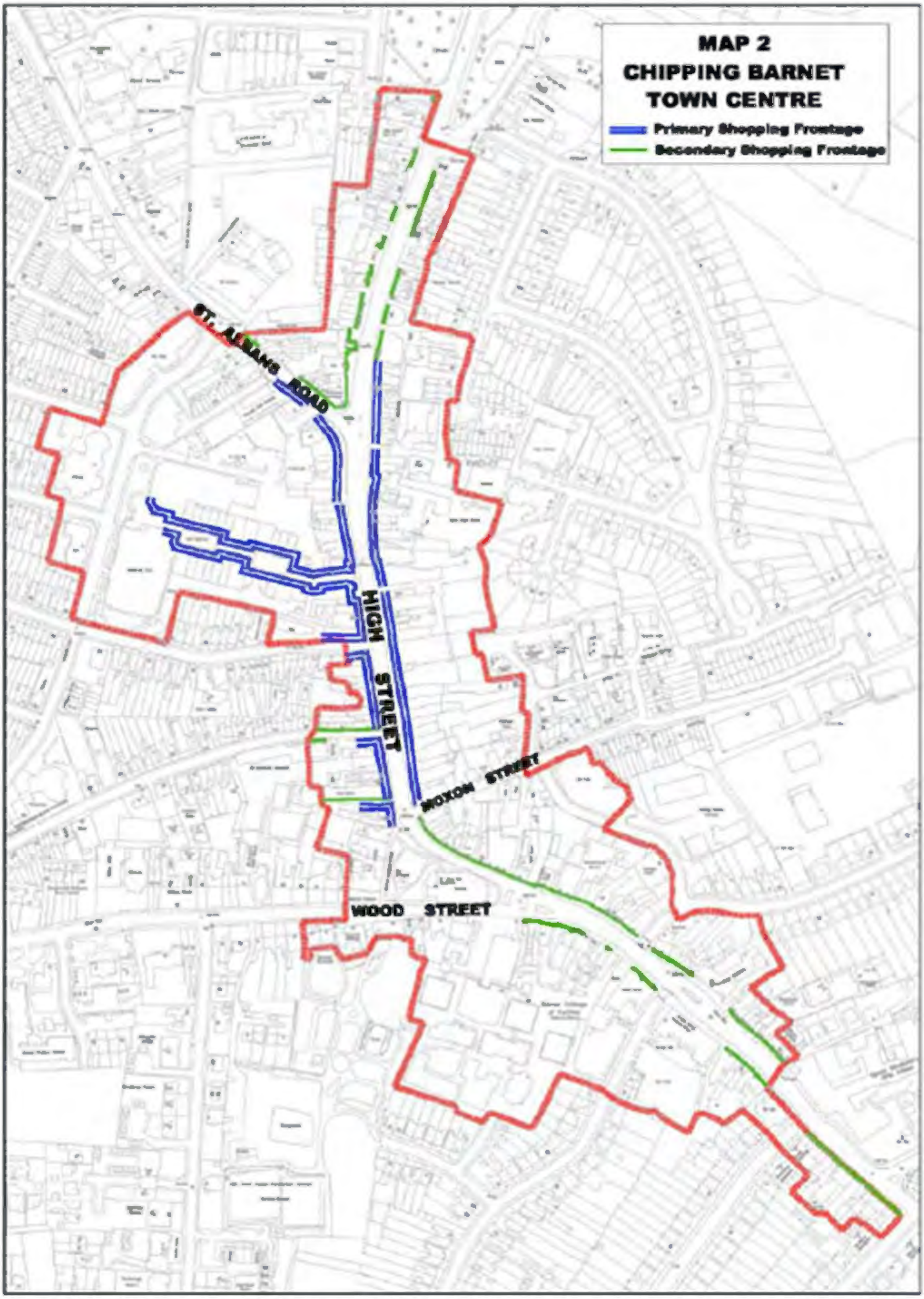
Threats
- Poor congestion jeopardising pedestrian experience;
- The Spires shopping centre risks pulling footfall away from the more southerly parts of the centre;
- Growing competition between nearby centres both within (e.g. New Barnet) and outside of the Borough (e.g. Borehamwood).

Recommendation

Good health

Overall the centre is performing well as evidenced by the breadth of multiple and independent retailers present. The range of financial and professional, food and drink outlets, and leisure provision also ensures a broad town centre offer within the centre attracting high levels of footfall. However, rising vacancy levels are a concern, albeit they are not concentrated in any particular area. Investment in the SSC also shows clear commercial interest, though recent falling rents

	requires monitored to see if it's a continuing trend. There are generally limited opportunities to expand the centre though there is potential for reconfiguration/ expansion of units to the east of High Street as well as potential redevelopment of the Stapylton Car park, though re-provision of the market and car parking would be required. Some public realm improvements would benefit the quality of the centre, though he scope for this is limited and the built form of the centre is already attractive. Overall the centre is vital and viable though regular monitoring of key indicators is advised to ensure the centre remains competitive and attractive.


MAP 2
CHIPPING BARNET
TOWN CENTRE
Primary Shopping Frontage
Secondary Shopping Frontage
ST. ALBANS ROAD
HIGH STREET
MOXON STREET
WOOD STREET

COLINDALE – THE HYDE (DISTRICT CENTRE)	Date of survey: 13/06/2017



Uses by category

Category	No. of units	% of units	UK %	Floorspace (sq.m)	Floorspace (%)
Convenien	19	8.0	9.41	5,550	14.6
Compariso	63	26.6	39.10	11,450	30.1
Services	132	55.7	38.17	19,000	50.0
Vacant	21	8.9	12.13	1,870	4.9
Other	2	0.8	1.19	160	0.4
Total	237	100.0	100	38,030	4,550

Source: GOAD and PBA. Note figures include all units with Colindale including those within LB Brent

Diversity of uses & retailer representation

Foodstores	Convenience provision is international in representation and forms a significant component of the centre well above the national average. Within the LB Barnet boundary there is Colindale Food Centre (70 sq.m gross), an Afghan supermarket (110 sq.m gross) and a newsagent. Within the wider centre there is also representation from Cost Cutter and as well a number of other local independent supermarkets including a Polish supermarket, Chinese supermarket and Eastern European supermarket.
National multiples	Due to the small unit size there are no multiple comparison retailers in the centre, nor are there any banks and building societies apart from the Post Office. Bookmakers William Hill, Coral, and Betfred are present as well national coffee chain Costa Coffee. The bulk of the provision are independent retailers including phone repair shops, a tool hire shop and a number of jewellers.
Other retail uses & markets	There are a limited number of professional service occupiers including an accountant, a number of local estate agents. A significant proportion of the shop units are taken up by cafes, restaurants, hot food takeaways. There are also a number of public houses present. No street market is present.
Evening economy	The centre is predominantly orientated to daytime activity, however the public houses, hot food takeaways and some local convenience stores have late opening times and therefore provide some evening activity.
Other services	There is a good variety of supporting services including a dentist, pharmacy, hair dressers, dry cleaners and beauty salons.

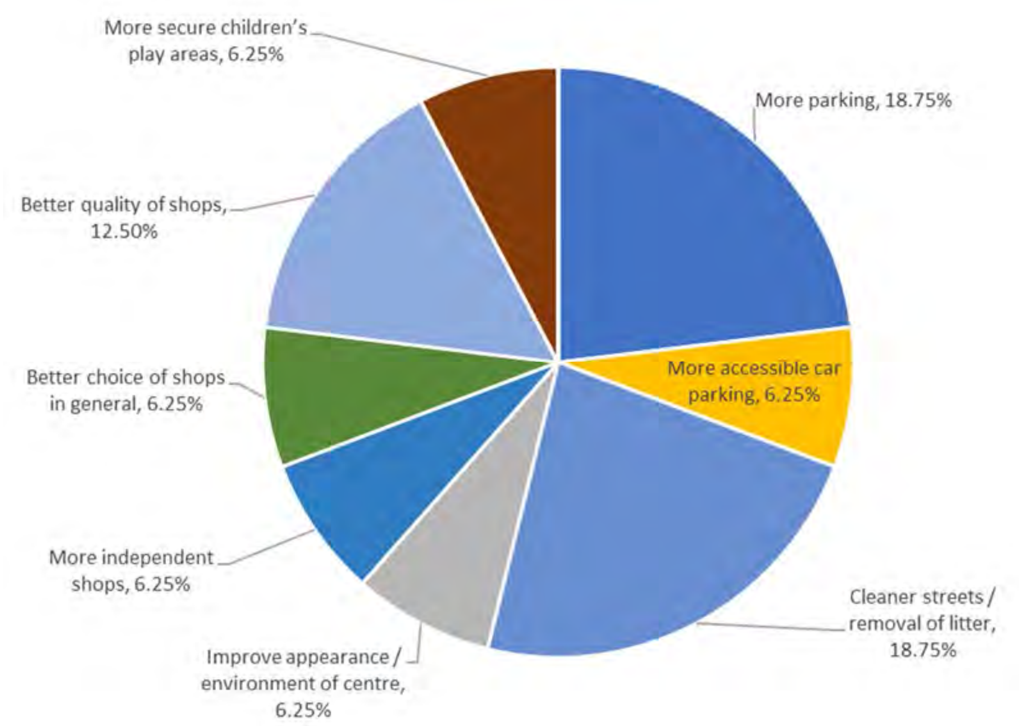
Accessibility

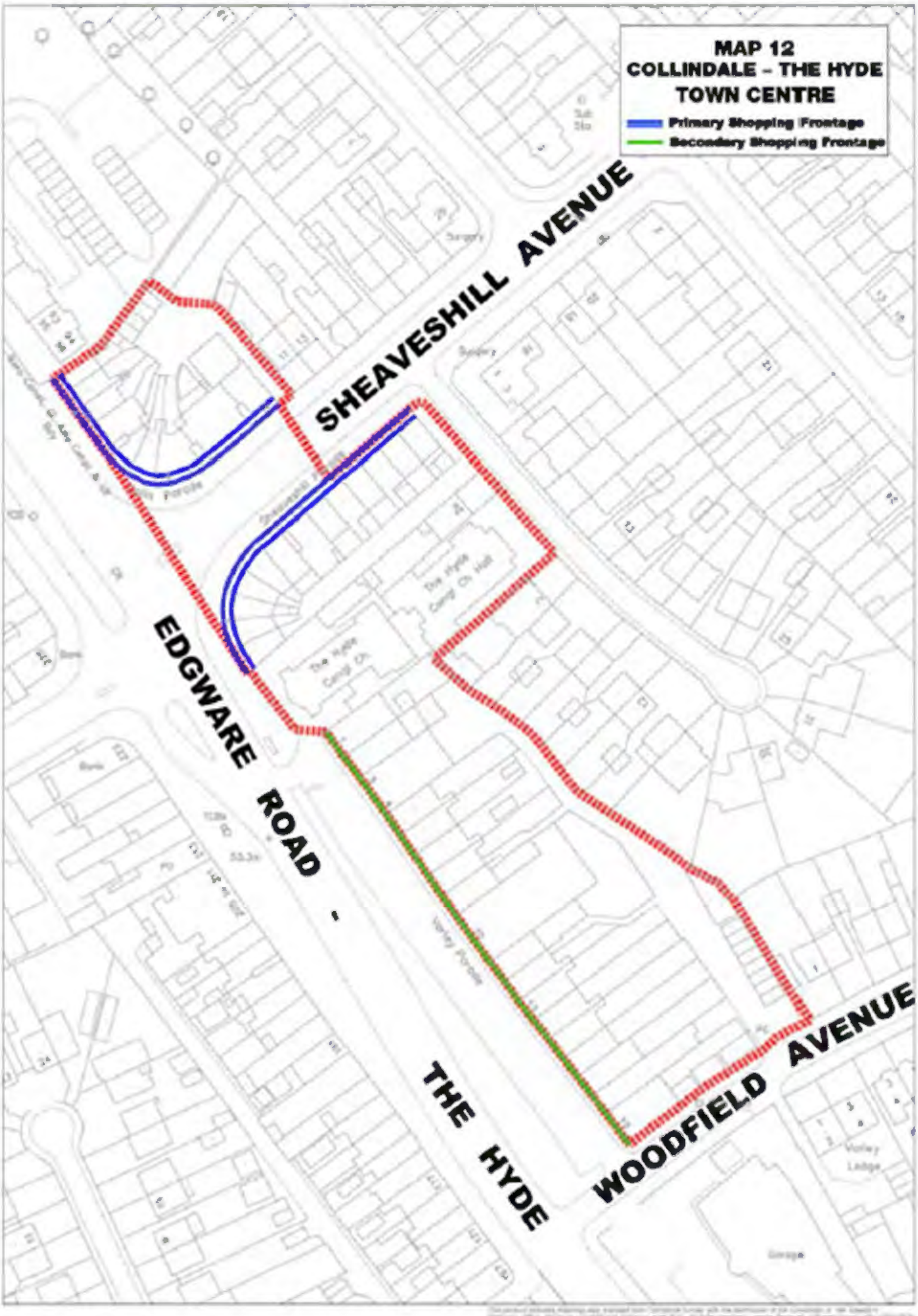
Public transport & PTAL	There are a number of bus services available including 32 (Edgware) and 142 (Watford Junction). Due to the absence of a tube station the PTAL rating is 2 / 3.
Car parking	On-street bay parking off Edgware Road & on Varley Parade.
Pedestrian linkages & disabled access	Edgware Road is busy road. However pedestrian crossings are frequent. Whilst pavements are wide, these are somewhat undermined by the haphazard parking on the islands separating Edgware Road from the off-street laybys adjacent to the shop units.

Environmental quality

Retail unit size & quality	Generally, very small units with only a limited about of medium sized units. Unit quality is generally moderate; however, some units are poor quality and would benefit from improvement.
Access to green space	Colindale Park (approx. 10 mins walk from the centre). Montrose Playing Field (approx. 15 mins walk from centre).
Townscape & street furniture	The centre provides a parade of regular small units which has more of a local centre feel. The quality of the townscape is mixed with vibrancy created from the range of international convenience stores, however there are also a large number of shuttered shopfronts which detracts from the centre. There is limited street furniture present with a number of bike ramps, benches, and limited areas of planting. Further greenery would enhance the centre, though management of car parking would need

	to be improved. Moderate littering was present during out visit despite litter bins being available.
Perception of safety & evidence of crime	No evidence of anti-social behaviour or crime was evident during our visit. Generally felt a safe environment.
Development opportunities & recent investment	Recent investment: - Residential development currently under construction ('Edition' – Fairview Homes) - Former Homebase site (residential-led) - Beaufort Park new residential development; Development opportunities: - Colindale Telephone Exchange
Commercial yields	According to Co-Star, the five-year average yield for Colindale is 4.6% which is somewhat lower than the borough district centre average of 5.5%. This lower yield indicates that investor confidence in Colindale is stronger than other centres in the borough. However, average figures can mask greater variations in the yield levels achieved in individual transactions so should be treated with some care.
Commercial rents	 According to Co-Star, asking rents in Colindale have decreased over the last five years. Asking rents peaked at around £24 per sq.ft in Q1 2013 and declined to just under £20 per sq.ft in Q4 2016. Rents stabilised for a period at around £23 between Q1 2014 and Q4 2015. Co-Star recorded just three deals in 2014 but only one deal in 2016 which explains why rents fell sharply in 2016. This trend of declining rental levels suggests that operator demand for space in Colindale has decreased in recent years. The Colindale five-year average asking rent is £ 22.65 per sq.ft which is lower than the borough district centre five-year average of £24.42 per sq.ft. However, average rent figures should be treated with a degree of caution since they can mask greater variations recorded in individual transactions.

<table>
<tr><td>Customer views & behaviour</td><td colspan="2">Of those that used Colindale (The Hyde), 43.75% noted no improvements. Cleaner Streets and more parking were the highest noted improvements.

</td></tr>
<tr><td>Retailer requirements</td><td colspan="2">There is one current retailer requirement for Colindale. This is for an Aldi Foodstore (from 4,500 sq.ft to 15,500 sq.ft).</td></tr>
<tr><td colspan="3">Recommendations</td></tr>
<tr><td rowspan="2">Summary (SWOT)</td><td>Strengths
▪ Multi-cultural population, and profusion of restaurants offering a variety of local cuisines;
▪ Strong convenience store provision;
▪ Recent investment in the area (i.e. residential development)</td><td>Weaknesses
▪ High provision of hot-food takeaways;
▪ Long street, which lacks a clear and coherent centre;
▪ Poor quality of public realm in some areas (littering, neglected shop fronts, poor building quality, chaotic car parking)</td></tr>
<tr><td>Opportunities
▪ Enhance the streetscape by improving the appearance of some buildings and units;
▪ Attract new retailers and increase footfall (likely affluent) arising from new residential development;
▪ Better controls over car parking.</td><td>Threats
▪ Loss of footfall to Colindale Retail Park to the north-west of the centre;
▪ Proximity to other centres;
▪ Falling rents indicating falling demand, resulting in failure to failure to attract national multiples and quality independent retailers;
▪ Failure to attract new footfall due to poor public realm and quality of operators.</td></tr>
<tr><td>Recommendation</td><td colspan="2">Underperforming.
The centre is heavily orientated to convenience and service provision and has more of a local centre appearance. However, the international offer of the centre does add vibrancy but is limited in terms of comparison and financial service provision, leading to people needing to travel to a different centre to meet their everyday needs. The centre would benefit from public realm improvements and better management of car parking to be more attractive. Declining rents are a concern, though they appear to have now stabilised. Overall the centre has declining vitality and viability owing to the limited mix of uses present and the presence of out of town retail provision within close proximity. We consider that the centre now more accurately functions at the level of a local centre and therefore recommend that LBB re-designate the centre when reviewing retail planning policy. This will need to be discussed with LB Brent.</td></tr>
</table>


MAP 12
COLLINDALE – THE HYDE
TOWN CENTRE
Primary Shopping Frontage
Secondary Shopping Frontage
SHEAVESHILL AVENUE
EDGWARE ROAD
THE HYDE
WOODFIELD AVENUE

CRICKLEWOOD (DISTRICT CENTRE)	Date of survey: 13/06/2017


Uses by category

Category	No. of units	% of units	UK %	Floorspace (sq. m)	Floorspace (%)	UK %
Convenience	12	18.8	9.41	1,900	21.7	18.34
Comparison	13	20.3	39.10	2,310	26.4	44.18
Services	37	57.8	38.17	4,200	47.9	25.84
Vacant	2	3.1	12.13	350	4.0	10.71
Other	0	0.0	1.19	0	0.0	0.97
Total	64	100.0	100	8,760	100.0	100

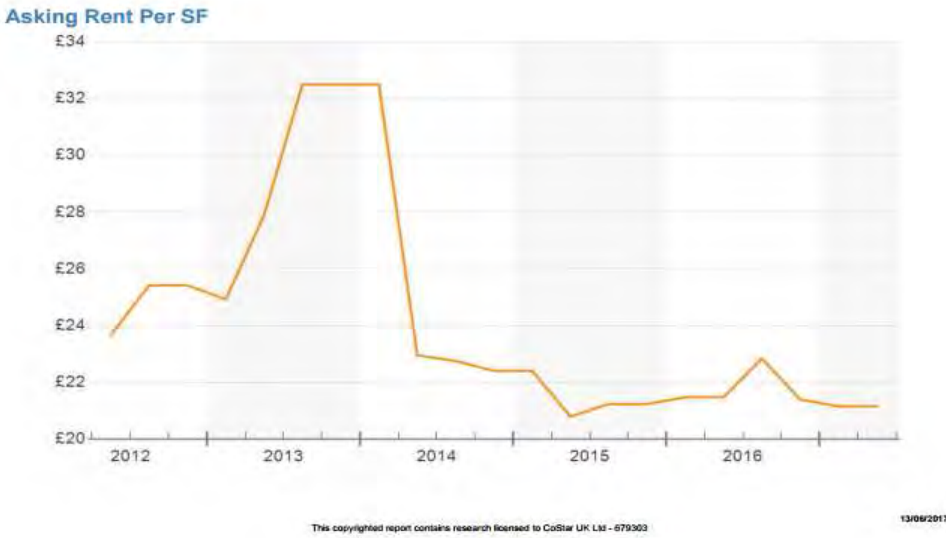
Source: GOAD and PBA research

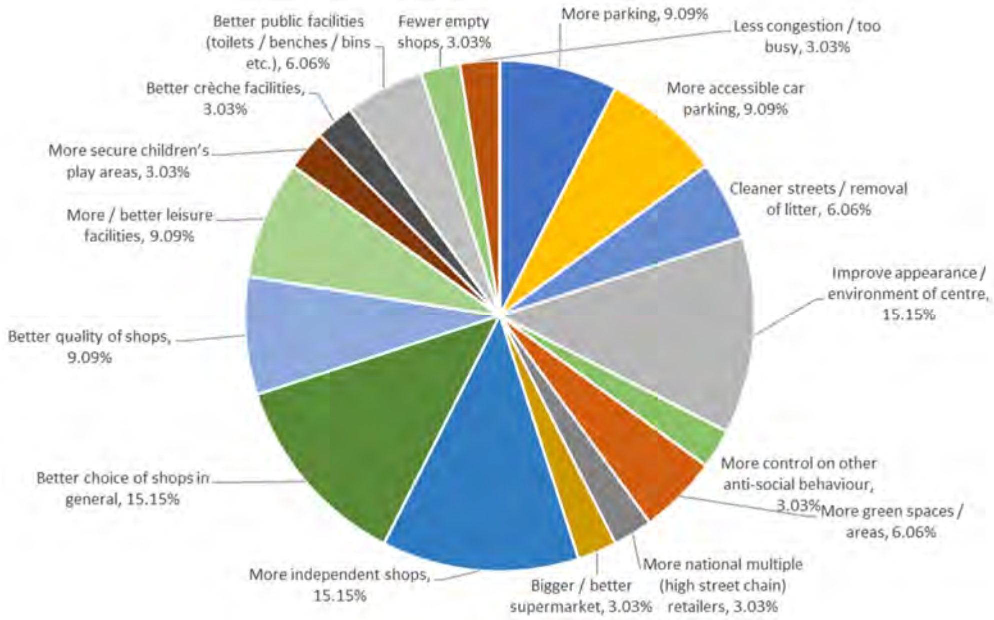
Diversity of uses & retailer representation

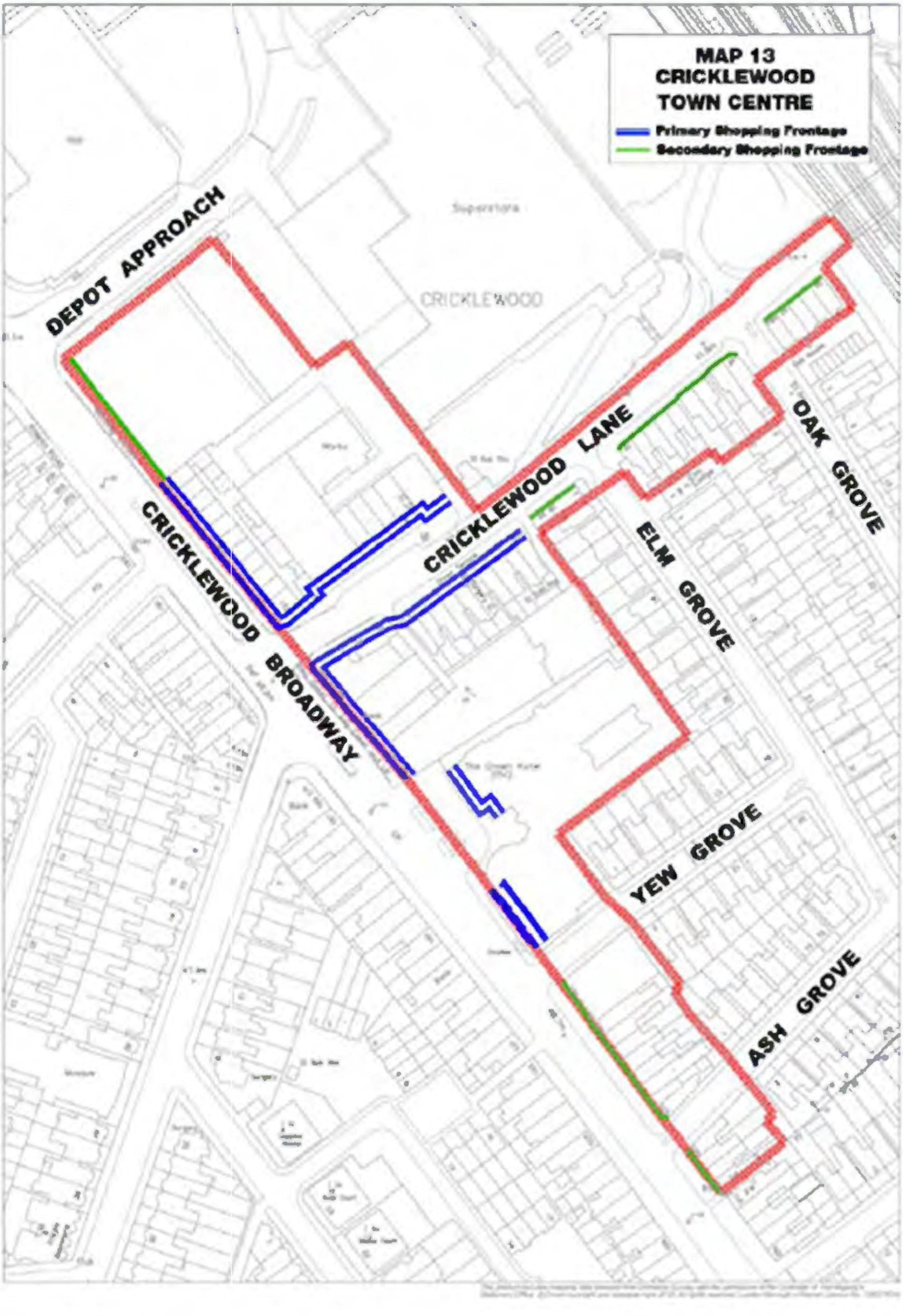
Foodstores	The Co-operative (850 sq.m gross) is the main foodstore in Cricklewood and is located toward the eastern edge of the town centre, along Cricklewood lane. An Iceland is located centrally along the primary frontage on Cricklewood Broadway. Other convenience stores in the centre take the form of independent foodstores (including green grocers and butchers) and newsagents. Overall the level of convenience provision in Cricklewood is higher than the UK average.
National multiples	There is a limited representation from multiple comparison operators in Cricklewood which is well below the UK average. Current provision comprises national multiples food and drink operators such as McDonalds and KFC as well as Snappysnaps. B&Q and Jewson are located just outside of the centre; the former identified within a potential area of opportunity, Aside from multiples, there is also limited independent comparison provision in Cricklewood.
Other retail uses & markets	There are a number of independent café and restaurant, bars and hot food takeaways present in Cricklewood. Banks currently represented in Cricklewood are Santander, Nationwide and Barclays; although it should be noted that these are located within neighbouring LB Brent. The Natwest at the junction of Chichele Road and Cricklewood closed in October 2015.
Evening Economy	Evening economy uses in Cricklewood include the restaurants, public houses, bars and hot food takeaways. There is also the Clayton Crown Hotel located centrally and a Travelodge hotel located to the north of centre. Cricklewood does not have a cinema or bowling alley.
Other services	Retail services are well represented with a small number of independent hairdressers and beauty salons~~,~~ Post Office (falling within LB Brent area), pharmacy's, opticians, and funeral directors. Taken as a whole service provision in Cricklewood is significantly higher than the UK average.

Accessibility

Public transport & PTAL	Cricklewood train station is located 200m north of the centre, along Cricklewood Lane. There are also numerous frequent bus services along Cricklewood Broadway including routes16, 32, 245, 266, 216, 332, 632 and N16 to/from Victoria, Golders Green, Hammersmith, White City, Kilburn Park and Paddington. The centre has a rating of PTAL 5 / 6a.
Car parking	Broadway Parade (87 Spaces, Free), Travelodge Cricklewood (Pay), Broadway Retail Park (590 spaces, Pay, Customers Only)
Pedestrian linkages & disabled access	Cricklewood benefits from wide, flagged pavements in parts, which provide respite from the busy Cricklewood Broadway. This, in combination with standard urban pavement widths allows unfettered pedestrian movement around the centre, in light of its linear nature. Pedestrian crossings are provided at key junctions along Cricklewood Broadway, all with accessible dropped kerbs and most with refuge areas. Most shops and businesses along High Road are able to achieve level access for wheelchair users, however a number still retain a stepped access

Environmental quality	
Retail unit size & quality	The majority of retail units are small, reflecting the traditional linear character of the District Centre. The Co-operative is the largest unit within the centre. The shop frontages are of generally reasonable quality and are on the whole well maintained. This is assisted by a number of cafes being present which utilise the pavement area. Unit quality throughout the centre is generally good, however, some could benefit from restoration/ maintenance. Indeed, Cricklewood has the highest proportion of takeaway stores within LBB at 17%, which can detract from the streetscene in the daytime when these are not in operation.
Access to green space	Malesbury Dell Park (approx. 450m south-west of centre); Gladstone Park (approx. 13 mins walk from centre). Cricklewood Pocket Park off Kara Way is also available approximately 150m north of the centre.
Townscape & street furniture	Good. Attractive shopping parades and partially lined with trees. Some outside seating on pavements. Street furniture such as benches could be more prevalent. Plenty of litter bins. Some littering but generally clean. Large billboards at junction of Ashford Road & Cricklewood Broadway are a poor contribution to the public realm. Trees line the centre and/or east side of Cricklewood Broadway, which is a positive contribution.
Perception of safety & evidence of crime	No evidence of anti-social behaviour or crime was observed during our visit. Good natural surveillance from busy High Road, together with wide pavement reduces the perception that crime will occur.
Development opportunities & recent investment	**Development opportunities:** - Vacant site at junction of Depot Approach & Cricklewood Broadway, though B&Q continues to trade currently. - Cricklewood lane mixed use planning application. **Recent / likely future investment:** - Recent redevelopment of BP Garage for ground floor retail and residential upper floors; - Recently developed Travelodge; - £1.7m grant from the Outer London Fund to improve the environment and streetscape of the centre with new or improved public realm, street furniture and shopfronts (now spent).
Commercial yields	According to Co-Star, the average yield for Cricklewood for the past year was 4.7% which is slightly lower than the five-year (2012-2017) borough district centre average of 5.5%. This low yield level indicates strong investor confidence in the area. However, average figures can mask the greater variations the yield levels achieved in individual transactions so should be treated with some care.
Commercial rents	 According to Co-Star, asking rents in Cricklewood have fluctuated between £32 and £21 per sqft over the past five years as shown in the graph. Average asking rents peaked in Q3/Q4 2013 at £32 per sqft and then fell to just £20 per sqft in Q2 2016. The Cricklewood five-year average asking rent is £23.08 per sqft which is slightly lower than the borough district centre five-year average of £24.42 per sqft. The falling rental values trend suggests that commercial operator demand for space in the centre; however, average rent figures should be treated with a degree of caution since they can mask greater variations recorded in individual transactions.

<table>
<tr><td>Customer views & behaviour</td><td colspan="2">Of those that used Cricklewood, 36.36% noted no improvements. Of those that did state improvements, a ‘better choice of shops in general’, ‘more independent shops’, and ‘improve the appearance/environment of the centre’ were noted.

</td></tr>
<tr><td>Retailer requirements</td><td colspan="2">There are no current retailer requirements for Cricklewood. However, not all retailers publish their requirements and therefore there could be a hidden latent demand.</td></tr>
<tr><td colspan="3">Recommendations</td></tr>
<tr><td rowspan="2">Summary (SWOT)</td><td>Strengths
▪ Multi-cultural population, and profusion of restaurants across the wider centre, offering a variety of local cuisines.
▪ Good public transport accessibility.
▪ Comparatively low vacancy rate.
▪ Attractive shopping parades</td><td>Weaknesses
▪ Comparatively poor comparison shopping offer compared to other centres.
▪ Falling asking rents demonstrate falling demand for retail floor space in the centre.
▪ Long street with a lack of clear and coherent centre.
▪ Divided between three boroughs and therefore potential barrier to a consistent approach.</td></tr>
<tr><td>Opportunities
▪ Enhance the streetscape by improving the appearance of some buildings and units;
▪ Redevelopment of vacant site at junction of Depot Approach & Cricklewood Broadway to provide investment and improve streetscape at road junction</td><td>Threats
▪ Loss of footfall to Broadway Retail Park and nearby superstores (Lidl, Wickes, Matalan);
▪ Failure to attract footfall to peripheries of the centre, leading to declining quality of retail provision and quality of public realm;</td></tr>
<tr><td>Recommendation</td><td colspan="2">Good health
Overall the centre is performing well due to the relatively higher quality convenience provision, good quality – though limited – independent comparison retailers and the high level of cafes and restaurants in the wider centre. The latter help to maintain across the centre as a whole which is complemented by the attractive shopping parades, despite heavy traffic volumes. Vacancies are well below the national average. The redevelopment of the B&Q site and adjoining vacant/ derelict land will provide a much needed boost to the centre, and should ideally provide a mixture of residential and retail uses. Overall the centre is vital and viable, however should the centre not be able to expand and improve its retail provision, there is a longer term risk of the status of the centre diminishing relative to others over time.</td></tr>
</table>



MAP 13
CRICKLEWOOD
TOWN CENTRE
Primary Shopping Frontage
Secondary Shopping Frontage
DEPOT APPROACH
CRICKLEWOOD BROADWAY
CRICKLEWOOD LANE
ELM GROVE
OAK GROVE
YEW GROVE
ASH GROVE
CRICKLEWOOD

EAST FINCHLEY (DISTRICT CENTRE) — Date of survey: 11/05/17

Uses by category

Category	No. of units	% of units	UK %	Floorspace (sqm)	Floorspace (%)	UK %
Convenience	14	12.7	9.41	2,890	16.2	18.34
Comparison	30	27.3	39.10	4,650	26.0	44.18
Services	63	57.3	38.17	9,750	54.6	25.84
Vacant	92	1.8	12.13	410	2.3	10.71
Other	1	0.9	1.19	170	1.0	0.97
Total	110	100	100	17,870	100	100

Source: GOAD and PBA

Diversity of uses & retailer representation

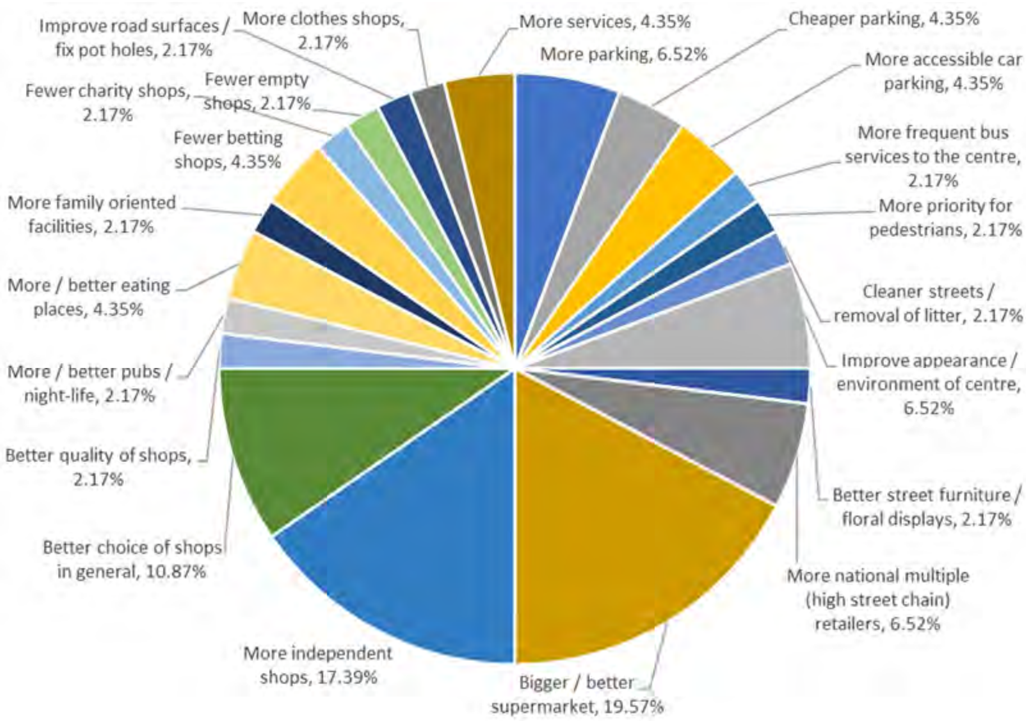
Foodstores	Budgens (720 sq.m), Iceland (490 sq.m), East Finchley Supermarket, various delicatessens, fishmongers, butchers and bakers
National multiples	Costa, Santander, NatWest, Domino's, Pizza Hut, Ladbrokes, Coral, William Hill, Caffé Nero, KFC
Other retail uses & markets	Comparison: while below national average, there is a wide ranging independent retail offer catering local needs, including clothing and footwear, DIY/homewares and household goods, chemists, several charity shops, florists, pet shops etc. occupying predominantly small units. No permanent market but occasional French market.
Evening economy	Phoenix Cinema and Finchley Youth Theatre provide the main leisure offer in the centre. This is supported by a wide range of pubs, cafes, takeaways and restaurants.
Other services	Financial services: two banks (Santander and NatWest) Other uses include dry cleaners, several betting shops, opticians, estate agents, hairdressers and beauty salons Community uses include doctors' surgery and public library.

Accessibility

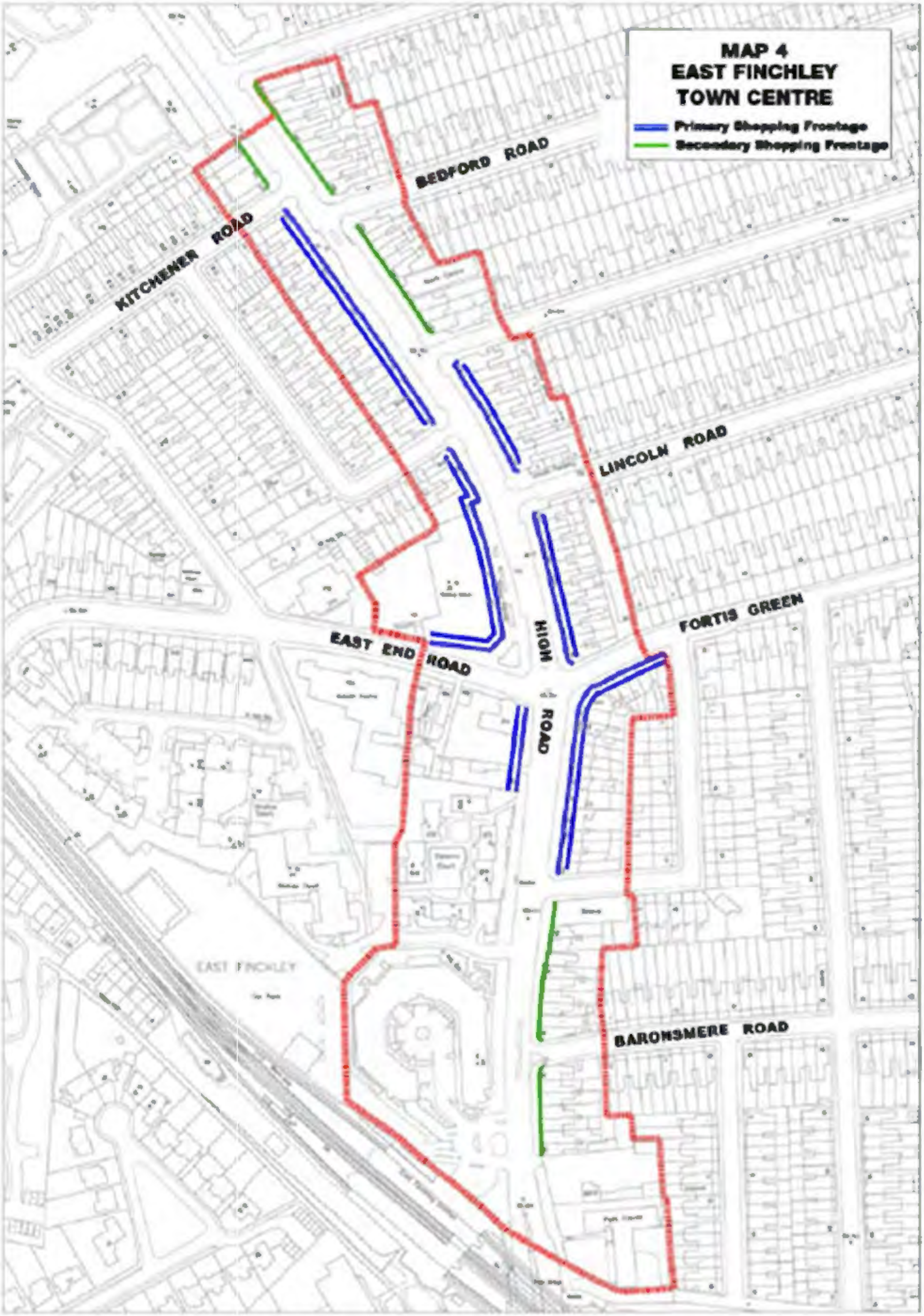
Public transport & PTAL	3-4
Car parking	East Finchley station (267 spaces) (pay).
Pedestrian linkages & disabled access	The centre has wide pavements. Road is quite busy; however, there are multiple pedestrian crossings. Some retail units have step only access.

Environmental quality

Retail unit size & quality	Mostly smaller unit sizes, interspersed with some larger units. Building quality is generally good / very good.
Access to green space	Cherry Tree Recreation Ground (approximately 5 minutes' walk from centre)
Townscape & street furniture	Very good. Plenty of street planting and street furniture. Street is lined with well-maintained trees. Some cafes / restaurants have outside seating areas which provides a positive contribution to the public realm.
Perception of safety & evidence of crime	Very good. No evidence of anti-social behaviour or criminal activity. Minimal littering.
Development opportunities & recent investment	Development opportunities: • None Recent investment: • Refurbishment of Park, House, High Road

Commercial yields	Co-Star does not provide yield data for East Finchley because there are relatively few deals available for the centre.
Commercial rents	 According to Co-Star, asking rents in East Finchley have increased over the last five years from around £17 per sqft in Q1 2012 up to £22 per sqft in Q2 2017 and peaked in Q4 2016 at £24 per sqft. In Q1 2016 CoStar recorded a high value deal – Unit 79 High Road was leased to Café Nero at £28 per sqft The East Finchley five-year average asking rent is £ £20.10 per sqft which is lower than the borough district centre five-year average of £24.42 per sqft. This suggests that East Finchley is less attractive to occupiers than other centres in the borough. However, average rent figures should be treated with a degree of caution since they can mask greater variations recorded in individual transactions. Rental values have increased in recent years which indicates that East Finchley is becoming increasingly attractive to occupiers as evidenced by the recent letting to national multiple Caffé Nero.
Customer views & behaviour	28.26% noted no improvements. Of those that did note improvements, a bigger/better supermarket was the most common statement. 
Retailer requirements	The only listed retailer requirement for a Caffe Nero has now been satisfied.

Recommendations		
Summary (SWOT)	**Strengths** ▪ High quality public realm; ▪ Quality of existing building stock; ▪ Low vacancy rate; ▪ Good cultural and leisure and restaurant / café offer; ▪ Proximity to London Underground station.	**Weaknesses** ▪ Comparison retail offer is moderate / poor and could be enhanced; ▪ Relatively limited presence of national multiple retailers. ▪ Above average number of betting shops and charity shops for a centre of this scale. ▪ Limited footfall at periphery of the centre due to length of frontages, including large portions of secondary frontage;
	Opportunities ▪ Opportunity to improve comparison offer to increase footfall; ▪ Establish standing as location of quality independent operators to increase footfall;	**Threats** ▪ Proximity to other centres (e.g. Finchley Church End) which has greater provision of national multiples is likely to limit East Finchley's role.
Recommendation	**Good health** The centre is vital and viable: there are low vacancies and there is a strong retail offer, both in convenience and comparison terms so it is performing to its role as a district centre, despite its smaller scale. In addition, the evening economy is anchored by a cinema and youth theatre, as well as a wide range of restaurants and takeaways. The northern end of the centre is some distance from the tube station as a footfall driver so may merit from review of the designated frontages to concentrate activity.	


MAP 4
EAST FINCHLEY
TOWN CENTRE
Primary Shopping Frontage
Secondary Shopping Frontage
BEDFORD ROAD
KITCHENER ROAD
LINCOLN ROAD
FORTIS GREEN
EAST END ROAD
HIGH ROAD
BARONSMERE ROAD
EAST FINCHLEY

FINCHLEY CHURCH END (DISTRICT CENTRE)	Date of survey: 31/05/2017

Uses by category

Category	No. of units	% of units	UK %	Floorspace (sq.m)	Floorspace (%)	UK %
Convenience	23	11.0	9.41	6,880	23.8	18.34
Comparison	33	15.8	39.10	4,410	15.3	44.18
Services	141	67.5	38.17	16,750	58.0	25.84
Vacant	11	5.3	12.13	840	2.9	10.71
Other	1	0.5	1.19	0	0.0	0.97
Total	209	100.0	100	28,880	100.0	100

Source: GOAD and PBA

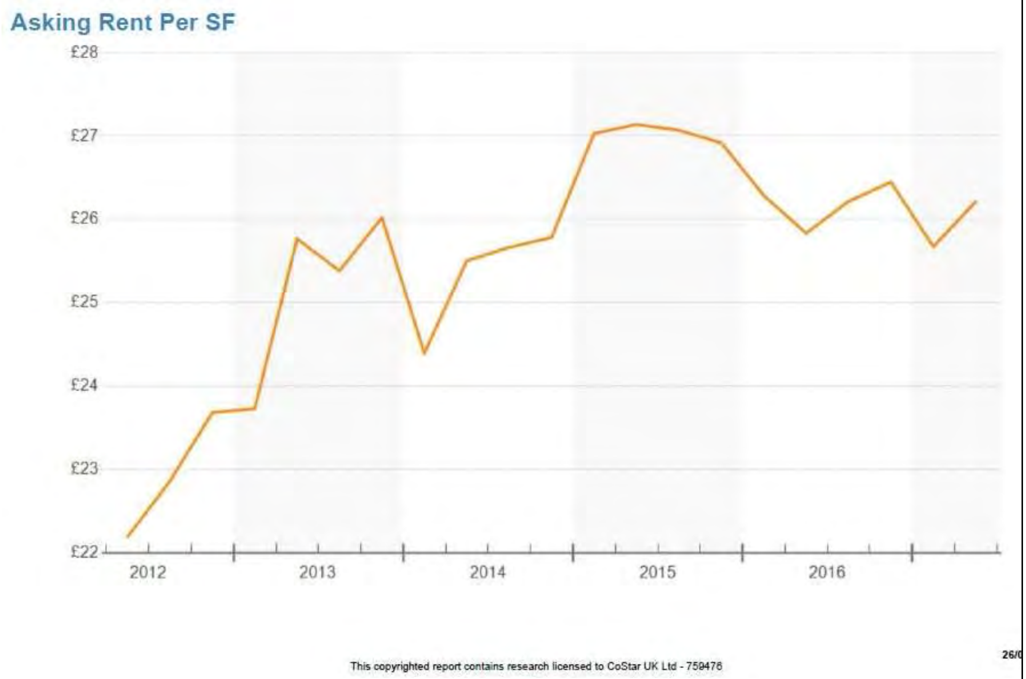
Diversity of uses & retailer representation

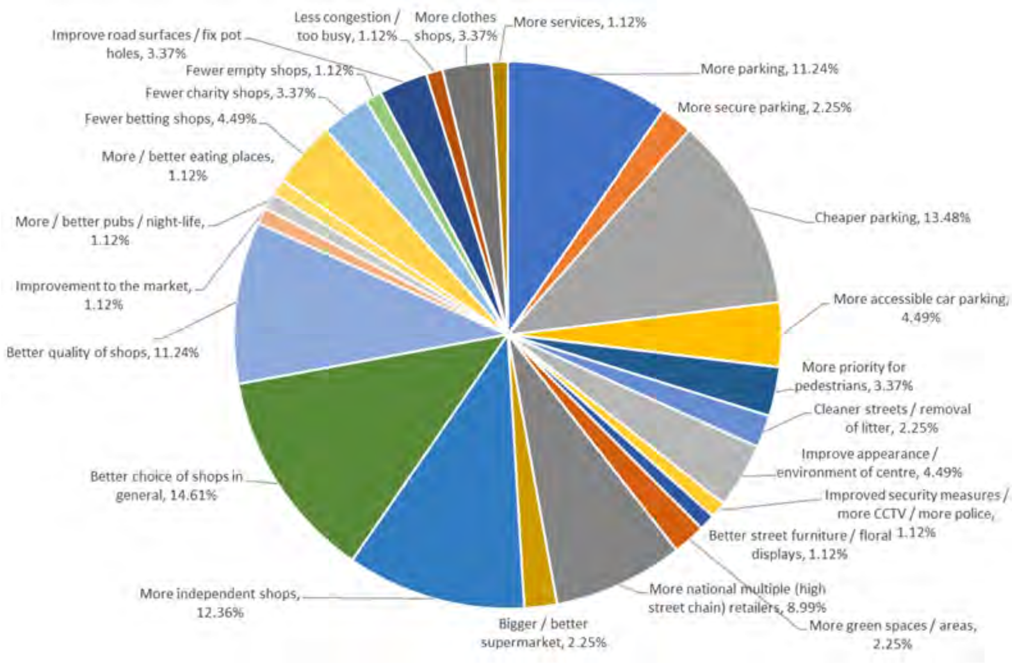
Foodstores	Finchley Church End has convenience retail provision broadly similar to the national average. The main multiple convenience retailer is a Tesco supermarket (3,880 sq.m gross) although there are also Sainsbury's Local, McColls and Best One stores present. In addition, there are a number of independent convenience retailers including Finchley xpress, halal butchers, green grocers, specialist bakers.
National multiples	There is a limited representation from multiple comparison operators which currently comprises Superdrug and Dreams. In addition, there are numerous national charity shops present including Age UK, Cancer Research, Sue Ryder and the British Heart Foundation. The rest of the comparison provision is independent and includes two DIY stores, a mobile phone shop, games resellers, stationers, glass merchants, a carpet shop and UPVC window sellers. Despite this independent provision the level of comparison provision is well below the national average (15.8% by unit compared to 39.1%). There is potential to increase the level of comparison floorspace if potential development opportunities are taken forward.
Other retail uses & markets	Financial and professional representation in the centre is good with the presence of national banks Barclays, Santander, NatWest, and Halifax. Other multiples include café chains (Costa); bookmakers (Paddy Power, William Hill, Betfred, Coral and Ladbrokes); hot food takeaways (Subway, KFC and Greggs); and pawnbrokers (the Money Shop and Cash Converters). Service provision in the centre is particularly strong and is more than double the UK average as a proportion of total floorspace. Other retail units include pharmacy, convenience store, money exchange, dry cleaner, homeware stores. King Edward Hall, a former banqueting hall has been vacant for a number of years despite retail units operating at the ground floor level.
Evening economy	Finchley Church End has limited evening activity due to its role as a service centre for primarily everyday items and daytime services, together with its excellent transport links to Central London and the wider GLA where more leisure activities are focused. As a consequence, the centre has relatively few bars and public houses as well as no local theatres or cinemas. Nevertheless, there are a substantial range of restaurants and hot food takeaways which provide some night-time activity. In particular, these are concentrated around the ground floor units associated with Winston House and Gateway House including the Travelodge hotel.
Other services	There is a number of substantial office blocks within the centre, providing an active working population generating associated spend within the town centre. There is also a library, Post Office, a number of churches of varying denominations.

Accessibility

Public transport & PTAL	The centre has excellent accessibility by public transport being directly served by the Finchley Central tube station on the Northern line. Frequent bus services are also present to and from the centre including the following bus services: 125 (Winchmore Hill), 13 and 460 (North Finchley/ Victoria), 143, (Brent Cross), 292 (Borehamwood), 302 (Mill Hill Broadway. The excellent public transport links are reflected in the PTAL rating which ranging from PTAL 4, 5 & 6a based on proximity to the tube station.

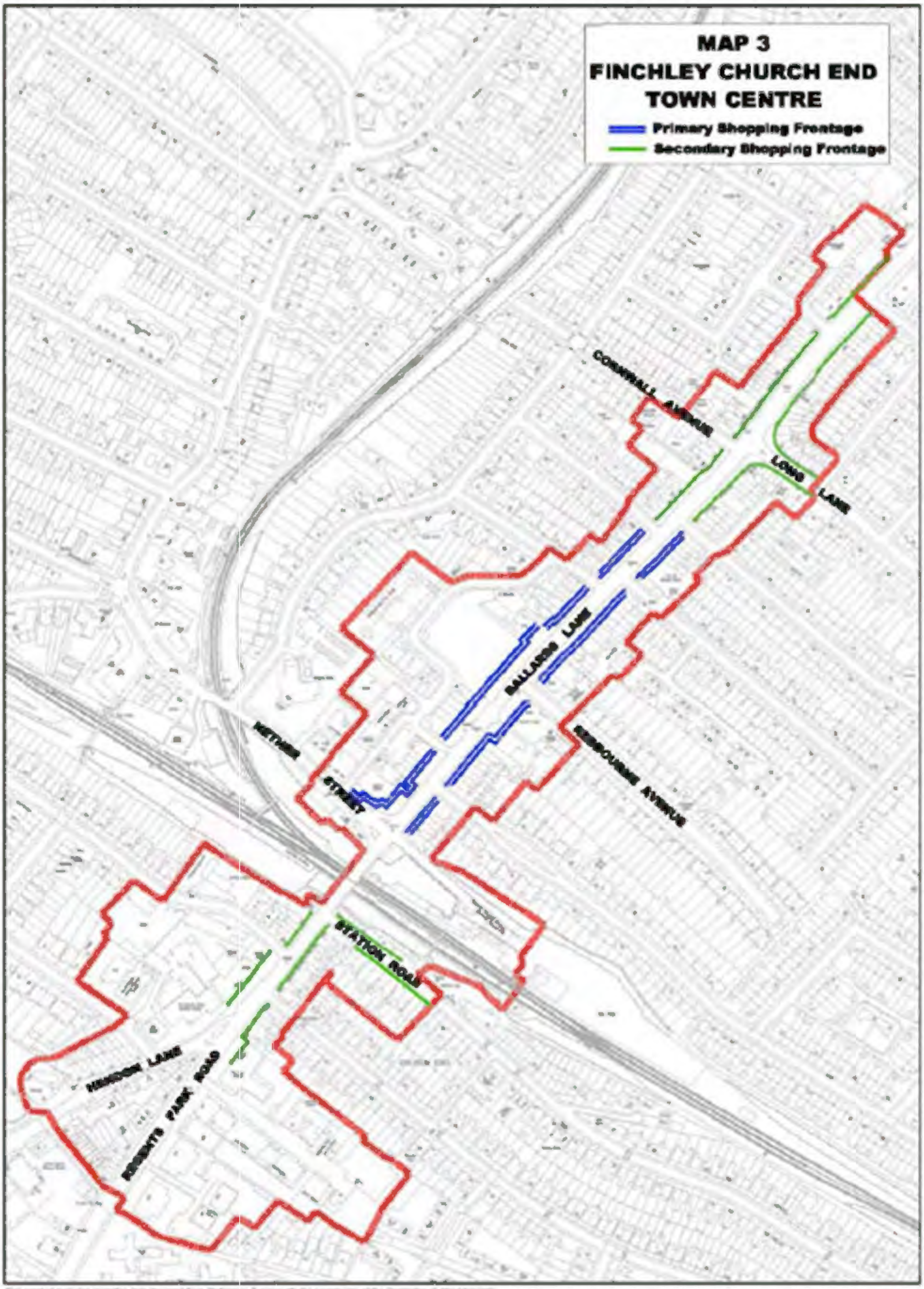
Car parking	There is a multi-storey car park situated to the rear of the Tesco foodstore which provides 291 spaces. A further 276 spaces are provided in the Finchley Central station car park and there is also some provision of pay & display on-street parking.
Pedestrian linkages & disabled access	Finchley Church End is linear in form from Regents Park Road to Ballards Lane. Navigation by foot is therefore straightforward, however there is a noticeable gap in retail provision near station road which dissuades pedestrians from travelling between these areas due to the perceived dislocation. In general, the pavement is wide and easy to navigate and most shops have level access, however the path narrows on the bridge over the Northern line on Regents Park Road.
Environmental quality	
Retail unit size & quality	Unit size predominantly small, reflecting the parade of shops present along Ballards Lane. There are a smaller number of larger floorplate retail units which accommodate the multiple retailers and also some of the larger international food stores. Building quality is mixed, reflecting the different parades present in the centre. The northern section of the Ballards Lane is poorer quality and would benefit from refurbishment. However, the primary shopping frontages are generally well maintained. with a few medium-large. Building quality is moderate, however poorer quality units are more prevalent to the north east of the centre.
Access to green space	Green space is available 5 minutes to the north (Victoria Park), 8 minutes to the north of the centre (Riverside Walk), and Church Gardens approximately 7 minutes to the north west.
Townscape & street furniture	Ballard Lane has a reasonable townscape with well maintained shopfronts, wide pavements. In particular, the soft landscaping near Tesco and at Long Lane provides a more attractive environment. There are a number of benches along the centre which is enhanced by the outdoor seating areas of café and restaurants along the Ballards Lane, increasing dwell time. Litter bins are prevalent and littering was minimal at the time of our visit. Cycle racks are also present.
Perception of safety & evidence of crime	During our visit, there was no evidence of anti-social behaviour or crime. Being a busy active street, it was good natural surveillance reducing the perception of crime.
Development opportunities & recent investment	**Development Opportunities:** The Finchley Church End Town Centre Strategy 2012 identifies the following development opportunities: • 401-405 Nether Street. Site area 0.1ha Currently vacant • 290-298 Nether Street. Site area 0.3ha. Current use: bar & restaurant, mini cab firm and car washing business. • Finchley Central Station Car Park (and land to the east). Site area (car park) 0.7ha. Current use: commuter car parking with 260 spaces and a building used for operational purposes • Station Road. Site area 0.4ha. Current use: single storey retail units, a minicab office and a builder's yard with associated offices. • Central House and 1-9 Ballards Lane. Site area 0.1ha. Current use: 9 storey office block (Central House) and a 3 storey building from Ballards Lane and some buildings fronting Albert Place • Tesco, Ballards Lane. Site area 1ha. Current use: Tesco supermarket and associated multi-storey car park accessed from Popes Drive with two storeys of office use above. **Recent investment:** • Gateway House site area 0.2ha. Mixed development comprising ground floor retail containing Little Waitrose, office and library with seven upper floors of residential space) • Winston House & 2-4 Dollis Park. Site area 0.6ha. Current use: six storey office, residential and storage and distribution uses. Planning permission granted in March 2012 (reference F/00497/11) for redevelopment of site for hotel, office, gym, residential and retail uses.
Commercial yields	According to Co-Star, the five-year average yield for Finchley Church End is 5.2% which is slightly lower than the borough district centre average of 5.5%. This lower yield indicates that investor confidence in Finchley Church End is slightly stronger than other centres in the borough. However, average figures can mask greater variations in the yield levels achieved in individual transactions so should be treated with some care.

<table>
<tr>
<td>Commercial rents</td>
<td>


According to Co-Star, asking rents in Finchley Church End have increased over the last five years from around £22 per sqft in Q1 2012 up to £26 per sqft in Q2 2017. Asking rents peaked at £27 in 2015 and have remained relatively stable Q2 2014. This trend suggests that operator demand for space in Finchley Church End has increased in recent years. The Finchley Church End five-year average asking rent is £26.14 per sqft which compares favourably to borough district centre five-year average of £24.42 per sqft. This suggests that Finchley Church End is one of the most attractive centres in the borough to operators but average rent figures should be treated with a degree of caution since they can mask greater variations recorded in individual transactions.
</td>
</tr>
<tr>
<td>Customer views & behaviour</td>
<td>
Of those that used Church End (Finchley), 32.58% noted no improvements. While 14.61% noted a better choice of shops in general.


</td>
</tr>
<tr>
<td>Retailer requirements</td>
<td>At the time of writing this study there are currently no published retailer requirements for Finchley Church End. However, it should be noted that some retailers do not publish stated requirements and therefore there could be a latent demand for representation in some centres.</td>
</tr>
</table>

<table>
<tr><th colspan="3">Recommendations</th></tr>
<tr><td rowspan="2">Summary (SWOT)</td><td>Strengths
▪ Good public transport accessibility and parking provision;
▪ Proximity to green space;
▪ Variety of national multiples retailers; and service providers.
▪ Opportunities for growth;
▪ Reduction in vacancies since previous retail study was undertaken.</td><td>Weaknesses
▪ Busy road and traffic congestion, creating poor pedestrian experience;
▪ Centre becomes dislocated on Regents Park Road;
▪ Potential for existing offices to be converted to residential in the future thus reducing daytime footfall.</td></tr>
<tr><td>Opportunities
▪ New mixed use development attracts more footfall;
▪ Enhance the streetscape by improving the appearance of some buildings and the conservation area;
▪ Ability to attract high footfall due to good public transport accessibility.</td><td>Threats
▪ Proximity to other centres (i.e. North Finchley) with competing retail offer;
▪ Ability to create place identify and additional footfall to attract national multiples and quality retailers;
▪ Ability to create coherent centre due to fragmenting railway bridge.
▪ Conversion of offices to residential reduces office floorspace and daytime activity.</td></tr>
<tr><td>Recommendation</td><td colspan="2">Moderate health
Overall the centre is performing reasonably well as evidenced by the reducing vacancy rate, and predominantly convenience and service orientated offer. The level of convenience provision is well above the national average, bolstered by a varied independent offer of international grocers and specialised food stores. However, the centre could improve its offer with a number of development opportunities available. There is also potential for change should any of the existing office blocks be converted to residential uses in the future. Public realm improvements could enhance the attractiveness of the centre and consideration could be given to reducing the extent of the town centre boundary around Regents Park Road. Notwithstanding this footfall appears to be reasonably strong. We therefore consider that overall the centre vital and viable, but could be improved.</td></tr>
</table>


MAP 3
FINCHLEY CHURCH END
TOWN CENTRE
Primary Shopping Frontage
Secondary Shopping Frontage
CORNWALL AVENUE
LONG LANE
BALLARDS LANE
NETHER STREET
REDBOURNE AVENUE
STATION ROAD
HENDON LANE
REGENTS PARK ROAD

GOLDERS GREEN (DISTRICT CENTRE) | **Date of survey: 31/05/2017**



Uses by category

Category	No. of units	% of units	UK %	Floorspace (sq.m)	Floorspace (%)	UK %
Convenience	19	10.2	9.41	4550	17.4	18.34
Comparison	40	21.5	39.10	5870	22.4	44.18
Services	116	62.4	38.17	14770	56.4	25.84
Vacant	11	5.9	12.13	1000	3.8	10.71
Other	0	0.0	1.19	0	0.0	0.97
Total	186	100.0	100	26190	100.0	100

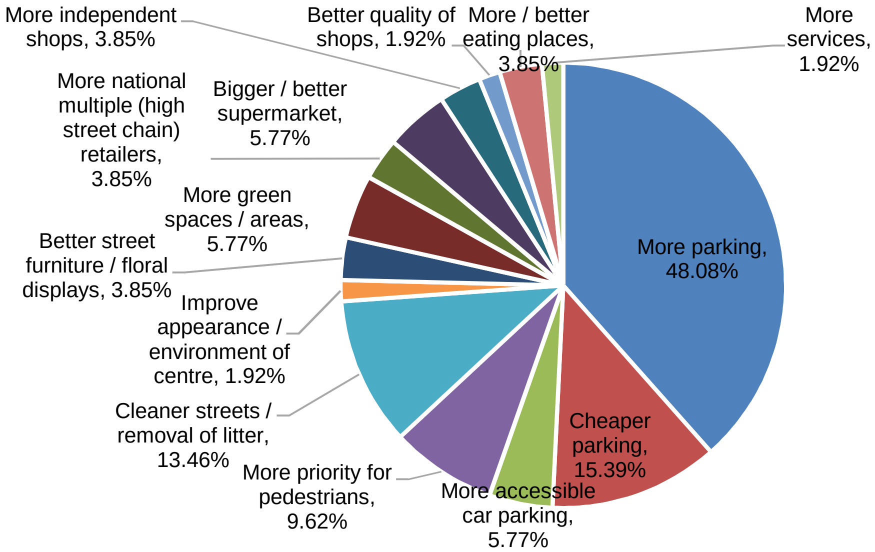
Diversity of uses & retailer representation

Foodstores	Golders Green has a good level of convenience provision which is in line with the national average. There are a number of multiple convenience retailers including a larger Sainsbury's store (1,580 sq. m gross) as well as a separate Sainsbury's Local (360 sq. m), a Tesco Express (410 sq. m) and a Costcutter (90 sq. m). There are also a number of independent convenience retailers including a number of international and ethnic grocery retailers (such as Golders Green International Supermarket), a baker, a greengrocer as well as a number of newsagents and off-licences.
National multiples	A number of comparison retail multiples have representation in Golders Green including Specsavers, Rymans, Carphone Warehouse, Holland and Barratt and two Boots stores. The proportion of comparison retail provision in Golders Green is significantly lower than the UK national average. However, this is largely as a consequence of the role of the centre which is predominantly focussed on services and its relatively close proximity to Brent Cross Shopping Centre.
Other retail uses & markets	The centre is also well served by a number of independent comparison retailers including a small clothing shops, a number of charity shops, a furniture shop, DIY and hardware store and a discount household goods store. The financial and professional sector is a strong feature of the centre with numerous high street banks and building societies including NatWest, Santander, Barclays, HSBC, Virgin Money, Nationwide and Lloyds Bank. National coffee chains include Costa Café Nero and Starbucks. In addition, branded hot food takeaway chain KFC and hairdressers Toni & Guy are also present. Various, including charity shops, takeaways, Beauty, opticians, hardware store, clothing. No market currently operates at Golders Green.
Other services	A post office, library, a college, and a number of churches of varied faiths. A Jewish learning exchange and a gym are also present in the centre.
Evening economy	Golders Green has limited evening activity due to its role as a service centre for primarily everyday items and daytime services, and its excellent transport links to central London and other larger centres. As a consequence, the centre has limited bars and public houses as well as no local theatres (the BBC hippodrome closed in 2007), cinemas or other cultural attractions. Nevertheless, there are a variety of restaurants and hot food takeaways which provide some night-time activity. The household survey results showed that 1.8% of respondents identified Golders Green as the location in which they spent most money on restaurants and cafes, with the majority of these being located in the centre's home zone.

Accessibility

Public transport & PTAL	The centre has excellent accessibility by public transport being centred around the Golders Green tube station on the Northern line. A bus station id directly adjacent to the tube station, providing a public transport interchange providing a large range of frequent bus services. These include services to Waterloo (139), White City (260), Ealing (226), Brent Cross (210), Finsbury Park (210) Pinner (13), Alperton (83, 245), North Finchley (460), Edmonton Green (102). National Express also operate coaches

	from Golders Green to destinations in the Midlands and the North. Consequently, the PTAL rating of the centre is 6a rising to 6b around the station.
Car parking	Sainsbury's (69 spaces) (free – customers only). Some provision of on-street parking. This did not appear cluttered at time of visit.
Pedestrian linkages & disabled access	Pedestrian movement is generally good despite being centred around a busy junction. A number of pedestrian crossing and island refuges enable pedestrians to navigate the centre relatively easy and pavement widths allow safe passage including for wheelchair users.
Environmental quality	
Retail unit size & quality	The unit sizes are generally small due to the regularity of purpose built shopping parades. A small number of units have been amalgamated to create larger floorplates to accommodate the Sainsbury's Local and Tesco Express stores. The only more modern purposed built, large floorplate retail unit is the Sainsbury's foodstore on North End Road. Overall the built environment is of a generally good standard, providing a clear and legible route along the centre. We note that a number of shopfronts we're undergoing renovation at the time of our visit. Vacancies have reduced since the last study (11 down from 15) and there are no obvious areas of multiple vacancies.
Access to green space	Limited greenspace within close proximity, however the Hampstead Heath extension lies approximately 0.75km to the North West of the centre.
Townscape & street furniture	The townscape is high quality; with an avenue of trees covering the primary shopping frontages on Golders Green Road and including heritage assets such as the prominent war memorial. The public realm at junction with Finchley Road is more functional and sparse, however the historic built form in this location offsets any lack of greenery. Planting around the tube and bus station helps to soften the expanse of tarmac. Outdoor seating associated with the various café outdoor enhance the streetscape and help to increase dwell time at the centre. Low levels of litter were evident at the time of our visit and there is a plentiful provision of bins.
Perception of safety & evidence of crime	There was no evidence of anti-social behaviour or crime during our visit. The centre feels safe with excellent natural surveillance.
Development opportunities & recent investment	TfL has ambition with regard to the development of the bus station.
Commercial yields	According to Co-Star, the five-year average yield for Golders Green is 4.3% which is low compared to the borough district centre average of 5.5%. This low yield level reflects generally strong investor confidence in the area. However, average figures can mask the greater variations the yield levels achieved in individual transactions so should be treated with some care.
Commercial rents	 According to Co-Star, asking rents in Golders Green have fluctuated between £29 and £27 per sqft over the past five years as shown in the graph. Average asking rents increased sharply from a low of £24 per sqft in Q2 2015 up a peak of £29 per sqft Q3 2016. In Q4 2014 unit 47-49 Golders Green Road was leased to Chay Charitable Trust at just £15 per sqft which explains why the rental levels in the graph drop off in 2014. The Golders Green five-year average asking rent is £26.41 per sqft which is higher

	than the borough district centre five-year average of £24.42 per sqft. This suggests that Golders Green is one of the more attractive centres in the borough to retail operators. However, as the graph shows, average rent figures should be treated with a degree of caution since they can mask greater variations recorded in individual transactions.
Customer views & behaviour	Of those that identified Golders Green as their nearest town centre, 48% did not think anything could be improved. Of those who did identify the need for improvement, car parking was the main issue flagged. 
Retailer requirements	There are seven current retailer requirements published for Golders Green, ranging from 800 sq. ft. up to 15,500 sq. ft. Retailers include national multiples such as Shoe Zone Ltd, Travelodge, Argos Ltd and Aldi.

Recommendations		
Summary (SWOT)	**Strengths** ▪ Centre benefits from a high-quality streetscape, heritage assets and quality building stock; ▪ Excellent public transport accessibility and access to tube station; ▪ Rise in asking rents since Q2 2015 indicates growing demand for floor space / improving quality of centre.	**Weaknesses** ▪ Busy road junction near the station; ▪ Lack of public off-street parking; ▪ Centre is comprised of a long row of retail units along Golders Green Road which lacks a coherent centre. ▪ No public realm ▪ No civic, cultural, or evening economy offer.
	Opportunities ▪ Enhance the appearance of buildings at west end to improve the streetscape; ▪ Expand provision of national multiples quality retailers, building on existing retailers and quality units.	**Threats** ▪ Inability to attract national multiples due to competition from other centres and quality of building stock; ▪ Declining building stock at peripheries of the centre due to failure to attract / increase footfall and distance from station.
Recommendation	**Good health** Overall the centre is performing well as evidenced by the reducing vacancy rate and increasing rents, and predominantly service orientated offer. The level of convenience provision is in line with the national average, bolstered by a varied independent offer. The significantly lower level of comparison retail provision compared to the UK average is due to the service role of the centre, providing a range of everyday needs. Whilst the Golders Green Road and Finchley Road are busy through routes, the centre has a number of crossing points and refuges providing clear pedestrian routes. Further public realm improvements could improve centre. Apart from Golders Green bus station, there are limited development opportunities are available due to the tight built form of the centre and the conservation area protection, though some re-development of individual units is likely to take place over time as part of the natural churn of occupiers in the centre.	


MAP 5
GOLDERS GREEN
TOWN CENTRE
Primary Shopping Frontage
Secondary Shopping Frontage
RAVENSCROFT AVENUE
HOOP LANE
ROTHERWICK ROAD
GOLDERS GREEN ROAD
FINCHLEY
ROAD
NORTH END ROAD
WEST HEATH DRIVE
RODBOROUGH ROAD

HENDON CENTRAL (DISTRICT CENTRE)	Date of survey: 31/05/2017

Uses by category

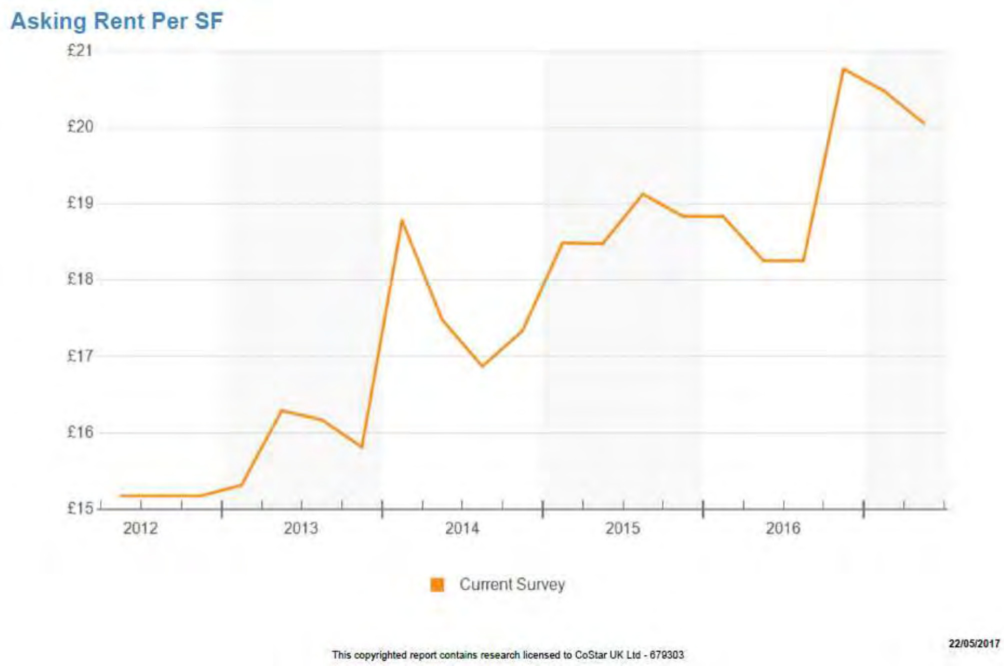
Category	No. of units	% of units	UK %	Floorspace (sq.m)	Floorspace (%)	UK %
Convenience	16	10.8	9.41	2,630	14.9	18.34
Comparison	23	15.5	39.10	3,260	18.4	44.18
Services	102	68.9	38.17	10,680	60.4	25.84
Vacant	3	2.0	12.13	330	1.9	10.71
Other	4	2.7	1.19	770	4.4	0.97
Total	148	100.0	100	17,670	100.0	100

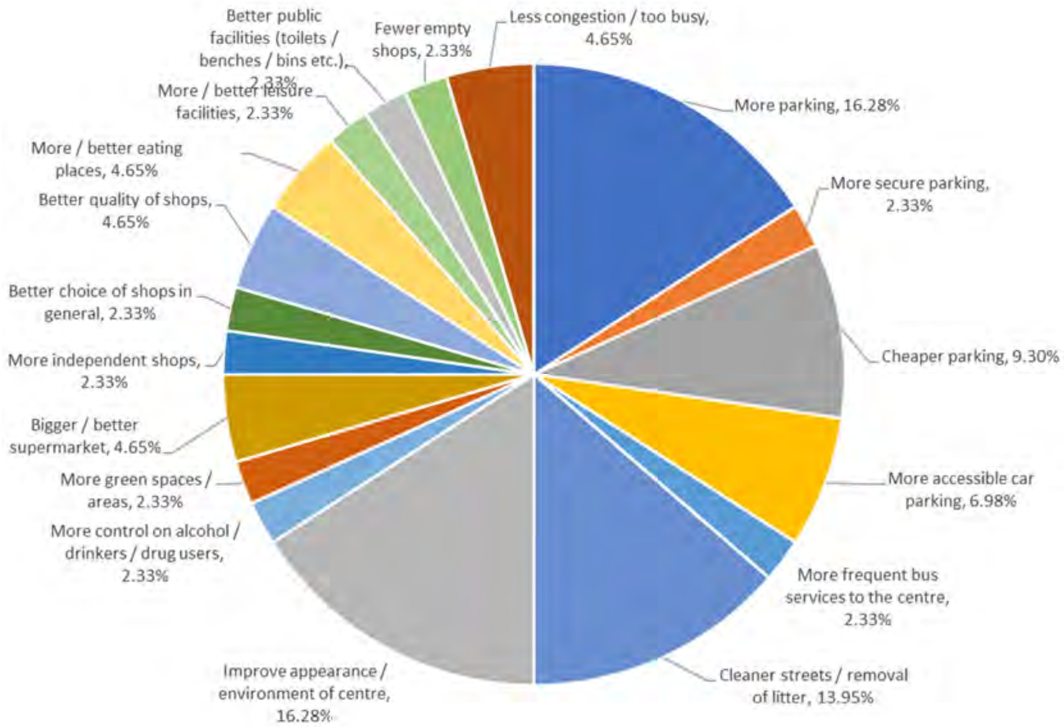
Diversity of uses & retailer representation

Foodstores	Hendon Central has convenience retail provision broadly similar to the national average. Current provision includes a Sainsbury's Local (230 sq.m gross) and Tesco Express (310 sq.m gross) on Vivian Way. In addition, there are a number of smaller convenience stores including Way 2 save international supermarket 400 sq.m (gross) and a Premier Express 130 sq.m (gross) on Watford Way. There is also a small Co-op store within the Texaco petrol filling station on Watford Road which lies just outside the northern boundary of the town centre. A number of chemists and newsagents are also present. Overall, the number of convenience stores has slightly reduced (down two) since the last study was undertaken.
National multiples	There are no multiple comparison operators represented in Hendon Central which is significantly below the UK average. However, this is explained by the very close proximity of Brent Cross Shopping Centre at approximately 0.75m south of the centre. Current multiple provision with Hendon Central falls within financial and professional (only NatWest remaining following the recent closure of HSBC); food and drink (Costa and Subway); hot food takeaway (KFC and Dominos); and betting shops (Ladbrokes, Coral and Paddy Power).
Other retail uses & markets	The role of Hendon Central is substantially orientated to the service sector with 102 units (up from 83 in the previous retail study). These principally include mobile phone repair shops, hairdressers, beauty salons, taxi office, launderette, funeral directors. In addition, there a number of food and drink establishments and hot food takeaways peppered across the centre reflecting a varied mix of international cuisines. This reflects the significant student population present. Positively the number of overall vacancies has reduced from the previous survey from 8 to the three units observed during our survey
Other services	Hendon Central has a range of other services including a Post Office, training Centre, personal Trainers, Nuffield Health Centre (which includes gym) and a Virgin Gym.
Evening Economy	Hendon Central has limited evening activity due to its role as a service centre for primarily everyday items and daytime services. In line with this there are very limited bars and public houses present as well as no local theatres or cinemas within the centre, reflecting its function as a district centre. Nevertheless, there are a number of restaurants and hot food takeaways which provide some night-time activity.

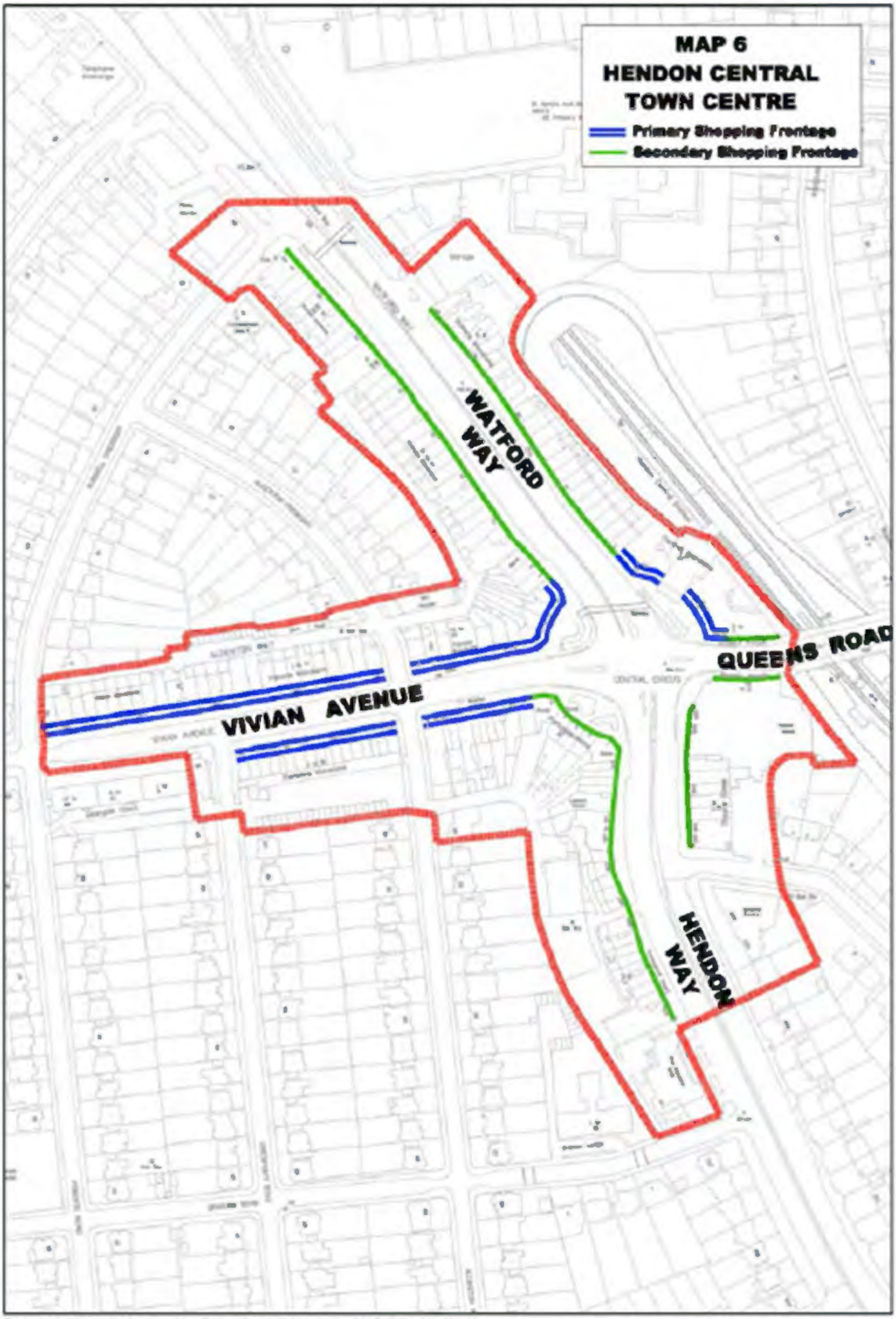
Accessibility

Public transport & PTAL	The centre has excellent accessibility by public transport being centred around the Hendon Central tube station on the Northern line. In addition, Hendon railway station is 1km to the west and numerous frequent bus services serve the centre. These include North-South services 113 (Edgware), 186 (Northwick Park Hospital) and 324 (Stanmore Station). East-west services include 83 (Golders Green). Reflecting this excellent accessibility Hendon Central has a PTAL rating of 5 rising to 6a around the tube station.
Car parking	Hendon Station (44 spaces) (pay); Perryfield Way (69 spaces) (pay); Sainsbury's (630 spaces) (free); Staples Corner Retail Park (360 spaces) (free). There is also some provision for short stay on-street parking.

Pedestrian linkages & disabled access	Watford Way / Hendon Way is a busy distributor road (three-lane dual carriageway) and severs the connection between areas of the centre. Whilst an underpass is available to avoid the traffic, the perception is that it restricts the movement of people on foot. Nevertheless, pavement width on Watford Way/ Hendon Way is generally good and most shops have disabled access. Vivian Avenue provides a more welcoming environment for pedestrians with lower levels of traffic and at level pedestrian crossings.
Environmental quality	
Retail unit size & quality	The unit sizes are generally small due to the centre comprising a number of parades. A small number of units have been amalgamated to create larger floorplates to accommodate the Sainsbury's Local and Tesco Express stores. Quality is generally good, particularly along Vivian Avenue where recent external refurbishment works have been undertaken. To the north of the centre at Watford Way, the quality of the shopfronts declines with a number of vacancies present, poorly maintained frontages or small areas of redevelopment. This is likely to be partially as a consequence of the busy main road and lower levels of footfall.
Access to green space	Close access to Hendon Park off Queens Road approximately 50m from the eastern extent of the centre.
Townscape & street furniture	Mixed townscape with Vivian Avenue presenting a pleasant tree lined avenue with wide pavements. However, Watford Way and Hendon Way is adversely affected by the busy dual carriageway which dominates this location as well as being a significant noise generator. Aside from Vivian Way, there is limited greenery (except some recent planting outside NatWest on Watford way). Limited seating available encouraging people to dwell. Plenty of rubbish bins evident, with limited litter observed.
Perception of safety & evidence of crime	Some limited evidence of graffiti. Feels generally safe but the centre does not feel particularly welcoming along the main road. Underpass under the main junction has the potential increase the perception of crime, with pedestrians unlikely to feel that it's a safe environment during the evening / night.
Development opportunities & recent investment	Possible development Opportunities: - Former garage adjacent to 44 Watford Way; Recent investment; - Improvements to public realm and street planting at Watford Way / Vivian Avenue Junction; - Refurbishment of frontages of two parades along Vivian Avenue. - Middlesex University campus investment
Commercial yields	According to Co-Star, the five-year average yield for Hendon Central is 5.7% which is slightly higher than the borough district centre average of 5.5%. This relatively low yield indicates that investor confidence in Hendon Central may be weaker than other centres in the borough. However, average figures can mask greater variations in the yield levels achieved in individual transactions so should be treated with some care.
Commercial rents	 According to Co-Star, asking rents in Hendon Central have increased over the last five years from around £15 per sqft in Q1 2012 up to £20 per sq.ft in Q2 2017. This trend suggests that operator demand for space in Hendon Central has increased in recent years.

<table>
<tr><td></td><td colspan="2">Hendon Central has the lowest five-year average asking rent out of all the boroughs district centres at is £ 17.01 per sq.ft. This is significantly lower than the borough district centre five-year average of £24.42 per sq.ft. This suggests that Hendon Central is the least commercially attractive centre in the borough to occupiers overall. However, average rent figures should still be treated with a degree of caution since they can mask greater variations recorded in individual transactions.</td></tr>
<tr><td>Customer views & behaviour</td><td colspan="2">Of those that accessed Hendon Central, 34.88% noted no improvements. Improving the appearance/environment of the centre was the highest improvement noted.

</td></tr>
<tr><td>Retailer requirements</td><td colspan="2">There are no current retailer requirements specified for Hendon Central.</td></tr>
<tr><td colspan="3">Recommendations</td></tr>
<tr><td rowspan="2">Summary (SWOT)</td><td>Strengths
▪ Proximity to tube station and good overall excellent public transport accessibility
▪ Increasing asking rent since 2012;
▪ Reduction in vacancies from the previous survey being undertaken;
▪ Recent investment in public realm outside Natwest;</td><td>Weaknesses
▪ Pedestrian accessibility is poor due to busy road and underpass;
▪ Limit options available to address traffic without substantial investment;
▪ Heavy reliance on the service sector which leaves the centre vulnerable to changing consumer spending habits.</td></tr>
<tr><td>Opportunities
▪ Opportunity to enhance streetscape through further environmental improvements;
▪ Opportunity for small scale redevelopment to attract new occupiers;
▪ Greater opportunity to attract cafes and restaurants, particularly with expanding student population.</td><td>Threats
▪ Growing level of traffic could lead to declining activity along Watford Way/ Hendon Way and also hampers potential for public realm improvements;
▪ Proximity to other retail centres. Particularly in relation to proximity to Brent Cross shopping centre.</td></tr>
</table>

Recommendation	**Moderate / good health** Overall the centre is performing generally well as evidenced by its low vacancy rate, and predominantly service orientate offer. The level of convenience provision is also close to the national average, bolstered by a varied independent offer. Despite having a significantly lower level of comparison retail provision, the centre is able to provide a range of everyday needs and there are opportunities to better serve the student population of the nearby Hendon campus. The main issue is the severing effect of Watford Way/ Hendon Way which is difficult to improve without substantial investment. However further public realm improvements could improve and maximise potential development opportunities to the north of the centre on Watford Way. Overall the centre is vital and viable.


MAP 6
HENDON CENTRAL
TOWN CENTRE
Primary Shopping Frontage
Secondary Shopping Frontage
WATFORD WAY
VIVIAN AVENUE
QUEENS ROAD
HENDON WAY

MILL HILL (DISTRICT CENTRE) | **Date of survey: 31/05/2017**

Uses by category

Category	No. of units	% of units	UK %	Floorspace (sq.m)	Floorspace (%)	UK %
Convenience	13	11.6	9.41	2,630	14.7	18.34
Comparison	25	22.3	39.10	3,710	20.8	44.18
Services	69	61.6	38.17	10,230	57.2	25.84
Vacant	3	2.7	12.13	750	4.2	10.71
Other	2	1.8	1.19	550	3.1	0.97
Total	112	100.0	100	17,870	100.0	100

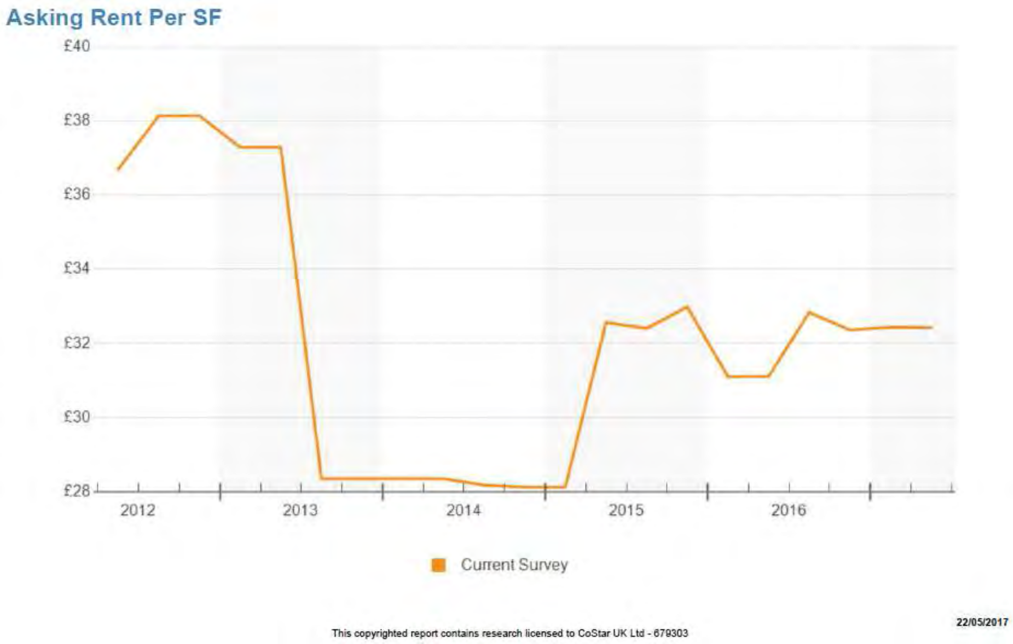
Source: GOAD and PBA research

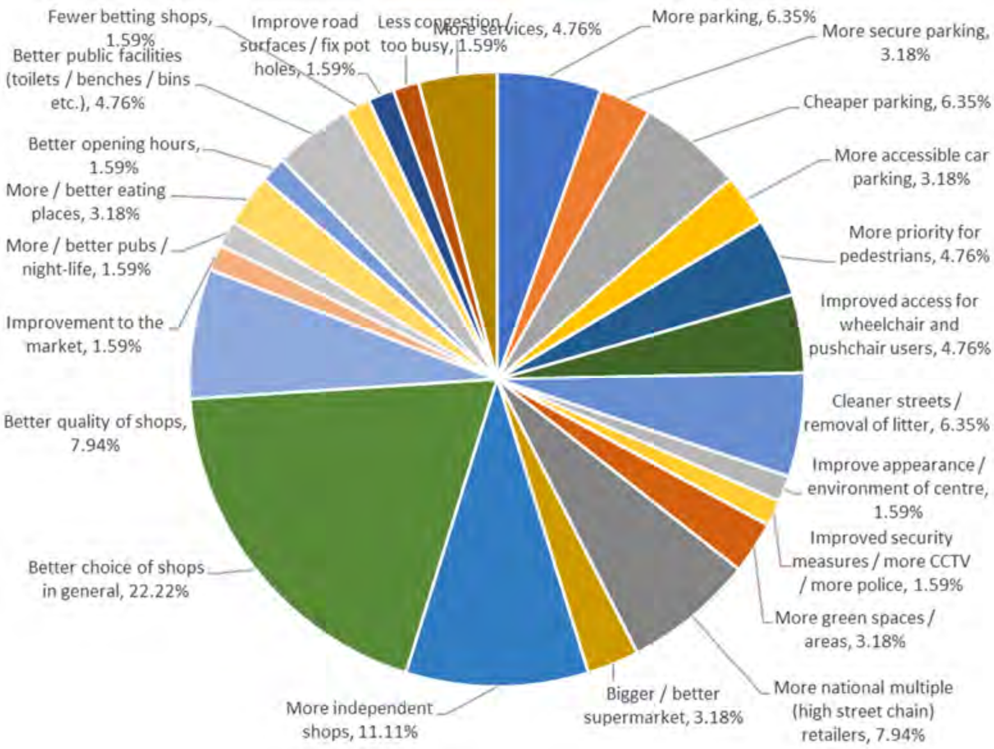
Diversity of uses & retailer representation

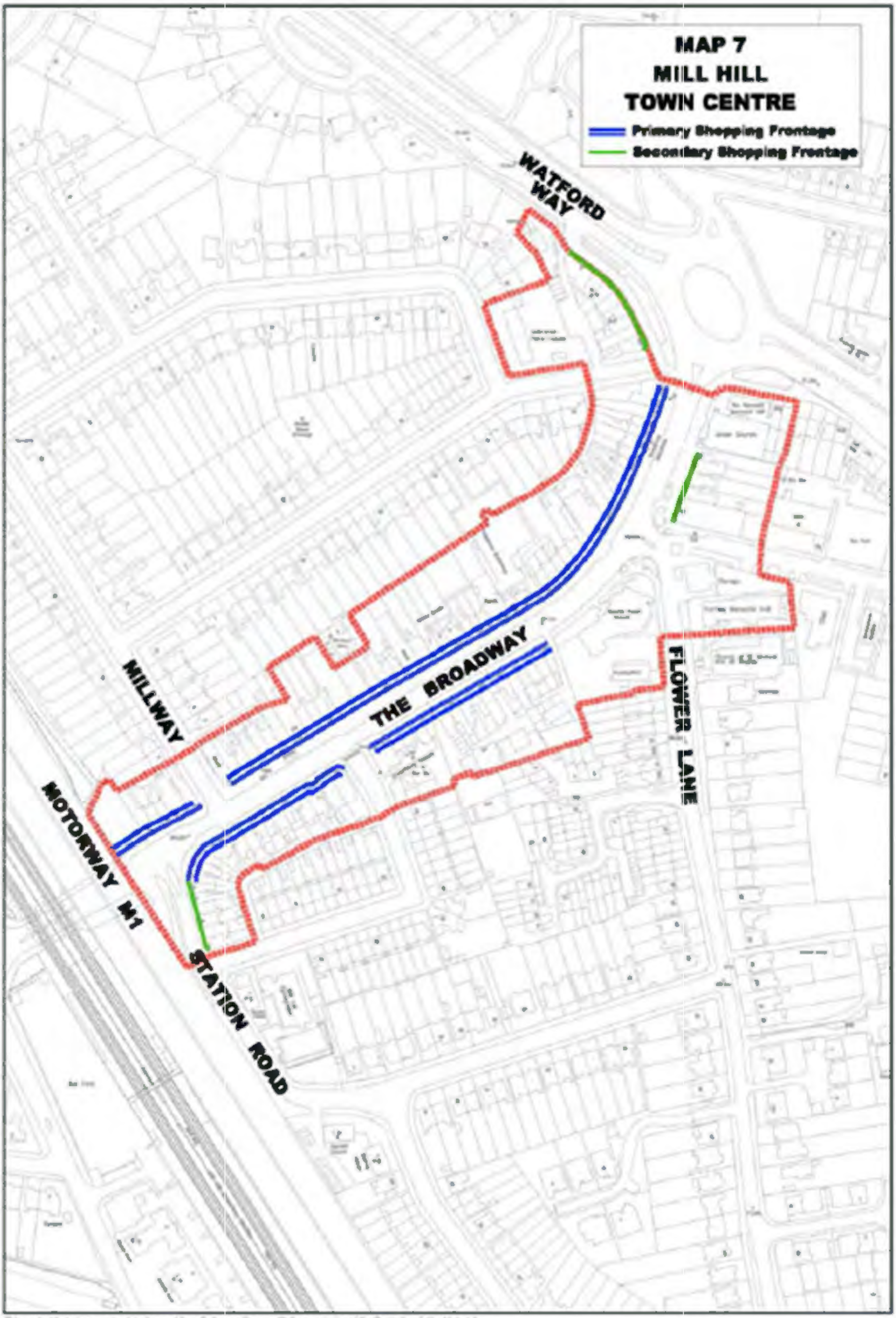
Foodstores	A Marks and Spencer's Food Hall is the main foodstore in Mill Hill, located at the southern end of the centre. A Tesco Express and Iceland are more centrally located along The Broadway. Other convenience stores in the centre take the form of independent foodstores (including a baker and butcher) and newsagents. Overall the level of convenience provision in Cricklewood is higher than the UK average.
National multiples	There is a good representation from multiple comparison operators including WH Smith, Boots and Boots Opticians. Café and restaurant multiples present are Costa Coffee, Prezzo, Pizza Express, Greggs and Pizza Hut. There is a relatively high representation from bookmakers: Ladbrokes, Coral and Jennings.
Other retail uses & markets	In addition to the multiple operators, there is a reasonable range of independent comparison retailers (including fashion boutiques). There are also numerous cafés and restaurants and hot food takeaways, however there is a notable lack of public houses and bars within the centre. Banks and building societies (including NatWest, Nationwide, Halifax and Santander) are well represented being clustered in the centre of the District Centre, though we understand further closures of branches are anticipated. There are five estate agents spread through the centre. There is also a relatively high representation of charity shops, with four stores. However they are distributed across the centre and therefore are not a particular concern. A French Market operates on Broadway approximately 6-8 times a year organised by the Mill Hill Neighbourhood Forum.
Evening economy	As identified above, Mill Hill provides a reasonable range of independent restaurants and hot food takeaways including. However, there are very few pubs (Bridge Tavern) and bars (Half Full) so therefore evening activity overall is limited. The centre does not contain a cinema or bowling alley - the nearest cinemas are Reel Cinema, Borehamwood and Phoenix Cinema, East Finchley.
Other services	Retail services are well represented with numerous independent hairdressers and beauty salons, spa, dry cleaners, pound shop and a Post Office. Other services an Anytime Fitness accessed off Flower Lane. Mill Hill Library is also situated on Hartley Avenue just outside of the centre.

Accessibility

Public transport & PTAL	Mill Hill Broadway train station is located 150 metres south of the centre on Station Road. There are also numerous frequent bus services along Cricklewood Broadway including routes 186, 221, 240, 251, 605 and 688 to/from Edgware, Brent Cross, Golders Green, Arnos Avenue and Northwick Park Hospital. The centre has a rating or PTAL 4; whereas the area of surrounding the railway station has a rating of PTAL 5.
Car parking	Mill Hill Broadway Station (42 spaces) (pay); Bunns Lane (184 spaces) (pay); Daws Lane (102 spaces) (free). Some provision of on-street parking.

Pedestrian linkages & disabled access	The linear nature of the centre is easy to navigate and access by disabled users is generally possible though some shops only have stepped access. Pedestrian crossings are prevalent through the centre. Pavements are wide enough to accommodate a range of users.
Environmental quality	
Retail unit size & quality	As a predominantly linear high street, the majority of the centre's units are smaller, however larger floorplate units (either through amalgamation or redevelopment) have been created to accommodate primarily multiple retailers. Building quality is generally good along The Broadway, particularly where the multiple retailers are present
Access to green space	Three are numerous adjacent parks and areas of open space located approximately 300m away (Mill Hill Park, St. Joseph's College Grounds, Lyndhurst Park and Symonds Mead).
Townscape & street furniture	Centre has good provision of benches. Street planting is good (i.e. trees & hanging baskets). Litter bins are prevalent and minimal littering. Some cluttering of shop bins on pavements. Café and restaurant outside seating provides positive contribution to townscape.
Perception of safety & evidence of crime	No evidence of anti-social behaviour or crime on the day of our visit. Under the bridge to the west could be perceived to by some as being intimidating at night. There is limited CCTV coverage in the centre (camera mounted outside Boots on Broadway). The Mill Hill Neighbourhood Forum have stated a number of anti-social incidents that have occurred recently in the centre. Better natural surveillance through an enhanced evening activity may assist in reducing this.
Development opportunities & recent investment	None evident at the time of visit. However, LBB has consulted on proposals for the 'Brockhenhurst Garden/ Town Square' in the centre which will provide a flexible open spaces / pocket park including for events and activities. The Mill Hill Neighbourhood Forum are also seeking to prepare a Neighbourhood Plan which will identify opportunities for development/ redevelopment in the centre (such as mixed use redevelopment associated with the Mill Hill Broadway railway station) in due course.
Commercial yields	According to Co-Star, the five-year average yield for Mill Hill is 7.7% which is higher than the borough district centre average of 5.5%. This relatively high yield indicates that investor confidence in Mill Hill is weaker than other centres in the borough. However, average figures can mask greater variations in the yield levels achieved in individual transactions so should be treated with some care.
Commercial rents	 According to Co-Star, asking rents in Mill Hill have decreased over the last five years from around £38 per sq. ft in Q3 2012 down to £32 per sq. ft in Q4 2016 and have stabilised since then. Over this period the lowest asking rents were recorded in between Q3 2014 and Q1 2015. Co-Star recorded twice as many deals in 2015 as in 2014 which explains why the rent levels troughed and then peaked in this way - in 2014 just three deals were recorded but six deals were recorded in 2015. The Mill Hill five-year average asking rent is £31.19 per sq. ft which compares favourably to borough district centre five-year average of £24.42 per sq. ft. This indicates that Mill Hill is one of the most attractive centres in the borough to operators despite the fact that rental values have declined in recent years. Average rent figures should be treated with a degree of caution since they can mask greater variations recorded in individual transactions.

<table>
<tr><td>Customer views & behaviour</td><td colspan="2">Of those that accessed Mill Hill, 26.98% noted no improvements. The highest mentioned improvement was a ‘better choice of shops in general’ at 22.22%.
</td></tr>
<tr><td>Retailer requirements</td><td colspan="2">There are 10 current retailer requirements published for Mill Hill, ranging from 500 sq. ft. to 100,000 sq. ft. Retailers include national multiples such as Aldi Food Store Ltd, Majestic Wine, Café Nero and Travelodge</td></tr>
<tr><td colspan="3">Recommendations</td></tr>
<tr><td rowspan="2">Summary (SWOT)</td><td>Strengths
▪ Relatively low vacancy rate;
▪ Relatively good public transport accessibility (proximity to train station);
▪ Variety of retail, cafes, restaurants and service provision available;
▪ Strong presence of a mix of popular national multiples;
▪ Quality of public realm;</td><td>Weaknesses
▪ M1 flyover leads to elevated noise and creates an uninspiring entrance to the centre via train;
▪ Broadway is a relatively busy road and long high street creating a lack of cohesive centre;
▪ On street parking provides can appear cluttered;
▪ Relatively high provision of charity shops and betting shops; and
▪ Relatively low provision of comparison stores, particularly national multiples.</td></tr>
<tr><td>Opportunities
▪ Reach critical mass of quality retail and leisure operators to attract new operators and footfall to the centre;
▪ Increased leisure provision to enhance the evening economy
▪ Improved public realm; and Mixed use redevelopment at Mill Hill Broadway Station</td><td>Threats
▪ Failure to enhance the offer in the more peripheral parts of the centre may lead to stagnation in the performance of the centre;
▪ Loss of footfall to other centres with more national multiple comparison retailers;
▪ Linked to the above, a greater predominance of discount stores could undermine the retail mix, and thus changing the perception of the centre.</td></tr>
<tr><td>Recommendation</td><td colspan="2">Good health
Overall the centre is performing well due to the relatively strong presence of key multiple retailers, cafes, restaurants and leisure provision, and varied mix of independent retailers. Additionally, the food and drink and leisure offer increases dwell time in the centre and generates good levels of footfall to support independent retailers. Limited change to the centre has occurred since the previous study was undertaken and suitable re-development and reconfiguration opportunities will assist in ensuring the centre continues to be attractive to both multiple and independent retailers. This is particularly important in light of predicted bank branch closures. The functioning of the centre is considered to be in line with the shopping hierarchy.</td></tr>
</table>


MAP 7
MILL HILL
TOWN CENTRE
Primary Shopping Frontage
Secondary Shopping Frontage
WATFORD WAY
THE BROADWAY
MILLWAY
FLOWER LANE
MOTORWAY M1
STATION ROAD

NEW BARNET (DISTRICT CENTRE)	Date of survey: 05/05/17



Uses by category

Category	No. of units	% of units	UK %	Floorspace (sqm)	Floorspace (%)	UK %
Convenience	3	6.8	9.41	5,000	54.5	18.34
Comparison	8	18.2	39.10	960	10.5	44.18
Services	27	61.4	38.17	2,940	32.0	25.84
Vacant	6	13.6	12.13	280	3.1	10.71
Other	0	0.0	1.19	0	0.0	0.97
Total	44	100	100	9,180	100	100

Source: GOAD and PBA

Diversity of uses & retailer representation

Foodstores	Sainsbury's (4,760 sqm gross) and one small independent convenience store.
National multiples	Pizza Hut, Betfred, Puregym, HSS, Sainsbury's
Other retail uses & markets	There are two large specialist comparison stores within the centre (HSS tool and machine hire and motorcycle accessories) which account for over 60% of the comparison floorspace in the centre. The rest of the comparison floorspace is occupied by independent retailers catering to localised needs.
Evening economy	One public house, a social club and four takeaways, together with several restaurants. Focused on low value end of the market. No other leisure facilities to generate evening footfall.
Other services	Range of hairdressers and salons, estate agents, dry cleaners, optician and dentists. The gym, operated by Puregym, accounts for one third of service floorspace in the centre. Financial services offer limited to a cash/cheque centre – no banks or building societies within the centre. There is a post office counter within the independent convenience store.

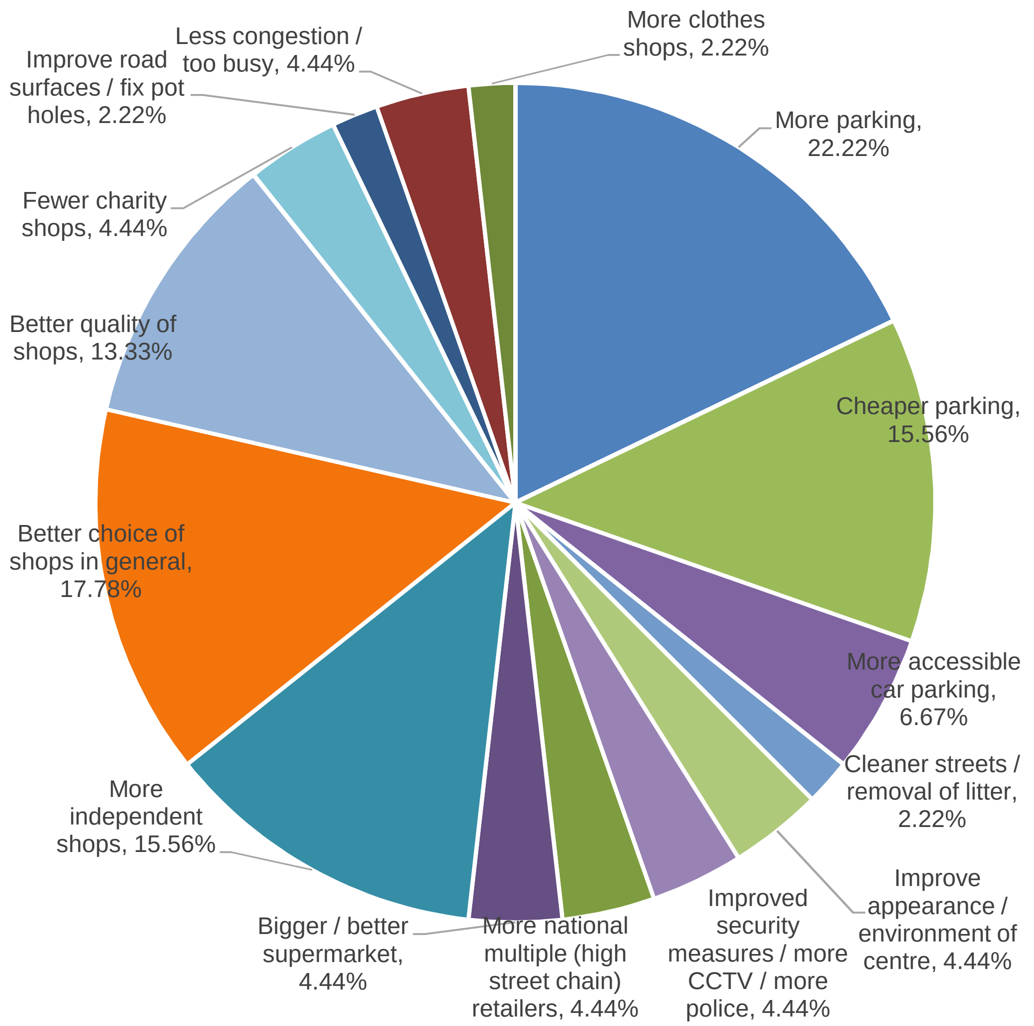
Accessibility

Public transport & PTAL	3-4
Car parking	New Barnet Station (50 + 60 spaces) (pay); Sainsbury's (150 spaces) (free); East Barnet Road North (39 spaces) (pay); East Barnet Road South (22 spaces) (pay).
Pedestrian linkages & disabled access	A110 is a busy road with high vehicle traffic. While shops and services are on both sides of the road, there are good pedestrian crossings. Pavements wide and the pavement surface is generally even.

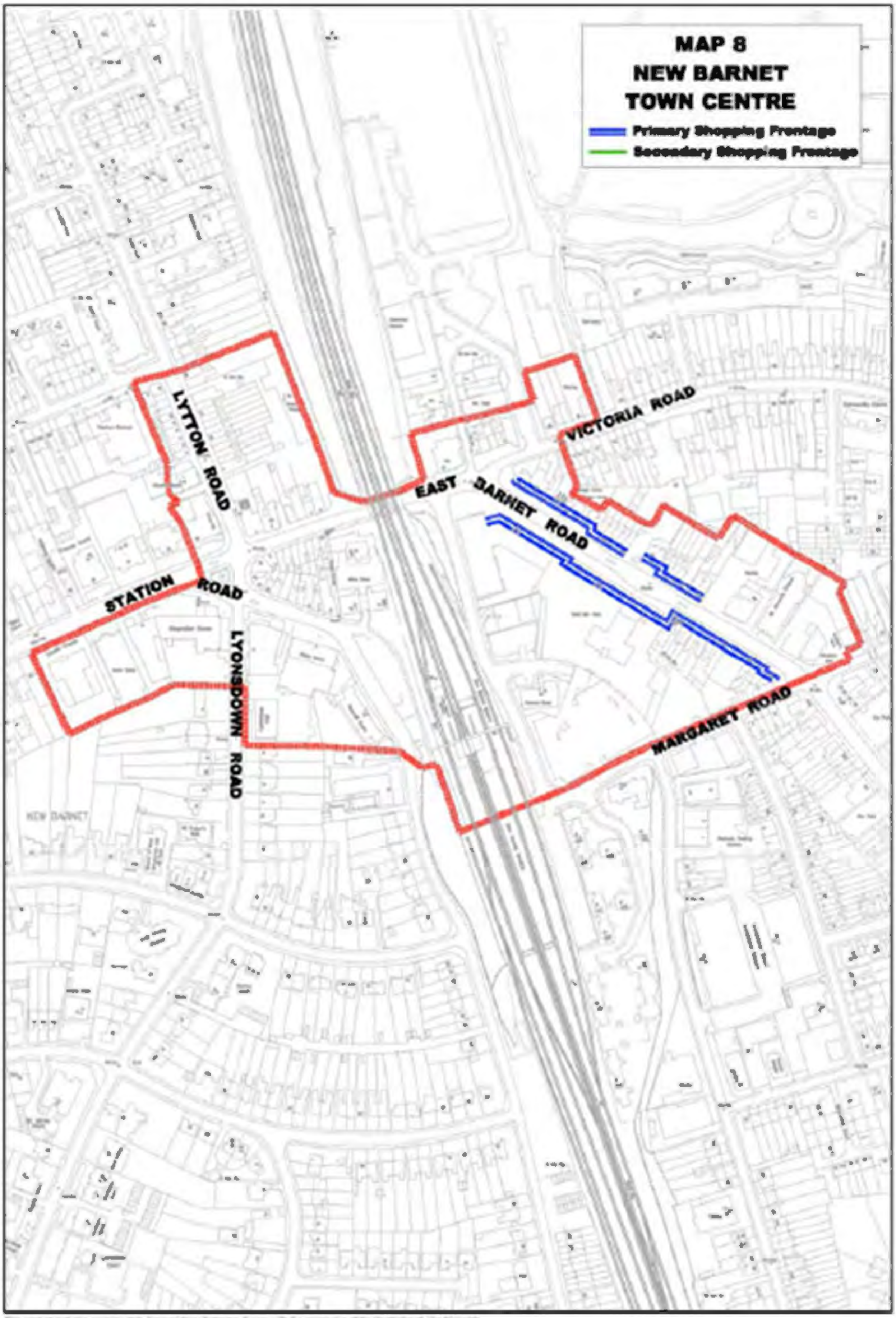
Environmental quality

Retail unit size & quality	The Sainsbury's store has significant inactive frontage in East Barnet Road. Other than the large Sainsbury's, units are mostly small and of moderate quality; there is scope for refurbishment of the some of the units to improve their appearance.
Access to green space	Victoria Recreation Ground is approximately 300m to the north of the centre.
Townscape & street furniture	Pavements are wide throughout and generally clean. Some littering was evident on visit. Trees line the street outside Sainsbury's store which enhance the public realm. Some parts of the centre would benefit from greater planting and street furniture.
Perception of safety & evidence of crime	No evidence of anti-social behaviour or crime during the site visit. However the New Barnet Town Centre Framework highlights that the 'hostile public realm is a car dominated environment with a lack of surveillance over some public spaces (non-active/blank frontages) and lack of security through public lighting.
Development opportunities & recent investment	Development opportunities The 2010 Town Centre framework identifies following development opportunities: • Former East Barnet Gar Works Site and surrounding land, Site area 5.35ha (southern end located in centre). Mixed use development with leisure/sports uses which is under construction.

	• New Barnet's Sainsbury's. Site area 1.03ha. Opportunity for enhancement of existing store in particular to improve the blank frontage to East Barnet Road. • Fayers Building Yard and Kingdom Church Hall. Site area 0.19ha. Suggested retail at ground floor with a mix of acceptable uses above store inc. residential, office and community uses. Recent investment: • New residential development at Sambroke Square and Victoria Road • Mixed-use development at Albert Gasworks (B/04834/14 approved 01/05/15) • New leisure centre at Victoria Recreation Ground (16/6118/FUL approved at January 2017) • New development at site at Corner of East Barnet Road and Victoria Road • New development at Tewkesbury Close
Commercial yields	According to Co-Star, the five-year average yield for New Barnet is 5.0% which is low compared to the borough's district centre average of 5.5%. This low yield level reflects generally strong investor confidence in the area. However, average figures can mask the greater variations the yield levels achieved in individual transactions so should be treated with some care.
Commercial rents	 According to Co-Star, asking rents in New Barnet have fluctuated between £22 and £21 per sqft over the past five years as shown in the graph. Average asking rents increased sharply from a low of £18 per sqft in Q1 2015 up a peak of £27 per sqft Q2 2016. Co-Star recorded five deals in 2016 compared to just one deal recorded in 2015 which explains why average rents levels increased in 2016. The New Barnet five-year average asking rent is £22.00 per sqft which is somewhat lower than the borough district centre five-year average of £24.42 per sqft. This suggests that New Barnet is less attractive to operators than other centres in the borough, however average rent figures should be treated with a degree of caution since they can mask greater variations recorded in individual transactions. The recent increase in rent levels indicates that the viability New Barnet is improving.

<table>
<tr><td>Customer views & behaviour</td><td colspan="2">Of those that noted New Barnet, 26.67% did not think any improvements are needed. However, of those that stated the need for improvements, the highest was ‘more parking’ with 22.22%.

</td></tr>
<tr><td>Retailer requirements</td><td colspan="2">There are no retailer requirements currently published for New Barnet.</td></tr>
<tr><td colspan="3">Recommendations</td></tr>
<tr><td rowspan="2">Summary (SWOT)</td><td>Strengths
▪ Quantity of car parking;
▪ Large Sainsbury’s which is likely to attract significant footfall to the centre;
▪ Good public accessibility level;
▪ New residential development in area.</td><td>Weaknesses
▪ Poor comparison retail offer and clear lack of national multiples expected of a district centre;
▪ Shop units are mostly small, and some units are poor quality;
▪ Poor access to high quality public space
▪ Railway bridge disconnects centre, creating disjointed feel to the centre.</td></tr>
<tr><td>Opportunities
▪ Enhance strength of centre with the approved mixed use development at Albert Gasworks;
▪ Opportunity to enhance public realm with street furniture and planting;
▪ Re-connect town centre with Victoria Recreation Ground and new leisure facility.</td><td>Threats
▪ Concentration of footfall to Sainsbury’s, and failure to attract footfall to other units due to quality of offer;
▪ Inability to attract national multiples due to small retail units and dominance of Sainsbury’s store;
▪ Deterioration of centre due to failure to attract footfall to poor comparison retail offer.</td></tr>
</table>

Recommendation	**Moderate health** The centre is effectively anchored by a large Sainsbury's store which, together with New Barnet station, means there is significant footfall. There is some scope for the centre to retain a greater level of local expenditure if the choice and supporting service offer were to be enhanced to match, though this is limited. There is scope for this to happen through the Gas Works redevelopment and the fact that Sainsbury's anchors the other end of the centre should ensure that footfall is not lost from elsewhere with a new development coming forward. There is little or no evening economy in the centre, with the offer clearly catering to people travelling through the centre from the station or on buses, rather than spending time in the centre. Higher density residential development, and therefore greater population, would improve prospects of supporting a better quality evening economy, however office to residential conversions will reduce daytime footfall. The scale of the centre is more akin to other local centres in Barnet, however, however due to the presence of the anchor Sainsbury's store we consider that the designation as a District centre remains appropriate.


MAP 8
NEW BARNET
TOWN CENTRE
Primary Shopping Frontage
Secondary Shopping Frontage
LYTTON ROAD
EAST BARNET ROAD
VICTORIA ROAD
STATION ROAD
LYONSDOWN ROAD
MARGARET ROAD
NEW BARNET

TEMPLE FORTUNE (DISTRICT CENTRE)	Date of survey: 31/05/2017



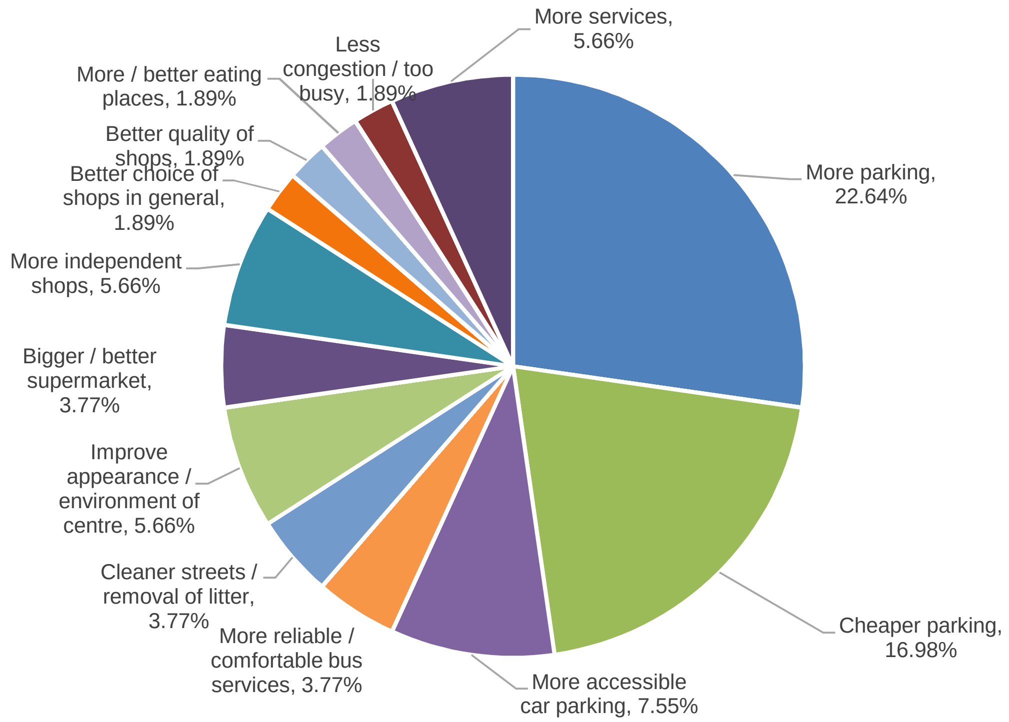
Uses by category

Category	No. of units	% of units	UK %	Floorspace (sq.m)	Floorspace (%)	UK %
Convenienc	26	16.6	9.41	5,173	23.3	18.34
Comparison	51	32.5	39.10	6,590	29.7	44.18
Services	72	45.9	38.17	8,870	40.0	25.84
Vacant	7	4.5	12.13	1,380	6.2	10.71
Other	1	0.6	1.19	180	0.8	0.97
Total	157	100.0	100	22,193	100.0	100

Foodstores	Temple Fortune retains an above UK average level of convenience provision with a Waitrose foodstore (1,230 sq. m gross) and an M&S Foodhall (1,200 sq.m gross) anchoring the central area of the centre. In addition, there are a number of local convenience stores (including greengrocers, health food stores, delis, newsagents, off licences and specialist ethnic stores including Moshes Kosher Convenience store).
National multiples	There are a number of comparison retail multiples represented including WH Smith, American Golf, Topps Tiles, Magnet, Dulux Decorating centre and an Oxfam charity shop. Whilst the level of comparison retail units is below the national average, it is higher relative to other similar scale District centres within the Borough.
Other retail uses & markets	There is a strong independent offer in the centre with a number of clothing boutiques, gift shops, and shoe stores, Financial and professional multiples present include Barclays, NatWest and Foxtons estate agent and there is also a William Hill bookmakers. Café chain Costa is present in the centre, though there is a much greater provision of independent coffee houses. Other uses represented in the centre a Mercedes car dealership and a Kwik Fit centre. Services are also well represented in the centre - being above the national average - with nail bars, hair salons, newsagents, off licences and travel agencies. No regular market operates in the centre, however there is an annual international food festival each year.
Evening economy	The centre has a reasonable level of evening activity for the size of centre with 15 units in restaurant, bar and pub use and four takeaways. The household survey identified that 1.3% of respondents named the centre as the main location where they spent money on restaurants and cafes; its attraction for pubs and bars was more limited (0.4%). Leisure activity is limited with no local theatres or cinemas present within the centre.
Other services	These are relatively limited due to the proximity of Golders Green; however, there is a Post Office, a number of dentists and a private clinic.
Accessibility	
Public transport & PTAL rating	Temple Fortune is not directly served by a tube station or a national railway station. However, there are a number of regular bus services including 13 (Victoria), 102 (Brent Cross) and 460 (Willesden). In light of this, the PTAL rating for the centre is 2.
Car parking	Marks & Spencer (customer only). On street parking (pay & display) on main high street. This is cluttered in some areas, and some parking is provided on the pavement.
Pedestrian linkages & disabled access	The centre comprises a long linear busy road; however, there are multiple pedestrian crossings and the road width is narrower throughout the centre, providing easy movement around the centre. The pavement is wide and largely of a good quality. Most shops have level access for customers.

Environmental quality	
Retail unit size & quality	Centre has a mix of unit sizes. The majority of unit sizes are smaller reflecting the traditional parade format of shopfronts. However, a number of these have been amalgamated to create larger floorplate stores to accommodate multiple retailers including Waitrose and American Golf. Larger purpose built units are also present to accommodate the M&S Foodhall and the Mercedes dealership. Unit quality is generally good with shop fronts being well maintained. A number of units are undergoing renovation which may explain the current higher vacancy level (7 units vacant up from 3 in the previous retail study).
Access to green space	There is accessible green space located approximately 100m north of the northern-most end of the centre (Dollis Valley Greenwalk).
Townscape & street furniture	Centre has a pleasant suburban feels with purpose-built parades of shops and arcades. The centre has sections of tree planting which could be enhanced even further(trees). There is a good provision of street furniture with benches and bike racks at appropriate points. Litter bins are also prevalent minimal littering was observed. Café & restaurant al fresco seating provides a positive contribution to townscape.
Perception of safety & evidence of crime	There was no evidence of anti-social behaviour or crime at the time of visit. The centre feels safe and welcoming with good natural surveillance.
Development opportunities & recent investment	Limited development opportunities. Refurbishment of 786 Finchley Road recently completed.
Commercial yields	According to Co-Star, the five-year average yield for Temple Fortune is 6.7% which is somewhat higher than the borough district centre average of 5.5%. This yield level indicates that investor confidence in Temple Fortune is weaker than other centres in the borough. However, average figures can mask greater variations in the yield levels achieved in individual transactions so should be treated with some care.
Commercial rents	 According to Co-Star, asking rents in Temple Fortune have increased over the last five years from around £35 per sq.ft in Q1 2012 up to £38 per sq.ft in Q2 2017. Asking rents peaked between Q1 2014 and Q4 2015 where they fluctuated at £41 - £42 per sq.ft. After Q1 2016 rental levels steadily declined from around £41 down to £38 per sq.ft in Q2 2017. Co- Star recorded nine deals in 2014/2015 compared to just one deal in 2016/2017 which explains why the average rental level drops off sharply in the graph. Temple Fortune has the highest five-year average asking rent out of all the boroughs district centres at £38.63 per sq.ft. The borough's district centre five-year average is £24.42 per sq.ft.

Customer views & behaviour	39.63% of those that identified Temple Fortune as their local centre, felt that no improvements were required. Those that did note the need for improvement mentioned more parking as the most common need.

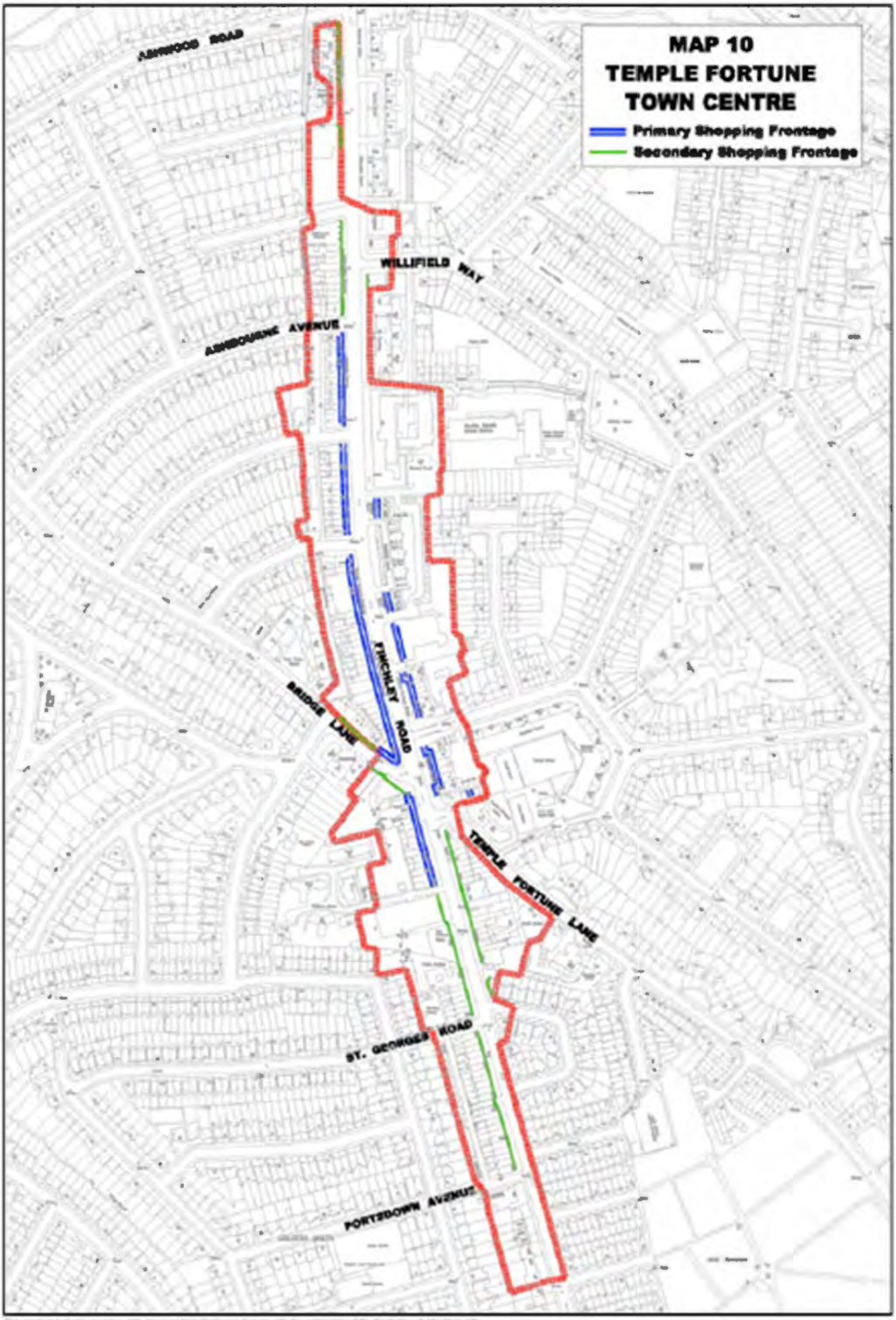


Retailer requirements	There is one current retailer requirement for Temple Fortune. This is from Caffé Nero, for 900-2,000 sq. ft.

Recommendations

Summary (SWOT)	**Strengths** ▪ Strong presence of more upscale national multiple convenience stores; ▪ Provision of quality independent cafes, restaurants and boutiques; ▪ Good range of comparison retailers for the scale of the centre; ▪ Quality of public realm;	**Weaknesses** ▪ Low provision of non-customer only off-street parking and some cluttering of on-street parking; ▪ Lower level of public transport accessibility level;
	Opportunities ▪ Continue to build upon restaurant, café and boutique offer to increase footfall; ▪ Enhance public transport linkages to increase accessibility to the centre; ▪ Refurbishment and enhancement of shopfronts.	**Threats** ▪ Possible failure to attract necessary footfall to periphery of high street to sustain operators ▪ Competition from more accessible centres and centres with wider choice of comparison operators;

Recommendation	**Good health** Overall the centre is an attractive place and is performing well due to the relatively strong presence of key upscale multiple retailers, a number of comparison retailers and the strong independent retails and cafes/ restaurant offer in a pleasant environment. Waitrose and M&S act as key attractors to the centre. Additionally, the food and drink and leisure offer increases dwell time in the centre and generates good levels of footfall to support independent retailers. Limited change to the centre has occurred since the previous study was undertaken and there are very limited re-development and reconfiguration opportunities currently. The centre is vital and viable although there is a risk of more residential development (either through conversion or new build) leading to potential contraction of the centre. Monitoring of office to residential changes will be necessary to ensure the future health of the centre.



MAP 10
TEMPLE FORTUNE
TOWN CENTRE
Primary Shopping Frontage
Secondary Shopping Frontage
WILLIFIELD WAY
ASHBOURNE AVENUE
FINCHLEY ROAD
BRIDGE LANE
TEMPLE FORTUNE LANE
ST. GEORGES ROAD
PORTSDOWN AVENUE

WHETSTONE (DISTRICT CENTRE)	Date of survey: 05/05/17



Uses by category

Category	No. of units	% of units	UK %	Floorspace (sq. m)	Floorspace (%)	UK %
Convenience	6	6.6	9.41	2110	15.3	18.34
Comparison	24	26.4	39.10	3220	23.3	44.18
Services	57	62.6	38.17	7120	51.5	25.84
Vacant	4	4.4	12.13	1380	10.0	10.71
Other	0	0.0	1.19	0	0.0	0.97
Total	91	100.0	100	13830	100.0	100

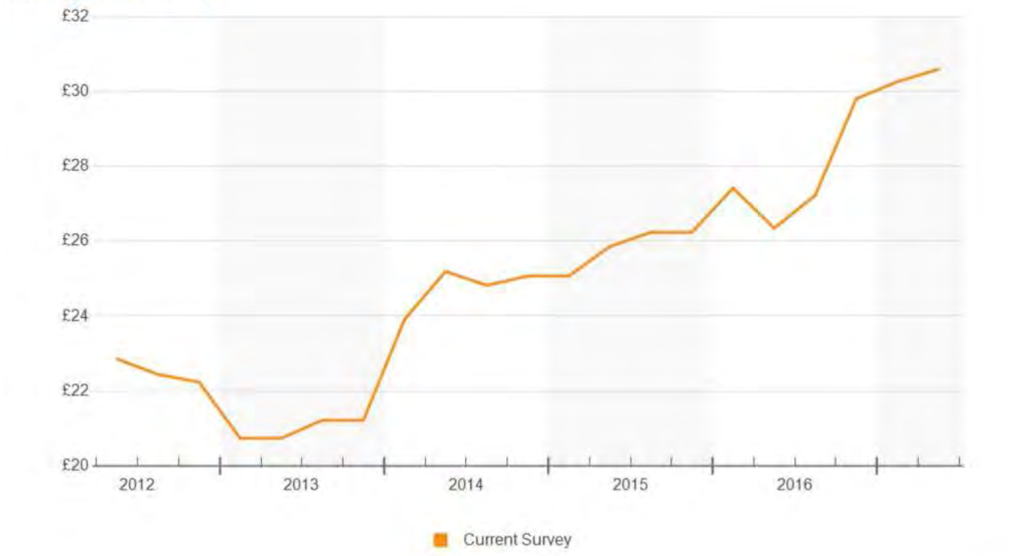
Diversity of uses & retailer representation

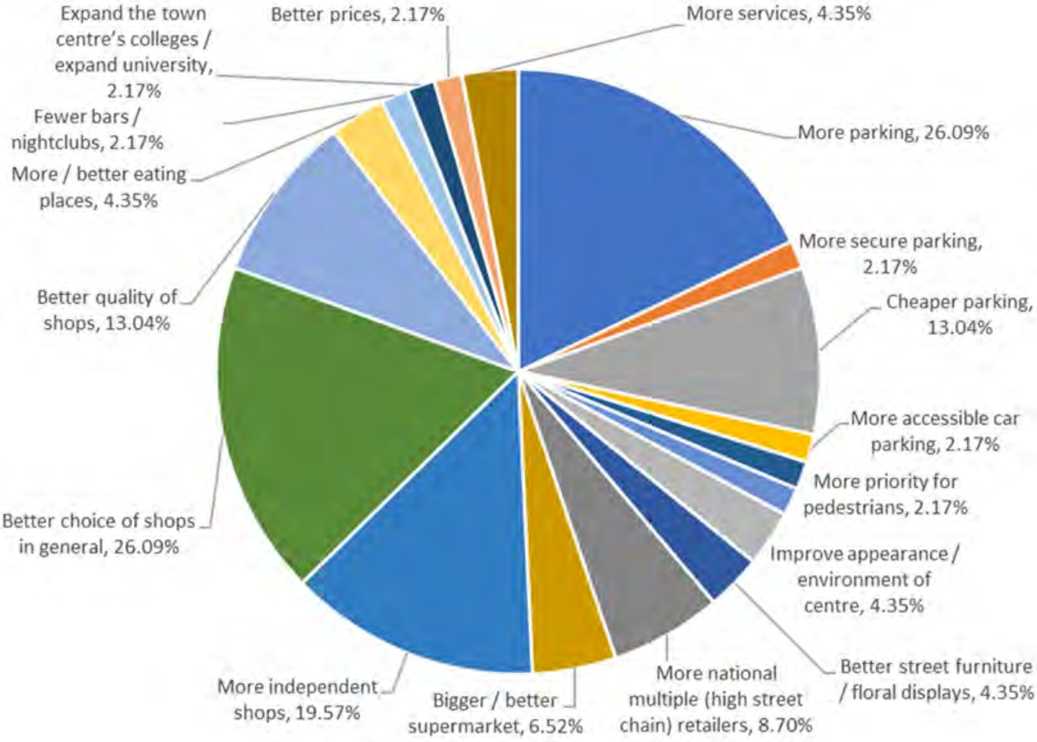
Foodstores	Waitrose is the main foodstore in Whetstone at 1,730 sq.m (gross) and is centrally located along High Road. A Marks & Spencer's Food Hall (1,400 sq.m gross) is also present at the northern end of the centre. Other convenience stores are limited except for two newsagents. Overall the level of convenience provision in Whetstone is slightly lower than the UK average.
National multiples	There is a limited representation from multiple comparison operators in Whetstone which is well below the UK average. Current provision includes Boots and Carpetright. Halfords is also present just outside of the centre, adjacent to Carpetright. National multiples food and drink operators present within the centre include Costa Coffee, Pizza Express and Subway. Aside from multiples, there is also limited independent comparison provision in Whetstone.
Other retail uses & markets	There are a number of independent café and restaurant, public houses, bars and hot food takeaways present in Whetstone. Banks currently represented in Whetstone are Barclays and NatWest. There are three estate agents spread through the centre, with Hunters being the only multiple. Whetstone currently has a monthly farmers market along High Road. There are three charity shops which are relatively clustered to the southern end of the centre. The clustering is not a cause for concern as the shop frontages are relatively small and situated close to Waitrose which presents an attractive frontage.
Evening economy	Evening economy uses in Whetstone include the restaurants, The Griffin public house, bars and hot food takeaways. There is also a Travelodge hotel located in the north of centre. Whetstone does not have a cinema or bowling alley.
Other services	Retail services are well represented with a small number of independent hairdressers and beauty salons, a dentist and Post Office. Other services include Council offices in Barnet House, just outside the centre boundary which is shortly due to be converted to residential flats. Leisure provision includes three yoga centres and a snooker hall.

Accessibility

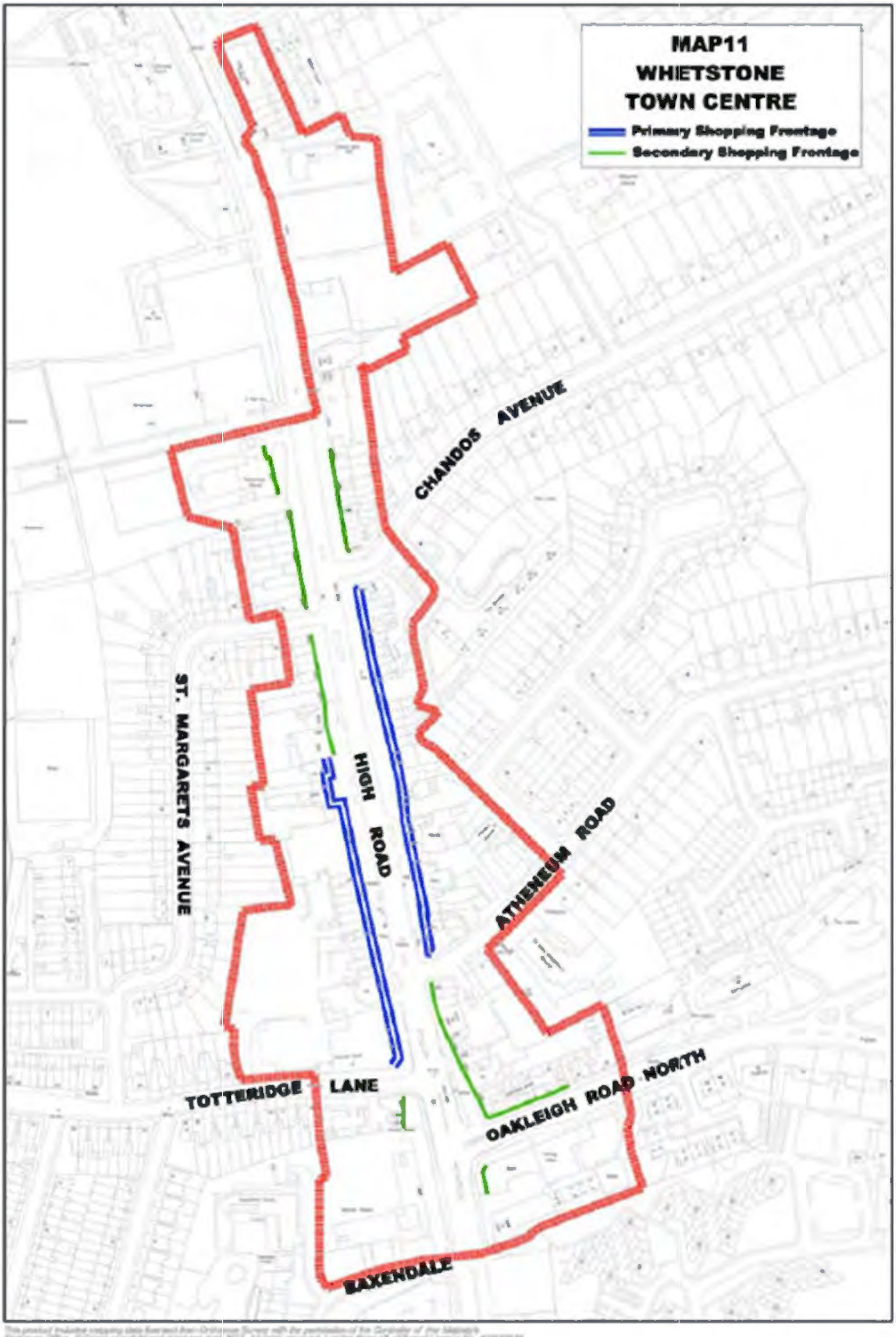
Public transport & PTAL rating	The Totteridge and Whetstone tube station is close to the Whetstone centre being located off Totteridge Lane. There are also numerous frequent bus services along High Road including 34, 263 – Barnet Hospital, 234, 326– The Spires, as well as Oakleigh Park). The centre has a PTAL rating of 4.
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.

Pedestrian linkages & disabled access	Whetstone has the benefit wide, flagged pavements which provide respite from the busy High Road. This allows unfettered pedestrian movement around the centre, in light of its linear nature. There are pedestrian crossings at key junctions along High Road. Whilst more pedestrian crossing points at key juncture would be welcome, this could adversely affect traffic flows. Most shops and businesses along High Road are able to achieve level access for wheelchair users, however a number still retain a stepped access.
Environmental quality	
Retail unit size & quality	The majority of retail units are small, reflecting the traditional linear character of the District Centre. A small number of larger units are present to accommodate the multiple retailers such as Waitrose. The M&S Foodhall and Carpetright units have the appearance of 'retail warehouse' building with very limited active frontage onto High Road. The shop frontages are of generally reasonable quality and are on the whole well maintained. This is assisted by a number of cafes being present which utilise the pavement area. Some units could benefit from restoration such as the Green Man Tyre and Exhaust centre.
Access to green space	Swan Lane open space (approx. 200m south of centre), Dame Alice Owens Ground, Brook Farm Open Space (approx. 5 mins walk from centre); Friary Park (approx. 15 mins walk from centre) and Whetstone Stray and allotment (approximately 500m south west of the centre)
Townscape & street furniture	Good. Wide pavements lined with large and mature trees. Some outside seating on pavements. Street furniture such as benches could be more prevalent. Plenty of litter bins. Some littering but generally clean.
Perception of safety & evidence of crime	No evidence of anti-social behaviour or crime was observed during our visit. Good natural surveillance from busy High Road, together with wide pavement reduces the perception that crime will occur.
Development opportunities & recent investment	Many development opportunities previously identified are now being taken forward for residential accommodation. This includes the former B&Q warehouse and the conversion of Northway House. Barnet House will also be shortly converted into residential accommodation. Substantial residential development underway at Sweets Way. In general, significant level of residential activity which may limit the level of potential future retail led developments. The former Bull & Butcher pub, despite several transformations, remains inactive.
Commercial yields	According to Co-Star, the five-year average yield for Whetstone is 4.1% which is low compared to the borough district centre average of 5.5% (2012-2017). This low yield level reflects generally strong investor confidence in the area. However, average figures can mask the greater variations in yield levels achieved in individual transactions so should be treated with some care.

<table>
<tr><td>Commercial rents</td><td>

22/05/2017
This copyrighted report contains research licensed to CoStar UK Ltd - 679303
According to Co-Star, asking rents in Whetstone have fluctuated between £20 and £30 per sq.ft over the past five years as shown in the graph. Asking rents have continued to rise since Q3 2013 and peaked in Q2 2017. This is a sign of increasing operator demand and suggests that the centres viability has improved in recent years. The Whetstone five-year average asking rent is £24.51 per sq.ft which is broadly in line with the borough district centre five-year average of £24.42 per sq.ft. However, average rent figures should be treated with a degree of caution since they can mask greater variations recorded in individual transactions</td></tr>
<tr><td>Customer views & behaviour</td><td>Of those that accessed Whetstone, 28.26% stated no improvements. Of those that did note improvements, the most mentioned improvements were a better choice of shops in general and more parking.

</td></tr>
<tr><td>Retailer requirements</td><td>According to Shopproperty there are two retailer requirements currently for Whetstone. Café Nero has a requirement for 85 sq. m gross and Aldi has a need for a store of approximately 1,500 sq. m gross. Whilst a relatively low number of retailer requirements, it should be noted that many retailers do not publish requirements and therefore there may be a latent demand that is not being captured.</td></tr>
</table>

<table>
<tr><th colspan="3">Recommendations</th></tr>
<tr><td rowspan="2">Summary (SWOT)</td><td>Strengths
▪ Strong food and drink offer, reflecting pleasant environment;
▪ Good pedestrian and public transport accessibility;
▪ Strong convenience anchor store (Waitrose).</td><td>Weaknesses
▪ Comparatively poor comparison shopping offer compared to other centres;
▪ Relatively limited new development opportunities available to meet identified requirements.
▪ Some buildings and uses currently detract from the quality of the centre including the Green Man Tyre and Exhaust centre, Euro House office building and the former pub.</td></tr>
<tr><td>Opportunities
▪ Current and emerging housing developments in centre attracting new footfall;
▪ Reap benefits from increasing asking rents in the centre to attract new quality operators and increase footfall.</td><td>Threats
▪ Proximity to other centres (i.e. North Finchley which provide stronger retail offer (particularly comparison);
▪ Loss of footfall due to conversion of office to residential.</td></tr>
<tr><td>Recommendation</td><td colspan="2">Good health
Overall the centre is performing well due to the relatively higher quality convenience provision, good quality – though limited – independent comparison retailers and the high level of cafes and restaurants. The latter help to maintain a pleasing environment complementing the wide tree lined pavements, despite the heavy traffic. Vacancies well below the national average. A potential concern is whether the new residents will boost footfall within the centre or whether a dormitory effect could be created. Overall the centre is vital and viable, however should the centre not be able to expand and improve its retail provision, there is a longer term risk of the status of the centre diminishing relative to others over time.</td></tr>
</table>


MAP11
WHIETSTONE
TOWN CENTRE
Primary Shopping Frontage
Secondary Shopping Frontage
CHANDOS AVENUE
ST. MARGARETS AVENUE
HIGH ROAD
ATHENEUM ROAD
TOTTERIDGE LANE
OAKLEIGH ROAD NORTH
BAXENDALE

LOCAL/ NEIGHBOURHOOD CENTRES

APEX CORNER (LOCAL CENTRE)	Date of survey: 31/05/2017

Diversity of uses

Category	No. of units	% of units	UK %	Floorspace sqm	Floorspace (%)	UK %
Convenience	1	3.3	9.41	110	3.2	18.34
Comparison	9	30.0	39.10	1230	35.8	44.18
Services	18	60.0	38.17	1970	57.3	25.84
Vacant	1	3.3	12.13	60	1.7	10.71
Other	1	3.3	1.19	70	2.0	0.97
Total	30	100.0	100	3440	100.0	100

Source: GOAD and PBA research

Diversity of uses & retailer representation

Retail, services, community uses & other uses	Convenience: Local pharmacy selling a range of convenience goods. Comparison: largely specialist offering including plumbing supplies, gentleman's suit shop, mobility and hearing equipment store, swimming pool suppliers, art shop, car/van hire, interior design, personal trainer, taxi hire, veterinary surgery Services: post office, estates agents, hairdressers/salons, independent restaurant & cafés, Vacancies: only one vacant unit so well below national average; no change from previous study.
National multiples	Ladbrokes, KFC.

Accessibility

PTAL	PTAL of 2. Regular bus services 113, 186, N113, 292, 614 and 644 to/from Edgware, Northwick Park Hospital, Brent Cross, Oxford Circus, Borehamwood, Rossington Avenue, Hatfield, Queensbury and Colindale Superstores. Mill Hill (Thameslink) station is located 1.2 km from the centre while Stanmore underground station is located 3.5 km to the west.
Car parking, pedestrian linkages & disabled access	No parking/stopping on the dual carriageways of Watford Way (A1), Edgware Way or Barnet Way, similarly no parking on Selvage Lane. Predominantly informal on-street parking with some undesignated 'lay-by' areas provided along Watford Way. Pedestrian access provided as underpasses through roundabout together with zebra crossing on Selvage Lane; however overall connectivity across the centre is poor. Limited/ no dedicated disabled facilities.

Environmental quality

Townscape, street furniture & green space	Townscape is poor. Pavements are wide and generally clean; although much is taken up by parked vehicles. Very limited provision of street planting and street furniture; could be enhanced throughout.
Perception of safety & evidence of crime	No evidence of anti-social behaviour or crime; although underpasses might be intimidating to some at night.
Development opportunities & recent investment	Recent investment: - Implementation/completion of H/02172/14 for three-storey self-storage building at the former Mill Hill Service Station Development opportunities: - None.
Commercial yields & rents	5 yr. average asking rent - £13.10 (Borough local centre average £22.28) 5 yr. average yield – n/a (Borough local centre average 6.7%)
Retailer requirements	No current retailer requirements

<table>
<tr><td rowspan="2">Summary (SWOT)</td><td>Strengths
▪ Low vacancy rate
▪ Strong specialist retail offer</td><td>Weaknesses
▪ Poor public transport accessibility
▪ Poor representation of national multiples;
▪ Indistinguishable townscape and lack of identity;
▪ Street parking creating poor pedestrian environment.</td></tr>
<tr><td>Opportunities
▪ Improvements to public realm (street furniture and planting);</td><td>Threats
▪ Proximity to Mill Hill district centre which has a better environment</td></tr>
<tr><td>Recommendation</td><td colspan="2">Moderate health
While there is a reasonably strong retail offer, there is a deficiency in the lack of convenience offer. The location of the centre adjacent to/incorporating the roundabout makes the environment challenging and as a result the townscape would benefit from enhancement. Despite these factors, vacancy rates are low, and as taking into consideration the context of the centre, overall it appears to be healthy.</td></tr>
</table>

CHILDS HILL (LOCAL CENTRE)	Date of survey: 31/05/2017



Uses by category

Category	No. of units	% of units	UK %	Floorspace sq.m	Floorspace (%)	UK %
Convenience	5	7.5	9.41	330	5.8	18.34
Comparison	16	23.9	39.10	1,550	27.1	44.18
Services	36	53.7	38.17	2,740	48.0	25.84
Vacant	10	14.9	12.13	1,090	19.1	10.71
Other	0	0.0	1.19	0	0.0	0.97
Total	67	100.0	100	5,710	100.0	100

Source: GOAD and PBA

Diversity of uses & retailer representation

Retail, services, community uses & other uses	Convenience: provision is below the national average, anchored by the Co-operative food and supplemented by a number of small independent food stores and off-licences. Comparison: provision is well below the national average, the comparison shopping offer is limited to a number of homeware stores and a specialist scuba shop. Services: provision is well above the national average and includes: estate agents, betting shops, dry cleaners, physiotherapists, motor store, taxi office and pharmacy. The food and drink offer is aimed towards the low to middle end of the market. Provision is dominated by local independent cafes and takeaways with a few restaurants. Nearby local community facilities include: All Saints' Church of England Primary School, Childs Hill Baptist Church and Childs Hill Park. Vacancies: ten vacant units, well above the national average.
National multiples	There are very few national multiple operators in Childs Hill which is not unusual for a centre of its size. National multiples present include: Costa, Co-operative Food and William Hill.

Accessibility

PTAL	Childs Hill is readily accessible by public transport which is reflected in the centres PTAL rating. The centre of Childs Hill has a PTAL rating of 4 while the peripheral areas have a PTAL rating of 5. The centre is well served by local buses to Golders Green, North Finchley and central London.
Car parking, pedestrian linkages & disabled access	On street parking is prevalent throughout the centre. Heavily to moderate traffic flows were observed on Cricklewood Lane/Finchley Road during PBAs site visit. Pavement width is generally acceptable throughout and pedestrian crossings at the A538/A407 junction aid pedestrian circulation throughout the centre. Additional pedestrian crossings along Cricklewood Lane/Finchley Road would improve the pedestrian experience.

Environmental quality

Townscape, street furniture & green space	The centre contains minimal street planting and seating. Litter bins are frequent and litter on the streets was minimal during the site visit. The building quality is variable- the centre contains some attractive older residential properties and new build residential units but some shop units appear neglected and the centre would benefit from the restoration of these units.
Perception of safety & evidence of crime	The centre felt generally safe and secure and we did not observe any observation of anti-social behaviour or crime during the site visit.
Development opportunities & recent investment	Recent investment: – New residential development on corner of Finchley Road and Hermitage Lane (452 Finchley Road) No further development opportunities have been identified.

CHILDS HILL (LOCAL CENTRE)		Date of survey: 31/05/2017
Commercial yields & rents	According to Co-Star, the five-year average rent for Childs Hill is £22.78 per sqft which is broadly in line with the borough local centre average of £22.28 per sqft. This rent level indicates moderate operator demand in the area however, average rent figures should be treated with a degree of caution since they can mask greater variations recorded in individual transactions. Co-Star does not provide five-year average yield data for Childs Hill.	
Retailer requirements	According to Shopproperty there are currently no published retailer requirements for Childs Hill however this should not be taken to mean that there is no demand for floorspace. This may be attributable to the fact that requirements are generally only published by national multiple operator's. The absence of retail requirements in Childs Hill reflects the nature of retail provision in the centre which contains a strong independent retail offer.	
Recommendations		
Summary (SWOT)	**Strengths** ▪ Concentration of building supply and DIY retailers increasing footfall; ▪ Provision of key local services; ▪ Recently developed and emerging housing development in the vicinity.	**Weaknesses** ▪ Lack of national multiples; ▪ Limited comparison retail offer; ▪ Relatively high vacancy rate; ▪ Gaps between retail units (for residential / commercial) creates incoherent centre. ▪ Convenience shopping offer is generally low quality.
	Opportunities ▪ Benefit from additional footfall created by new residential development; ▪ Improve quality of public realm through additional planting and street furniture.	**Threats** ▪ Lack of higher quality café and restaurant services to attract additional footfall to the centre; ▪ Lack of off-street parking could limit ability to attract additional footfall; ▪ Current on-street parking can give clustered appearance
Recommendation	**Moderate health:** Overall the centre is underperforming against a number of key indicators. The centre provides a good range of shops, services and community uses for its size although the quality of the convenience offer could be improved in terms of quality and diversity. Limited opportunities for new development are available however redevelopment of individual units to create modern high quality floorspace would benefit the centre and help to reduce the vacancy rate which is above the national average. Overall the centre is considered to fulfil its role as a local centre although the environment and quality of the retail offer could be improved.	

COLNEY HATCH LANE (LOCAL CENTRE)	Date of survey: 31/05/2017

Uses by category

Category	No. of units	% of units	UK %	Floorspace sqm	Floorspace (%)	UK %
Service	25	71.4	9.41	-	-	18.34
Convenience	6	17.1	39.10	-	-	44.18
Comparison	3	8.6	38.17	-	--	25.84
Vacant	1	2.9	12.13	-	-	10.71
Commerce	0	0.0	1.19	-	-	0.97
Total	35	100	100	-	-	100

Source: GOAD and PBA research

Diversity of uses & retailer representation	
Retail, services, community uses & other uses	Convenience: local food/ grocery stores, no national multiples, below national average Comparison: provision below national average, includes veterinary surgery, dry cleaners, pharmacy, Polish food store, chiropractic clinic Services: provision significantly above the national average including public library, hairdressers/ salon, restaurants/ cafes, public house (Minstrel Boy), takeaways, Ladbrokes betting shop, dental practice Vacancies: only one vacant unit so well below national average; and improvement from previous study with three vacancies.
National multiples	Ladbrokes.
Accessibility	
PTAL	PTAL 2 / 3. Regular bus services 43, 134, 634 to/from Tottenham Court Road, North Finchley and Friern Barnet.
Car parking, pedestrian linkages & disabled access	Some formal and informal on-street parking, with two formal disabled parking bays. Parking did not appear over-crowded / cluttered at time of visit.
Environmental quality	
Townscape, street furniture & green space	Streets appear cleaned and well maintained. Good provision of pedestrian crossings. Litter bins prevalent and littering minimal. Some provision of benches. Some shop fronts are less well maintained and could benefit from renovation.
Perception of safety & evidence of crime	No evidence of anti-social behaviour or crime.
Development opportunities & recent investment	**Recent investment:** - South Friern Library and 10 residential units on upper floors completed in 2009 **Development opportunities:** - None evident
Commercial yields & rents	5 yr. average asking rent - £21.02 (Borough local centre average £22.28) 5 yr. average yield – n/a (Borough local centre average 6.7%)
Retailer requirements	No current retailer requirements

<table>
<tr><th colspan="2">COLNEY HATCH LANE (LOCAL CENTRE)</th><th>Date of survey: 31/05/2017</th></tr>
<tr><th colspan="3">Recommendations</th></tr>
<tr><td rowspan="2">Summary (SWOT)</td><td>Strengths
▪ Low vacancy rate;
▪ New public library;
▪ Provision of key local services.</td><td>Weaknesses
▪ Lack of national multiple small supermarket;
▪ Weak comparison retail offer compared to other centres;
▪ Lack of formal off-street parking and relatively low public transport accessibility.</td></tr>
<tr><td>Opportunities
▪ Improve quality of public realm through new street planting and furniture;
▪ Maintain, and where relevant, enhance quality of townscape to attract new operators and increase footfall.</td><td>Threats
▪ Proximity to Tesco superstore at Colney Hatch Lane and other centres with stronger retail offer (e.g. Muswell Hill & Friern Barnet);
▪ Failure to sustain existing footfall due to completing centres.</td></tr>
<tr><td>Recommendation</td><td colspan="2">Good health
The centres strengths, the independent retail and service offer and low vacancy rate are good building blocks. The comparison offer is limited and would benefit from some improvement. Similarly, additional representation from national multiples could increase footfall in the centre; however, this needs to be balanced against any threats to the independent retailers and occupiers that currently underpin the centre. Improve and enhance townscape to attract new operators.</td></tr>
</table>

DEANSBROOK ROAD (LOCAL CENTRE)	Date of survey: 31/05/2017

Diversity of uses

Category	No. of units	% of units	UK %	Floorspace sqm	Floorspace (%)	UK %
Convenience	5	20.8	9.41	340	20.0	18.34
Comparison	3	12.5	39.10	210	12.4	44.18
Services	12	50.0	38.17	850	50.0	25.84
Vacant	4	16.7	12.13	300	17.6	10.71
Other	0	0.0	1.19	0	0.0	0.97
Total	24	100.0	100	1700	100.0	100

Source: GOAD and PBA research

Diversity of uses & retailer representation

Retail, services, community uses & other uses	Convenience: Londis (with ATM) and local food stores. Comparison: focused on lower-value comparison goods and largely made up of independent retailers. Below national average but not uncommon for scale of centre. Services: Post Office pharmacy, restaurants & cafés, hair salon, estate agents, William Hill, takeways, off licence, ATMs, dry cleaners Vacancies: Higher than the national average and an increase in two from the previous study.
National multiples	Willian Hill, Post Office, Londis

Accessibility

PTAL	PTAL 3. Regular bus services 302, 303, 618, 628 and 642 to/ from West Hendon Broadway, Colindale Superstores, Mill Hill Broadway and Southgate. Mill Hill Broadway train station located 900m north-east of the centre.
Car parking, pedestrian linkages & disabled access	Some informal on-street parking. Pavement is wide and good quality. Most of units have step free access. Zebra crossing and refuge point located at either end of parade.

Environmental quality

Townscape, street furniture & green space	Some littering despite litter bins. Minimal street furniture. No planting along parade; although but some greening provided by private front gardens on the opposite side. The nearest green space Lyndhurst Park (approximately 2 mins' walk from the centre).
Perception of safety & evidence of crime	No evidence of anti-social behaviour or crime.
Development opportunities & recent investment	None evident
Commercial yields & rents	5 yr. average asking rents - £22.77 psf (Borough local centre average £22.28) 5 yr. average yield – n/a (Borough local centre average 6.7%)
Retailer requirements	No current retailer requirements

DEANSBROOK ROAD (LOCAL CENTRE)		Date of survey: 31/05/2017
Recommendations		
Summary (SWOT)	**Strengths** ▪ Provision of key local services and location appropriate to provide services to surrounding residential development.	**Weaknesses** ▪ Lack of national multiples, particularly a food store; ▪ Lack of cafés and restaurants to attract leisure shoppers to centre; ▪ Relatively poor provision of comparison retailers.
	Opportunities ▪ Provide new street planting and furniture to improve quality of public realm; ▪ Establish local identity by independent retailers.	**Threats** ▪ Proximity to larger nearby (Mill Hill) offering greater variety of retail and leisure uses will curtail function; ▪ Failure to attract national multiples due to competition from larger nearby centres.
Recommendation	**Moderate health** While there is a reasonably strong retail offer, there are deficiencies arising from the lack of convenience anchor store and limited comparison and A3 offer. The fact that vacancy levels are high suggests available space is not fit for purpose and there are no clear opportunity sites to address this.	

EAST BARNET VILLAGE (LOCAL CENTRE)	Date of survey: 05/05/17



Diversity of uses

Category	No. of units	% of units	UK %	Floorspace sqm	Floorspace (%)	UK %
Convenience	8	10.0	9.41	1,600	23.5	18.34
Comparison	17	21.3	39.10	1,280	18.8	44.18
Services	49	61.3	38.17	3,630	53.3	25.84
Vacant	6	7.5	12.13	300	4.4	10.71
Other	0	0.0	1.19	0	0.0	0.97
Total	80	100	100	6,810	100	100

Source: GOAD and PBA

Diversity of uses & retailer representation	
Retail, services, community uses & other uses	Convenience: 670 sq.m (gross) Co-op, several newsagents and local convenience stores. Comparison: focused on lower-value comparison goods and largely made up of independent retailers. Below national average but not uncommon for scale of centre. Several charity shops Services: various, including Post Office, bank, veterinary surgery, public house, estate agents. community centre/hall, Brookside Methodist Church.
National multiples	Co-operative, Cancer Research, Costa Coffee, Barclays, Post Office, Ladbrokes
Accessibility	
PTAL	3
Car parking, pedestrian linkages & disabled access	Church Hill Road (70 spaces) (free). Good pedestrian accessibility around the centre: wide pavements and a number of pedestrian crossings.
Environmental quality	
Townscape, street furniture & green space	Good / very good. Buildings are good quality and generally well maintained. Well maintained public street planting at roundabout and good provision of benches and seating.
Perception of safety & evidence of crime	Good / very good. No evidence of antisocial behaviour or crime.
Development opportunities & recent investment	No evidence of recent development or investment within the centre, but recent ALDI application outside the centre boundaries.
Commercial yields & rents	Five-year average asking rent – £19.56 psf (borough local centre average £22.28) 5yr. average yield – 6.5% (Borough local centre average 6.7%)
Retailer requirements	No current retailer requirements listed.

Recommendations

Summary (SWOT)		
	Strengths ▪ Pleasant environment/public realm; ▪ Quality independent retailers; ▪ Concentration of key local services; ▪ Proximity to metropolitan open land (Oak Hill Park).	**Weaknesses** ▪ Weak comparison retail offer compared to other centres; ▪ Lack of strong national multiples; ▪ Relatively high vacancy rate.
	Opportunities ▪ Benefit from quality public realm and independent	**Threats** ▪ Proximity to other centres with stronger retail offer (i.e. Whetstone & New Barnet);

	retail offer to increase footfall; ▪ Establish unique place identify to distinguish town centre offer from other nearby centres.	▪ Failure to create place identify and footfall to attract popular national multiples; ▪ New out-of-centre convenience provision (ALDI).
Recommendation	**Good health** The centre's strengths, the independent retail offer and high quality environment, are good building blocks. The comparison offer is limited and would benefit from some improvement. Similarly, there are relatively few national multiples which could increase footfall in the centre; however, this needs to be balanced against any threats to the independent retailers and occupiers that currently underpin the centre.	

FRIERN BARNET (LOCAL CENTRE)	Date of survey: 05/05/17



Uses by category

Category	No. of units	% of units	UK %	Floorspace sqm	Floorspace (%)	UK %
Convenience	6	10.3	9.41	990	20.6	18.34
Comparison	9	15.5	39.10	670	13.9	44.18
Services	41	70.7	38.17	3,050	63.4	25.84
Vacant	2	3.4	12.13	100	2.1	10.71
Other	0	0.0	1.19	0	0.0	0.97
Total	58	100	100	4,810	100.0	100

Source: GOAD and PBA

Diversity of uses & retailer representation	
Retail, services, community uses & other uses	Convenience: The convenience offer is anchored by the Co-operative food and Tesco Express and supplemented by a number of off-licences and a specialist wine merchant. Comparison: the comparison shopping offer includes a number stores selling homeware, electronics and furniture and a specialist bike shop. Services: provision is well above the national average and includes: laundrette, beauty salon, dry cleaners, veterinary surgery, computer repair centre and printing/copying shop. The food and drink the offer comprises a good mix of local independent cafes and restaurants orientated towards the middle of the market as well as a number of takeaways. Nearby local community facilities include: Friern Barnet Medical Centre, Apple Day Nursery, Dwight School London and Friary Park. Vacancies: two vacant units, significantly below the national average.
National multiples	There are very few national multiple operators in Friern Barnet which is not unusual for a centre of its size. National multiples present include: Tesco Express, Co-operative food and Lloyds Pharmacy.
Accessibility	
PTAL	Friern Barnet is accessible by public transport which is reflected in the centres PTAL rating of 3. The centre is served by local buses to Highgate and central London. The nearest rail station, New Southgate, is located 1.7km to the east of the centre.
Car parking, pedestrian linkages & disabled access	Ample on-street car parking is provided along Woodhouse Road and Woodleigh Avenue. Pedestrian accessibility along Woodhouse Road is constrained by the wide roads, on-street parking and lack of pedestrian crossings. Currently there is just one signalised pedestrian crossing on Woodhouse Road.
Environmental quality	
Townscape, street furniture & green space	Moderate quality street furniture and planting and good provision of cycle parking throughout the centre. Litter bins are prevalent and minimal littering was observed during the site visit. The building quality is variable throughout- there are a number of attractive properties including the Alderman Court building, though a number of shops could at the eastern end of the centre were not well kept.
Perception of safety & evidence of crime	The centre felt generally safe and secure and we did not observe any observation of anti-social behaviour or crime during the site visit.
Development opportunities & recent investment	No evidence of recent investment or obvious opportunities for development.

<table>
<tr><td>Commercial yields & rents</td><td colspan="2">According to Co-Star, the five-year average rent for Friern Barnet is £22.35 per sqft which is broadly in line with the borough local centre average of £22.28 per sqft. This rent level indicates moderate operator demand in the area however, average rent figures should be treated with a degree of caution since they can mask greater variations recorded in individual transactions. Co-Star does not provide five-year average yield data for Friern Barnet.</td></tr>
<tr><td>Retailer requirements</td><td colspan="2">According to Shopproperty there are currently no published retailer requirements for Friern Barnet however this should not be taken to mean that there is no demand for floorspace. This may be attributable to the fact that requirements are generally only published by national multiple operator’s. The absence of retail requirements for Friern Barnet reflects the nature of retail provision in the centre which contains a strong independent
retail offer.</td></tr>
<tr><td colspan="3">Recommendations</td></tr>
<tr><td rowspan="2">Summary (SWOT)</td><td>Strengths
▪ Concentration of key local services;
▪ Variety of independent retailers;</td><td>Weaknesses
▪ Busy road junction and poor pedestrian accessibility;
▪ Weak comparison retail offer;
▪ Lack of strong national multiples;</td></tr>
<tr><td>Opportunities
▪ Establish local identity building on independent retailers;
▪ Utilise parking side road of Woodhouse Road to reduce street parking and provide improvements to public realm / pedestrian environment;</td><td>Threats
▪ Proximity to Tesco superstore at Colney Hatch Lane and other centres with stronger retail offer (i.e. Whetstone & New Barnet);
▪ Inability to attract popular national multiples;</td></tr>
<tr><td>Recommendation</td><td colspan="2">Good health: Friern Barnet is performing well against most indicators. The centre provides a good range of shops, services and community uses for its size. Interventions to improve pedestrian accessibility and improve the appearance of run down shop fronts would improve the overall performance of the centre. Overall the centre is considered to fulfil its role in the retail hierarchy as a local centre.</td></tr>
</table>

GOLDERS GREEN ROAD (LOCAL CENTRE)	Date of survey: 31/05/17



Uses by category

Category	No. of units	% of units	UK %	Floorspace sqm	Floorspace (%)	UK %
Convenience	11	24.4	9.41	2,629	50.5	18.34
Comparison	7	15.6	39.10	418	8.0	44.18
Services	20	44.4	38.17	1,308	25.1	25.84
Vacant	7	15.6	12.13	851	16.3	10.71
Other	0	0.0	1.19	0	0.0	0.97
Total	45	100	100	5,206	100	100

Diversity of uses & retailer representation

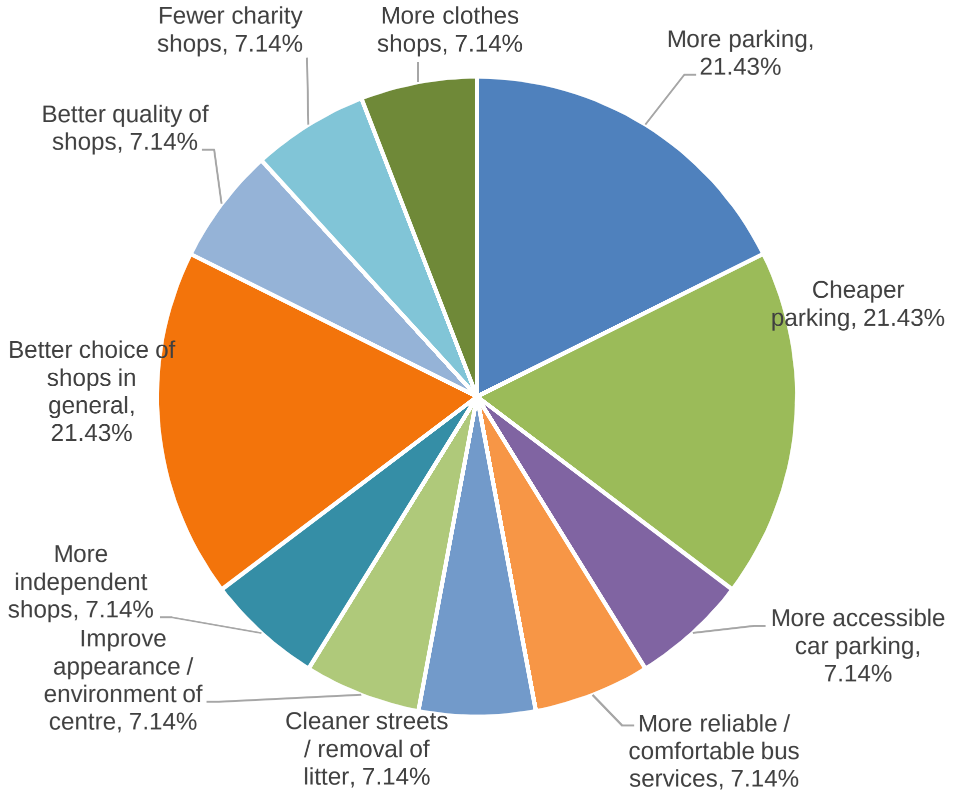
Retail, services, community uses & other uses	Convenience: extensive range of independent food retailers including butchers/delis, bakery and greengrocers, as well as ethnic and small-scale convenience stores. Comparison: comprised of independents including pharmacy, gift shops, stationers, men's clothing and children's clothing shops. Services: wide range including estate agents, nail bar, opticians, hairdressers, dry cleaners, restaurants and cafés but also several takeaways, nursery Vacancies: above national average - largely comprising small units but three in excess of 100 sq.m
National multiples	William Hill, Domino's

Accessibility

PTAL	4
Car parking, pedestrian linkages & disabled access	No off-street parking. Some on-street parking. Golders Green Road is a busy A road; while there are several pedestrian crossings, the pedestrian environment could be improved to reduce dominance of the road.

Environmental quality

Townscape, street furniture & green space	Town has moderate townscape quality. Pavements are wide and generally clean. Some provision of street planting (trees line street), but this could be improved. A significant number of shops were closed at time of visit (survey time 14:30) but buildings on northeast side appear neglected and could benefit from restoration.
Perception of safety & evidence of crime	No evidence of crime or anti-social behaviour.
Development opportunities & recent investment	Recent investment: • Maurice and Vivienne Wohl Campus (nursing home and independent living apartments) Development opportunities: • Other than reusing vacant properties, no evident opportunities
Commercial yields & rents	Five-year average asking rent - £29.38 psf (borough local centre average £22.28) Five-year average yield – 11.4% (borough local centre average 6.7%)
Customer views & behaviour	Of those that identified Golders Green Road as their main local centre in the household survey results, 21.43% felt that no changes were needed. However, those that did noted the need for improvements mentioned cheaper parking, more parking, and a better choice of shops in general. It should be noted that only 14 people identified this as their nearest centre, so the sample size is small.

GOLDERS GREEN ROAD (LOCAL CENTRE)		Date of survey: 31/05/17
		
Retailer requirements	There are seven current retailer requirements, ranging from 800 sq. ft. to 15,500 sq. ft. Requirements from national multiples include Shoe Zone Ltd, Travelodge, Argos and Aldi.	
Recommendation		
Summary (SWOT)	**Strengths** ▪ Strong local services provided by independent operators;	**Weaknesses** ▪ Lack of national multiples, particularly a food store; ▪ Lack of cafés and restaurants to attract leisure shoppers to centre; ▪ Relatively poor provision of comparison retailers.
	Opportunities ▪ Retailer requirements demonstrate demand for retail floor space in the centre. ▪ Improvements to public realm (street furniture and planting); ▪ Additional footfall in the centre from new residential development	**Threats** ▪ Proximity to larger nearby (Golders Green district centre) offering greater variety of retail and leisure uses will curtail function; ▪ Failure to attract national multiples due to competition from larger nearby centres.
Summary	**Moderate health** While there is a reasonably strong retail offer, there are deficiencies arising from the lack of convenience anchor store and limited comparison and A3 offer. Although it is encouraging that there are a number of retailer requirements which could resolve some of these issues, the fact that vacancy levels are high suggests available space is not fit for purpose and there are no clear opportunity sites to address this.	

GRAHAME PARK (LOCAL CENTRE)	Date of survey: 31/05/2017


Diversity of uses & retailer representation	
Retail, services, community uses & other uses	Grahame Park is a neighbourhood centre embedded within 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. The Grahame Park SPD was adopted in May 2016 and updates the previous Grahame Park masterplan. An outline planning application (ref number 17/2840/OUT) for the demolition of the estate and provision of 1083 dwellings and re-provision of community hub, 340 sq. m (GIA) of retail space (predominantly A1 along with A2, A3, A4 and/or A5) and 55 sq/m flexible use (use class A1 or B1) associated development and landscaping, was submitted in May 2017 and is yet to be determined. This will re-provide the retail and community facilities within the new residential development. In light of the application being in outline, the details of the units are not yet available however it is understood that retail and other services are likely to be spread across development blocks rather than providing a purpose built new centre.
National multiples	None
Accessibility	
PTAL	Mostly PTAL 2. PTAL 1a/1b on east. Regular bus services on Quakers Court 186, 204, 303 and N5 to/from Northwick Park Hospital, Edgware, Brent Cross, Colindale Superstores and Sudbury.
Car parking, pedestrian linkages & disabled access	Centre is currently pedestrianised with no vehicular access. Car parking is provided adjacent to the centre at Quakers Court, although this appears to be residents of the estate only.
Environmental quality	
Townscape, street furniture & green space	Generally poor. Trees & street furniture. Many shops appear to be closed during normal working hours. Pavement is in need of maintenance.
Perception of safety & evidence of crime	The poor quality of the built environment creates a poor impression and that anti-social behaviour could occur, despite not being evident on our visit: however, this may improve in the future with the planned regeneration of Douglas Bader estate.
Development opportunities & recent investment	Recent investment: - None. Development opportunities: - Outline application for redevelopment of estate and centre submitted (ref 17/2840/OUT) in May 2017.
Commercial yields & rents	No data available.

Retailer requirements	No current retailer requirements	
Recommendations		
Summary (SWOT)	**Strengths** ▪ Quiet and enclosed open space away from traffic	**Weaknesses** ▪ Lack of national multiples ▪ Poor quality building stock and public realm ▪ Limited relationship with external context
	Opportunities ▪ Redevelopment to provide modern purpose built retail units to serve local community.	**Threats** ▪ Inability to attract national multiples ▪ Diminishing quality of building stock and units due to failure to attract significant footfall.
Recommendation	**Significantly underperforming** Currently performing poorly based on limited offer, poor shopping environment. Whilst the redevelopment proposals have the potential to transform site into a new local centre, we understand that retail and service provision is likely to be spread across various phases of the redevelopment rather than the specific provision of a new centre. Monitoring of the proposals is necessary to understand whether Grahame Park will function as a local centre in the future.	

GREAT NORTH ROAD (LOCAL CENTRE)	Date of survey: 05/05/17

Diversity of uses

Category	No. of units	% of units	UK %	Floorspace sq.m	Floorspace (%)	UK %
Convenience	4	10.0	9.41	750	9.0	18.34
Comparison	6	15.0	39.10	650	7.8	44.18
Services	27	67.5	38.17	5,510	66.3	25.84
Vacant	2	5.0	12.13	360	4.3	10.71
Other	1	2.5	1.19	1,040	12.5	0.97
Total	40	100	100	8,310	100	100

Source: GOAD and PBA research

Diversity of uses & retailer representation	
Retail, services, community uses & other uses	Convenience: Tesco Express (370 sqm), butchers, greengrocers Comparison: provision below national average, includes a pharmacy, charity shop and interiors shops Services: extensive offer including estates agents, hairdressers/salons, opticians, restaurants, cafes, takeaways and public houses, Everyman Cinema, Jobcentre. Vacancies: only two vacant units so well below national average.
National multiples	Tesco Express, Costa Coffee, Ladbrokes
Accessibility	
PTAL	4
Car parking, pedestrian linkages & disabled access	Free street parking on Western Parade (see images). Closest off street parking is High Barnet Station (Pay) (155 spaces) (9 minutes' walk away)
Environmental quality	
Townscape, street furniture & green space	Trees lined pavements and some benches although these could be more prevalent. Good street planting at Station Road/Great North Road intersection. Planting could be enhanced throughout. Minimal littering.
Perception of safety & evidence of crime	No evidence of antisocial behaviour or crime.
Development opportunities & recent investment	Recent investment or development – Everyman took over the Odeon cinema in 2015. Opportunity at Raydean House and parking area to the rear could be developed.
Commercial yields & rents	Five-year average rent - £22.60 psf (Borough local centre average £22.28) Five-year average yield – 2.8% (Borough local centre average 6.7%)
Retailer requirements	No current retailer requirements listed.

Summary (SWOT)	Strengths	Weaknesses
	▪ Strong retail, service and leisure provision; ▪ Everyman Cinema attracting footfall to centre; ▪ Quantity/quality of independent retailers.	▪ Poor representation of national multiples; ▪ Indistinguishable townscape and lack of identity; ▪ Street parking creating poor pedestrian environment.
	Opportunities	**Threats**
	▪ Explore options for redevelopment at Raydean House and rear; ▪ Explore opportunity for pedestrianisation of Western Parade & removal / relocation of parking to enhance townscape and pedestrian experience.	▪ Proximity to other centres offering with superior retail / service offer; ▪ Diminishing quality of building stock and units due to failure to attract significant footfall.

GREAT NORTH ROAD (LOCAL CENTRE)	Date of survey: 05/05/17
Recommendation	**Good health** Strong retail, leisure and service offer in the centre, as well as low vacancies, mean Great North Road is performing well against its role as a local centre. There is scope for some enhancement, particularly in terms of multiple retailers but over the centre appears to be healthy. While the centre is located on the Great North Road, the majority of shops and services are located on Western Parade so set back from the main road and therefore a more pleasant pedestrian environment.

HALE LANE (LOCAL CENTRE)	Date of survey: 31/05/17


Uses by category

Category	No. of units	% of units	UK %	Floorspace sq.m	Floorspace (%)	UK %
Convenience	5	11.9	9.41	350	8.3	18.34
Comparison	7	16.7	39.10	530	12.5	44.18
Services	27	64.3	38.17	2870	67.7	25.84
Vacant	1	2.4	12.13	70	1.7	10.71
Other	2	4.8	1.19	420	9.9	0.97
Total	42	100.0	100	4240	100.0	100

Diversity of uses & retailer representation	
Retail, services, community uses & other uses	Convenience offer limited but including one local convenience store. Comparison offer substantially below national average but not uncommon for a smaller centre. Service offer strong; including acupuncture centre, estate agents, barbers, dry cleaners, takeaways, cafés and restaurants.
National multiples	Ladbrokes, Harvester
Accessibility	
PTAL	2
Car parking, pedestrian linkages & disabled access	Harvester car park (customer only). Some on-street parking. Centre established around the round-about. Zebra crossings provide good accessibility across roads.
Environmental quality	
Townscape, street furniture & green space	Townscape is moderate / poor. Some buildings are shop fronts appear neglected and would benefit from restoration. Good provision of litter bins, however littering is evident.
Perception of safety & evidence of crime	Good. No evidence of anti-social behaviour or crime.
Development opportunities & recent investment	None evident
Commercial yields & rents	Five-year average rents - £21.55 psf (borough local centre average £22.28) Five-year average yield – n/a
Customer views & behaviour	Insufficient responses from household survey. This is likely to be as a consequence of the proximity to Mill Hill, with respondents citing that as their main/nearest destination.
Retailer requirements	No current retailer requirements listed.

Recommendations

Summary (SWOT)		
	Strengths ▪ Low vacancy rate; ▪ Variety of local independent retailers providing key local services;	**Weaknesses** ▪ Poor accessibility by public transport; ▪ Lack of provision of strong national multiples, particularly a supermarket; ▪ Lack of street planting and furniture;
	Opportunities ▪ Enhance the local identity by independent retailers;	**Threats** ▪ Loss of footfall to larger centres nearby (e.g. Mill Hill), offering greater variety

HALE LANE (LOCAL CENTRE)		Date of survey: 31/05/17
	▪ Improve quality of public realm through provision of street furniture and planting; ▪ Attract supermarket chain to provide anchor store to the centre.	of retail / leisure uses; may limit potential to secure supermarket as an anchor store to the centre.
Recommendation	**Moderate health** The centre fulfils a local shopping and service function in line with its local designation. Its function is limited by the centre's proximity to Mill Hill as a district centre with a wider offer and greater accessibility. This could be improved but a careful balance needs to be struck with the independent retail offer. Given the centre's location around the junction of several major roads, it would benefit from public realm improvements to reduce the dominance of traffic and allow better pedestrian movement around the centre.	

HAMPDEN SQUARE (LOCAL CENTRE)	Date of survey: 31/05/17

Diversity of uses

Category	No. of units	% of units	UK %	Floorspace sqm	Floorspace (%)	UK %
Convenience	6	13.6	9.41	809	19.9	18.34
Comparison	11	25.0	39.10	706	17.4	44.18
Services	23	52.3	38.17	2,252	55.5	25.84
Vacant	4	9.1	12.13	291	7.2	10.71
Other	0	0.0	1.19	0	0.0	0.97
Total	44	100	100	4,058	100	100

Source: GOAD and PBA research

Diversity of uses & retailer representation

Retail, services, community uses & other uses	Convenience: Tesco Express (259 sq.m gross), Londis (149 sq.m gross) and several independent convenience retailers. Although the number of units is above national average, the unit sizes are small such that the floorspace for convenience goods is below national average. Comparison: as well as a pharmacy, the non-food offer includes a number of interiors shops (windows, kitchen and bedrooms, doors, curtains) and higher-value comparison shops e.g. wedding dresses and ladieswear shops. But overall, the non-food offer is below the national average. Services: strong offer including restaurants and cafes, beauty clinic, takeaways, public house, veterinary surgery, pottery studio Vacancies: below national average and comprising units of less than 100 sq.m.
National multiples	Pizza Hut, Tesco Express, Post Office, Londis

Accessibility

PTAL	2
Car parking, pedestrian linkages & disabled access	Osidge Lane (34 spaces, free).

Environmental quality

Townscape, street furniture & green space	Building and shop units are generally well maintained. Good provision of street furniture (benches, bins, signage). Ample street planting and grassed areas, on roundabout and street fronts. Overall, this creates a good townscape and quality of public realm.
Perception of safety & evidence of crime	No evidence of anti-social behaviour or crime.
Development opportunities & recent investment	None evident
Commercial yields & rents	Five-year average rent - £17.54 psf (borough local centre average £22.28) Five-year. average yield – data not available
Customer views & behaviour	Insufficient responses from household survey. This may be as a result of the location of the centre near the larger, more attractive centres of Southgate or East Barnet.

<table>
<tr><th colspan="2">HAMPDEN SQUARE (LOCAL CENTRE)</th><th>Date of survey: 31/05/17</th></tr>
<tr><td>Retailer requirements</td><td colspan="2">No current retailer requirements listed.</td></tr>
<tr><td colspan="3">Recommendations</td></tr>
<tr><td rowspan="2">Summary (SWOT)</td><td>Strengths
▪ Quality of public realm (provision of street furniture and planting);
▪ Concentration of key local services serving a largely residential catchment.</td><td>Weaknesses
▪ Weak comparison retail offer compared to other centres;
▪ Lack of presence of strong national multiples;
▪ High number of takeaways and limited restaurants and cafes to encourage longer dwell-times in the centre.</td></tr>
<tr><td>Opportunities
▪ Benefit from quality public realm and independent retail offer to increase footfall;
▪ Attract quality restaurant and café operators to increase leisure use in the centre.</td><td>Threats
▪ Proximity to larger centres offering stronger and more varied retail offer;
▪ Failure to attract restaurant and café operators due to competition from larger centres.</td></tr>
<tr><td>Recommendation</td><td colspan="2">Moderate health
The presence of two national multiples in the centre will serve to drive convenience footfall in the centre. The high quality public realm also strengthens the role of the local centre.
Although vacancies in the centre are low, there is limited scope for further development or investment and no evidence of unsatisfied retailer/operator requirements. Diversification of the service offer away from takeaways towards A3 and A4 operators could also have the effect of increasing dwell-time in the centre.</td></tr>
</table>

HOLDERS HILL CIRCUS (LOCAL CENTRE) — Date of survey: 31/05/17

Uses by category

Category	No. of units	% of units	UK %	Floorspace sq.m	Floorspace (%)	UK %
Convenience	7	21.9	9.41	2,590	55.9	18.34
Comparison	5	15.6	39.10	400	8.6	44.18
Services	20	62.5	38.17	1,640	35.4	25.84
Vacant	0	0.0	12.13	0	0.0	10.71
Other	0	0.0	1.19	0	0.0	0.97
Total	32	100.0	100	4,630	100.0	100

Source: GOAD/PBA

Diversity of uses & retailer representation

Retail, services, community uses & other uses	Convenience: strong provision including Costcutter (180 sq.m gross) and a large edge-of-centre Waitrose (1,980 sq.m gross), as well as an independent butcher, fishmonger and greengrocer. Because of the large Waitrose, the convenience offer accounts for over 50% of the centre's floorspace i.e. well above national average. Comparison: limited offer include pet shop and several independent homewares shops. Services: includes a range of restaurants and cafés, dry cleaner, tattoo parlour, hair salons and estate agents. No banks or building societies within the centre. Vacancies: none
National multiples	Coral, Costcutter

Accessibility

PTAL	2-3
Car parking, pedestrian linkages & disabled access	Waitrose (200 spaces, free, customers only), Mill Hill East Station (40 spaces, Pay). Some on street parking in the centre.

Environmental quality

Townscape, street furniture & green space	Townscape quality is good; however, the location of the centre around the Circus does result in fragmented provision. Pavements are wide and good quality. Bins and frequent and littering is minimal. Planting on roundabout provides positive contribution to public realm. Street furniture such as benches, and street planting is limited.
Perception of safety & evidence of crime	Good. No evidence of crime or anti-social behaviour.
Development opportunities & recent investment	Recent investment: new residential development on southwestern side of roundabout Development opportunities: none evident
Commercial yields & rents	Five-year average rents - £29.70 psf (borough local centre average £22.28) Five-year average yield – n/a
Customer views & behaviour	Insufficient responses from household survey. This is likely to be because respondents instead made comments on Finchley Church End.
Retailer requirements	No current retailer requirements listed.

Recommendations

	Strengths	Weaknesses
Summary (SWOT)	▪ No vacancies	▪ Relatively low public transport accessibility;

HOLDERS HILL CIRCUS (LOCAL CENTRE)		Date of survey: 31/05/17
	▪ Provision of independent operators providing key local services. ▪ Strong convenience provision with anchor store driving footfall	▪ Units on Bittacy Hill are detached from remainder of centre by residential dwellings; ▪ Limited offer of quality restaurant / cafes to increase dwell time in the centre
	Opportunities ▪ Additional footfall brought in by new residential development; ▪ Improve townscape and quality of public realm through provision of street furniture and planting.	**Threats** ▪ Proximity to larger centre which provides wider variety of shops / services (Finchley Church End) ▪ Failure to capitalise on footfall to the edge-of-centre Waitrose Langstone Way store
Recommendation	**Healthy** The centre is performing well with no vacancies and strong rents. It appears to benefit from the proximity of an edge-of-centre Waitrose store but this does add to the dispersed feel of the centre along Bittacy Hill. However, because there are no vacancies within the centre, there would be no justification for any alteration to the boundaries to focus the centre to north of Holders Hill Circus.	

MARKET PLACE (LOCAL CENTRE)	Date of survey: 31/05/2017


Uses by category

Category	No. of units	% of units	UK %	Floorspace sq.m	Floorspace (%)	UK %
Convenience	6	9.8	9.41	700	12.9	18.34
Comparison	14	23.0	39.10	1780	32.8	44.18
Services	30	49.2	38.17	2160	39.8	25.84
Vacant	9	14.8	12.13	630	11.6	10.71
Other	2	3.3	1.19	160	2.9	0.97
Total	61	100	100	5430	100	100

Diversity of uses & retailer representation

Retail, services, community uses & other uses	Convenience: provision below national average, includes a mix of quality independent food stores, specialist stores and off-licences. Comparison: provision below national average, includes pharmacy, furniture, homeware, interior design and ladies wear stores. Food and drink: good mix of cafes and restaurants orientated towards the middle to higher end of the market. Services: well above the national average, extensive range of services: Pilates studio, surveyors, building society, dry cleaners, banks, hairdressing and beauty salons. Vacancies: nine vacant units, slightly above the national average.
National multiples	There are very few national multiple operators in Market Place which is not unusual for a centre of its size. National multiples present include: WH Smith Local, Barclays and the Post Office.

Accessibility

PTAL	Market Place is not easily accessible by public transport which is reflected in the centres PTAL rating of 2 with some peripheral areas rated as 1b. The centre is served by direct local buses to Golders Green, Brent Cross and Edmonton Green. The nearest underground station, East Finchley, is located 1.3km to the north east of the centre.
Car parking, pedestrian linkages & disabled access	On-street car parking is provided along Falloden Way. The nearest off-street parking is East Finchley Station (267 spaces) (pay) approximately 20 mins walk from Market Place. Heavy traffic flows observed along the dual carriageway act as a barrier to pedestrian connectivity, though pedestrian crossings are frequent. Disabled access generally good with level access to most shops.

Environmental quality

Townscape, street furniture & green space	Pavements are wide and generally of good quality throughout the whole centre. Trees line the central reservation and pavements which enhance the quality of the public realm. The nearest green space is Lyttelton Playing Fields and Northway Gardens. The building quality is generally good. The building stock is mainly comprised of three storey units with retail at ground floor level and residential on the upper floors.
Perception of safety & evidence of crime	The centre felt generally safe and secure and we did not observe any observation of anti-social behaviour or crime during the site visit.
Development opportunities & recent investment	Recent investment: - Recent development at Lyttleton House; No further development opportunities identified.

MARKET PLACE (LOCAL CENTRE)		Date of survey: 31/05/2017
Commercial yields & rents	According to Co-Star, the five-year average rent for Market Place is £25.94 per sq.ft which is significantly higher than the borough local centre average of £22.28 per sq.ft. This rent level indicates strong operator demand in the area however, average rent figures should be treated with a degree of caution since they can mask greater variations recorded in individual transactions. Co-Star does not provide five-year average yield data for Market Place.	
Customer views & behaviour	Insufficient responses from household survey.	
Retailer requirements	According to Shopproperty there are currently no published retailer requirements for Market Place however this should not be taken to mean that there is no demand for floorspace. This may be attributable to the fact that requirements are generally only published by national multiple operator's. The absence of retail requirements for Market Place reflects the nature of retail provision in the centre which contains a strong independent retail offer.	
Recommendations		
Summary (SWOT)	**Strengths** ▪ Relatively good quality streetscape; ▪ Proximity to green space; ▪ Provision of key local services.	**Weaknesses** ▪ Busy road and poor public transport accessibility; ▪ Lack of strong national multiples; ▪ Poor connection across streets;
	Opportunities ▪ Increase public transport accessibility to increase footfall; ▪ Attract new independent retailers and national multiples to attract footfall.	**Threats** ▪ Failure to attract additional footfall due to busy street and poor pedestrian environment; ▪ Poor quality townscape and possible low footfall failing to attract national multiples and quality operators.
Recommendation	**Good health:** Market Place is considered to perform well in terms of its role as a local centre. The centre contains a good range of convenience stores and an extensive range of services with many high quality independent operators. The centre is visually attractive owing to the quality of the building stock and proximity to open green space. Interventions to reduce the vacancy rate, which is slightly above average, would improve the vitality and viability of the centre.	

NEW SOUTHGATE (LOCAL CENTRE)	Date of survey: 05/05/17

Diversity of Uses

Category	No. of units	% of units	UK %	Floorspace sqm	Floorspace (%)	UK %
Service	12	66.7	9.41	-	-	18.34
Convenience	2	11.1	39.10	-	-	44.18
Comparison	3	16.7	38.17	-	-	25.84
Vacant	1	5.6	12.13	-	-	10.71
Commerce	0	0.0	1.19	-	-	0.97
Totals	18	100.0	100	-	-	100

Source: GOAD and PBA research

Diversity of uses & retailer representation

Retail, services, community uses & other uses	Convenience: Co-operative and local convenience store Comparison: provision below national average, includes pharmacy, veterinary surgery, local scooter shop Services: including restaurants & cafes, chemist, betting offices, public houses, taxi office, beauty salon. Vacancies: one vacant unit, below national average, increase of one since last survey.
National multiples	Co-operative foodstore

Accessibility

PTAL	PTAL 5. New Southgate train station 200m south of centre. Regular bus services 221 and 382 to/from Southgate, Turnpike Lane Station, Edgware, North Finchley and Mill Hill East available on Friern Barnet Road.
Car parking, pedestrian linkages & disabled access	New Southgate Station (9 spaces) (pay). No on-street car parking. Pedestrian and zebra crossings with refuges to either end of Friern Barbet Road. Dropped kerbs at crossing points.

Environmental quality

Townscape, street furniture & green space	Wide pavements. No street furniture or planting, although litter bins provided. Minimal littering.
Perception of safety & evidence of crime	No evidence of antisocial behaviour or crime.
Development opportunities & recent investment	**Recent investment:** - 8 Oakleigh Road South (residential development) - 43 Friern Barnet Road (residential block including ground floor Co-operative store). **Development opportunities:** - None evident
Commercial yields & rents	5 yr. average asking rent - £20.11 psf (Borough local centre average £22.28) 5 yr. average yield – 6.1% (Borough local centre average 6.7%)
Customer views & behaviour	Insufficient responses from household survey.

<table>
<tr><td>Retailer requirements</td><td colspan="2">No current retailer requirements</td></tr>
<tr><td colspan="3">Recommendations</td></tr>
<tr><td rowspan="2">Summary (SWOT)</td><td>Strengths
▪ Public transport accessibility;
▪ Relatively good building quality;
▪ Proximity to nearby residential properties.</td><td>Weaknesses
▪ Lack of cafés and restaurants to attract leisure shoppers to centre;
▪ Relatively poor provision of comparison retailers.</td></tr>
<tr><td>Opportunities
▪ Enhance retail offer to provide more key local services;
▪ Improvements to public realm (street furniture and planting);
▪ Benefit from increased footfall brought by residential units;
▪ Re-use of vacant public house (The Bank)</td><td>Threats
▪ Proximity to Friern Bridge Retail Park and potential resulting loss of footfall;
▪ Perception of poor retail offer threatening footfall.</td></tr>
<tr><td>Recommendation</td><td colspan="2">Healthy
The centre’s strengths, the independent retail offer and high quality environment, are good building blocks. The comparison offer is limited and would benefit from some improvement. Similarly, there are relatively few national multiples which could increase footfall in the centre; however, this needs to be balanced against any threats to the independent retailers and occupiers that currently underpin the centre. Some aesthetic attention and planting would significantly improve the appeal of the centre and make it more attractive to investors and pedestrians.</td></tr>
</table>

WEST HENDON (LOCAL CENTRE)

Date of survey: 31/05/2017

Uses by category

Category	No. of units	% of units	UK %	Floorspace sq.m	Floorspace (%)	UK %
Convenience	13	15.5	9.41	1370	17.0	18.34
Comparison	17	20.2	39.10	1860	23.0	44.18
Services	37	44.0	38.17	2920	36.2	25.84
Vacant	17	20.2	12.13	1920	23.8	10.71
Other	0	0.0	1.19	0	0.0	0.97
Total	84	100	100	8070	100	100

Diversity of uses & retailer representation

Retail, services, community uses & other uses	Convenience: provision above the national average, includes Costcutter and a mix of newsagents and independent food stores (greengrocers, halal butchers and bakers). Comparison: provision below national average, includes pharmacy, hardware, homeware, cycle and sports goods stores. Food and drink: offer dominated by takeaways and cafes orientated towards the low to middle end of the market. Services: well above the national average, extensive range of services: hairdressers, opticians, computer repair centre, post office, betting office, car repairs and boat centre. Vacancies: 17 vacant units, well above the national average
National multiples	There are very few national multiple operators in West Hendon which is not unusual for a centre of its size. National multiples present include: Costcutter, Pound Shop and the Post Office.

Accessibility

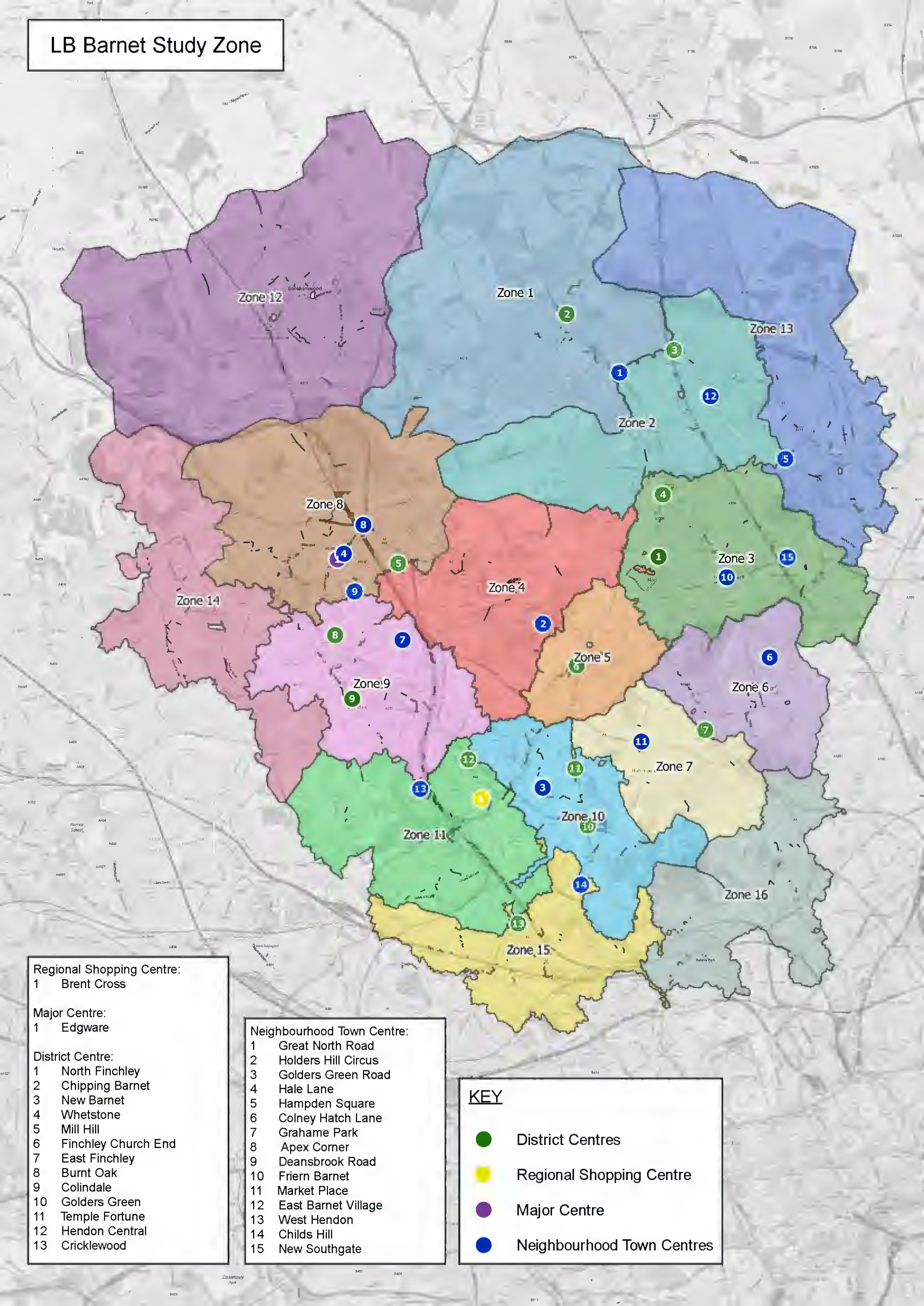
PTAL	West Hendon is accessible by public transport which is reflected in the centre's PTAL rating of 3. The centre is served by direct local buses to Pinner, Watford, Edgware, Alperton, Golders Green, Brent Cross and Kilburn Park. The nearest rail station, Hendon, is located within a 5-minute walk of the centre which provides direct access into central London.
Car parking, pedestrian linkages & disabled access	Perryfield Way (69 spaces, Pay), Hendon Station (44 spaces, Pay).

Environmental quality

Townscape, street furniture & green space	Overall the quality of the townscape and public realm is poor. The quality of the paving is poor and there is no street furniture or planting. On the site visit we observed commercial rubbish left on the streets by businesses. Some units appear neglected and would benefit from restoration to improve the shop fronts. The nearest green space is York Park located immediately west of the centre.
Perception of safety & evidence of crime	The centre felt generally safe and secure and we did not observe any anti-social behaviour or crime during the site visit.
Development opportunities & recent investment	Recent investment: - New residential development on Mapesbury Mews No further development opportunities identified except for refurbishing some existing units.

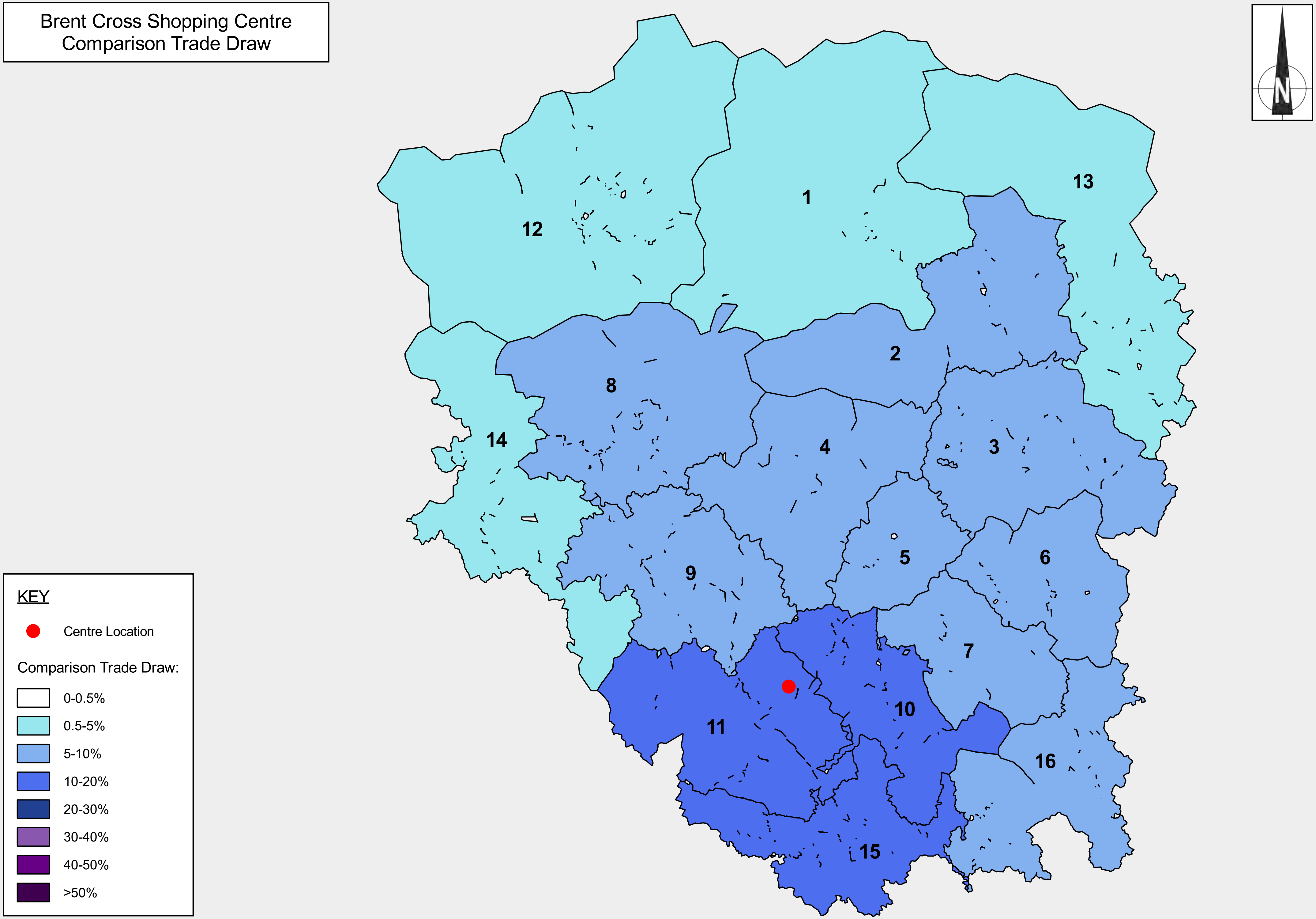
<table>
<tr><th colspan="2">WEST HENDON (LOCAL CENTRE)</th><th>Date of survey: 31/05/2017</th></tr>
<tr><td>Commercial yields & rents</td><td colspan="2">According to Co-Star, the five-year average rent for West Hendon is £23.55 per sq.ft which is slightly higher than the borough local centre average of £22.28 per sq.ft. This rent level indicates moderate operator demand in the area however, average rent figures should be treated with a degree of caution since they can mask greater variations recorded in individual transactions. Co-Star does not provide five-year average yield data for West Hendon.</td></tr>
<tr><td>Customer views & behaviour</td><td colspan="2">Insufficient responses from household survey.</td></tr>
<tr><td>Retailer requirements</td><td colspan="2">According to Shopproperty there are currently no published retailer requirements for West Hendon however this should not be taken to mean that there is no demand for floorspace. This may be attributable to the fact that requirements generally only published by national multiple operator’s. The absence of retail requirements for West Hendon reflects the nature of retail provision in the centre which contains a strong independent retail offer.</td></tr>
<tr><td colspan="3">Recommendations</td></tr>
<tr><td rowspan="2">Summary (SWOT)</td><td>Strengths
Proximity to Hendon railway station;
Good provision of key local services.</td><td>Weaknesses
High vacancy rate;
Lack of national multiples and quality comparison retail offer;
Relatively poor townscape and neglected units.</td></tr>
<tr><td>Opportunities
Provide improvements to public realm (street planting, furniture etc.) to attract new footfall;
Attract new occupants to vacant units to provide new services and improve townscape.</td><td>Threats
Failure to attract new footfall due to poor public realm and quality of retail offer;
Loss of footfall to other centres and warehouse retailers (Pets at Home, Halfords, Sainsbury’s).</td></tr>
<tr><td>Recommendation</td><td colspan="2">Underperforming: The centre is considered to be underperforming against a range of key indicators. While there is a reasonably diverse retail offer it is firmly focused at the value end of the market. There are deficiencies in the convenience offer arising from the lack of anchor food store. The food and drink offer is similarly of low quality and could be improved by the provision of new restaurants. The high vacancy levels combined suggest that the floorspace is not fit for purpose.</td></tr>
</table>

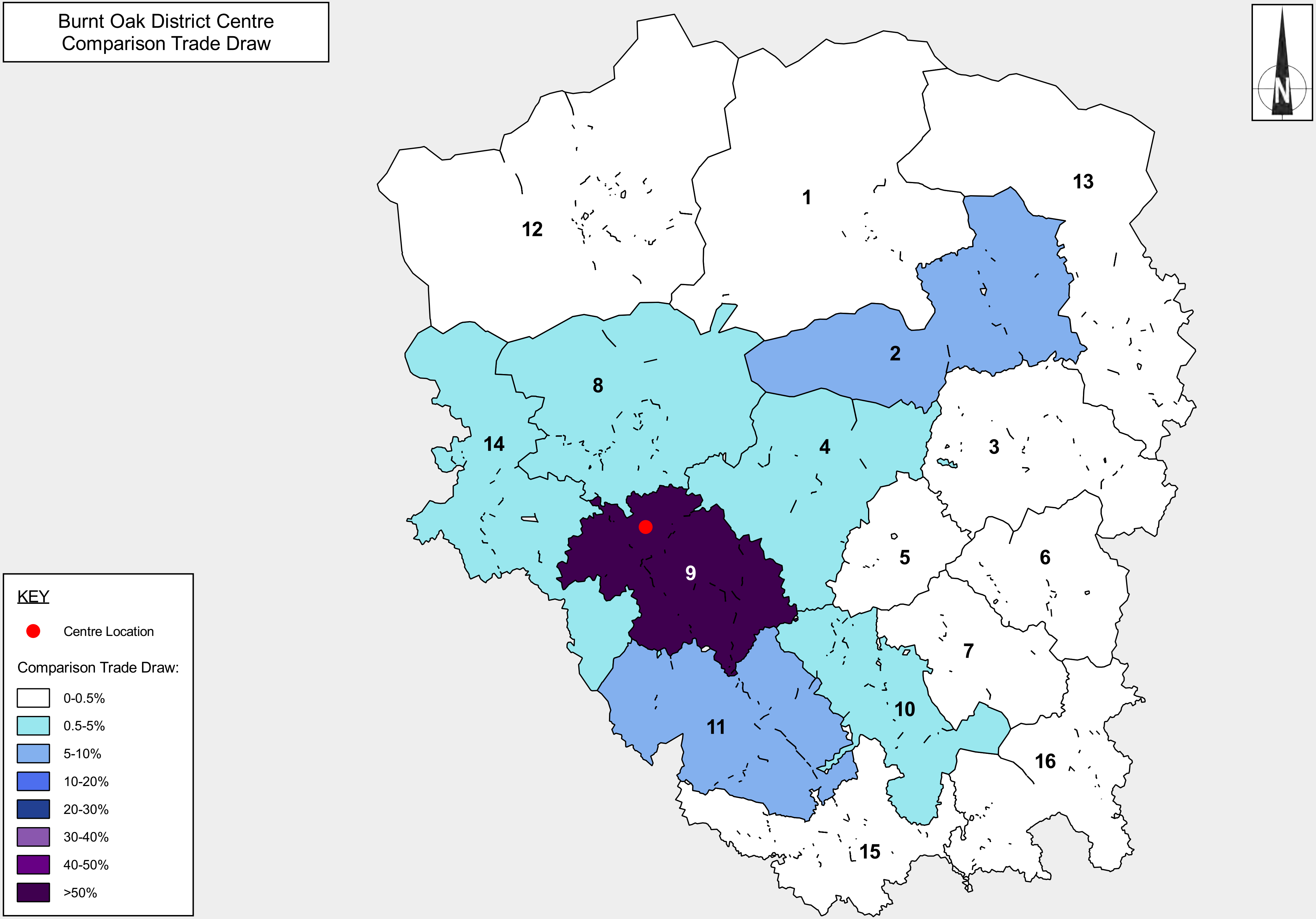
APPENDIX C   STUDY AREA PLAN

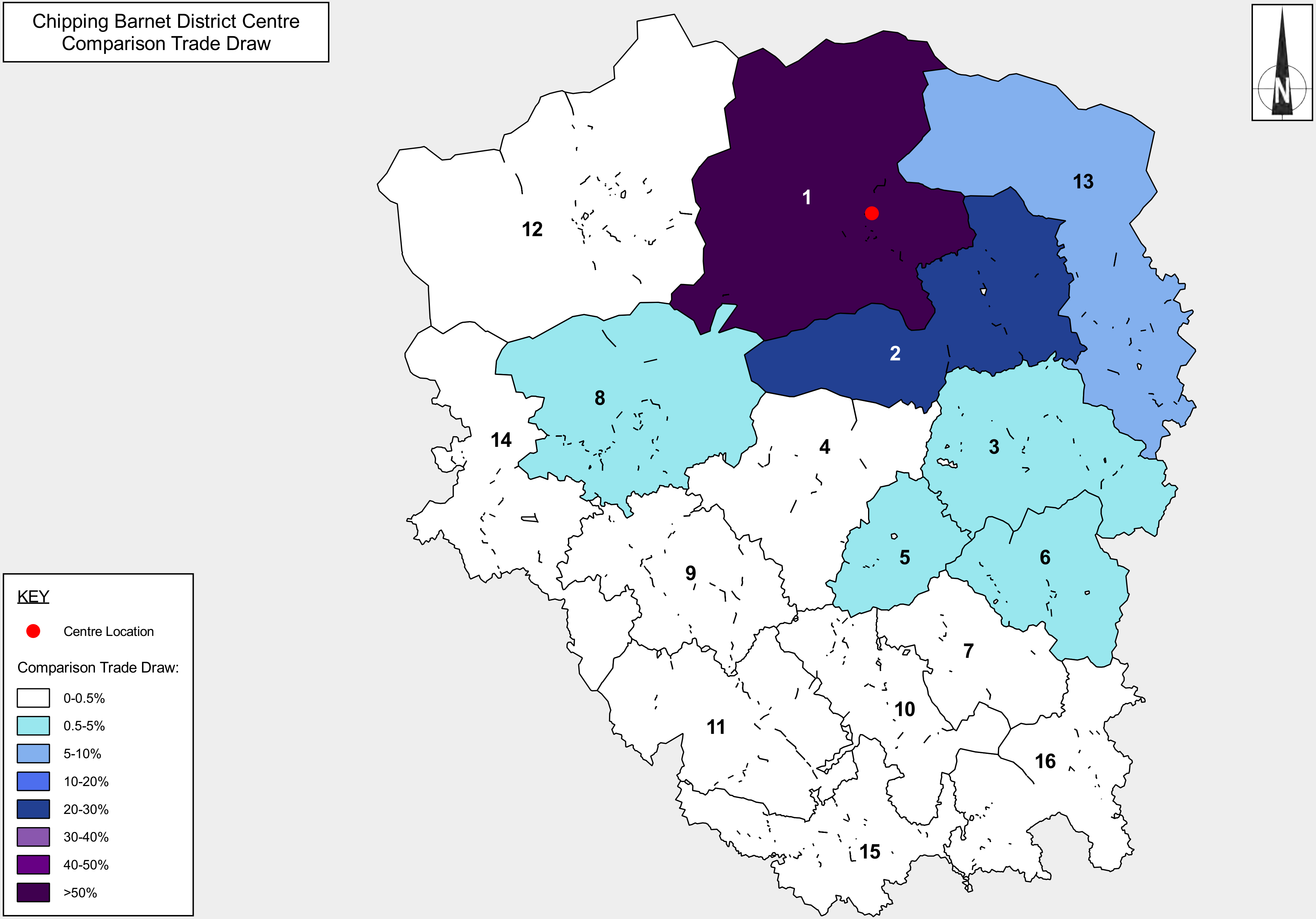

LB Barnet Study Zone
Zone 1
Zone 2
Zone 3
Zone 4
Zone 5
Zone 6
Zone 7
Zone 8
Zone 9
Zone 10
Zone 11
Zone 12
Zone 13
Zone 14
Zone 15
Zone 16
Regional Shopping Centre:
1 Brent Cross
Major Centre:
1 Edgware
District Centre:
1 North Finchley
2 Chipping Barnet
3 New Barnet
4 Whetstone
5 Mill Hill
6 Finchley Church End
7 East Finchley
8 Burnt Oak
9 Colindale
10 Golders Green
11 Temple Fortune
12 Hendon Central
13 Cricklewood
Neighbourhood Town Centre:
1 Great North Road
2 Holders Hill Circus
3 Golders Green Road
4 Hale Lane
5 Hampden Square
6 Colney Hatch Lane
7 Grahame Park
8 Apex Corner
9 Deansbrook Road
10 Friern Barnet
11 Market Place
12 East Barnet Village
13 West Hendon
14 Childs Hill
15 New Southgate
KEY
District Centres
Regional Shopping Centre
Major Centre
Neighbourhood Town Centres

APPENDIX D COMPARISON TRADE DRAW MAPS

Brent Cross Shopping Centre
Comparison Trade Draw

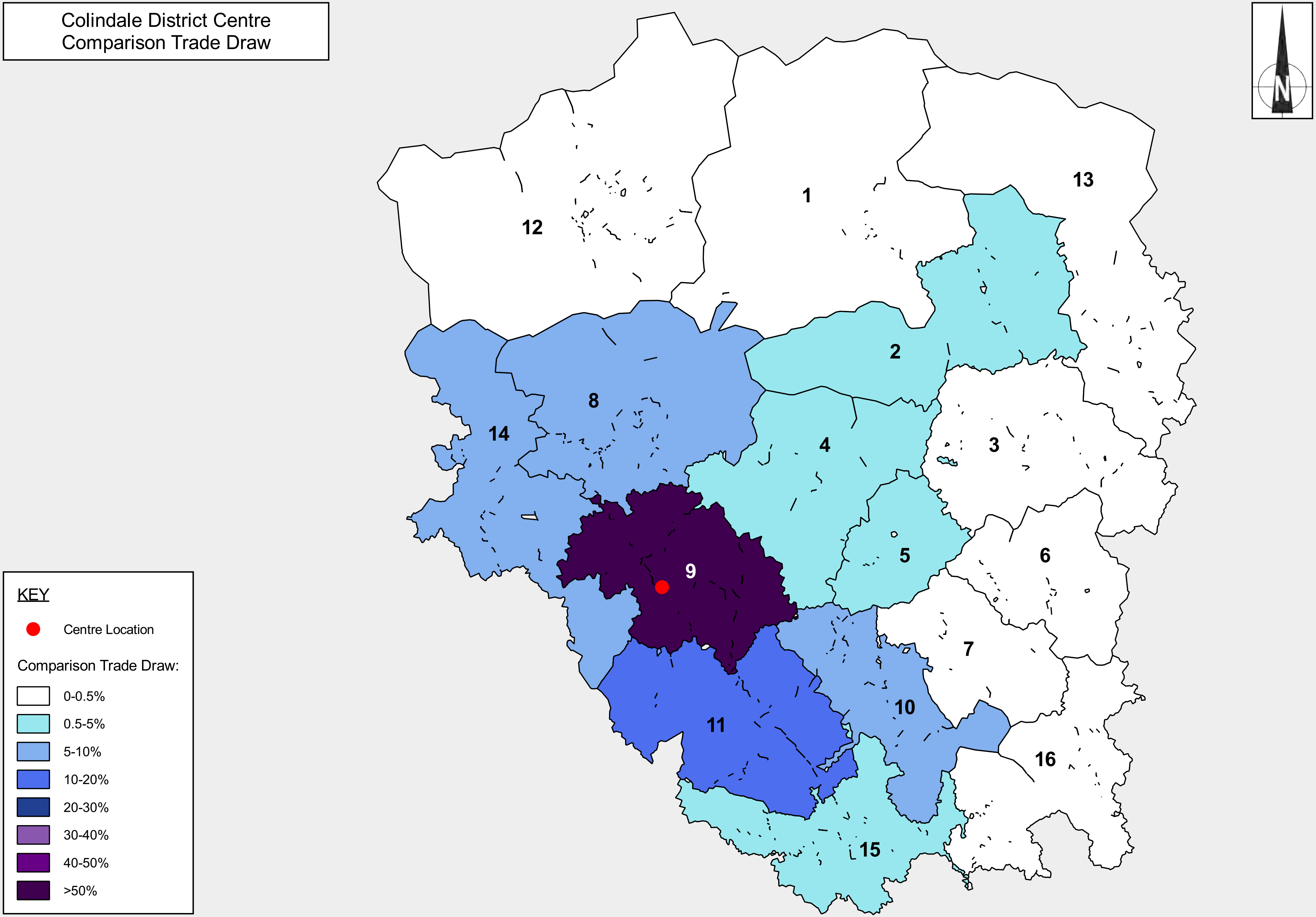



Burnt Oak District Centre
Comparison Trade Draw
12
1
13
2
8
14
4
3
9
5
6
7
10
11
16
15
N
KEY
Centre Location
Comparison Trade Draw:
0-0.5%
0.5-5%
5-10%
10-20%
20-30%
30-40%
40-50%
>50%

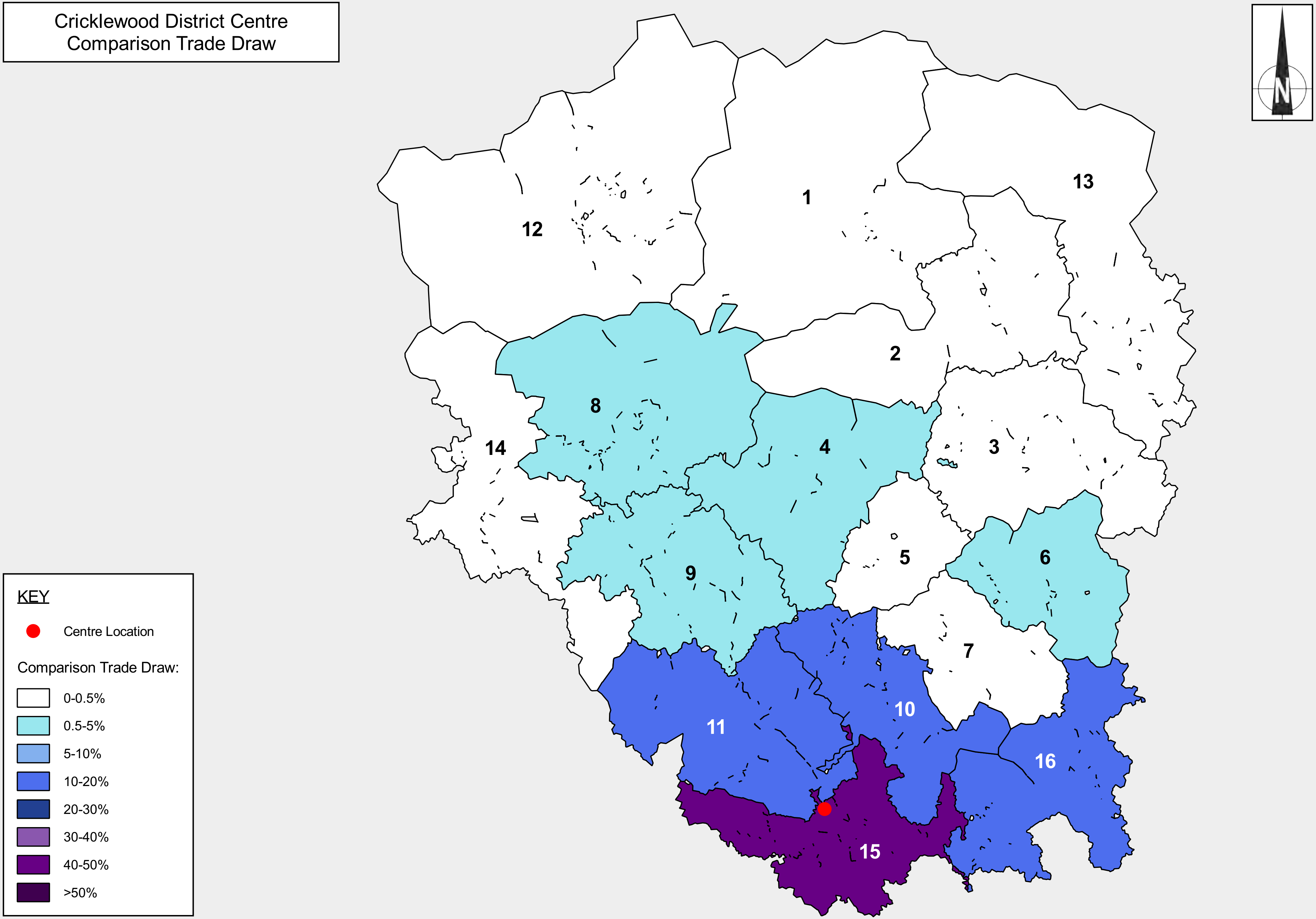


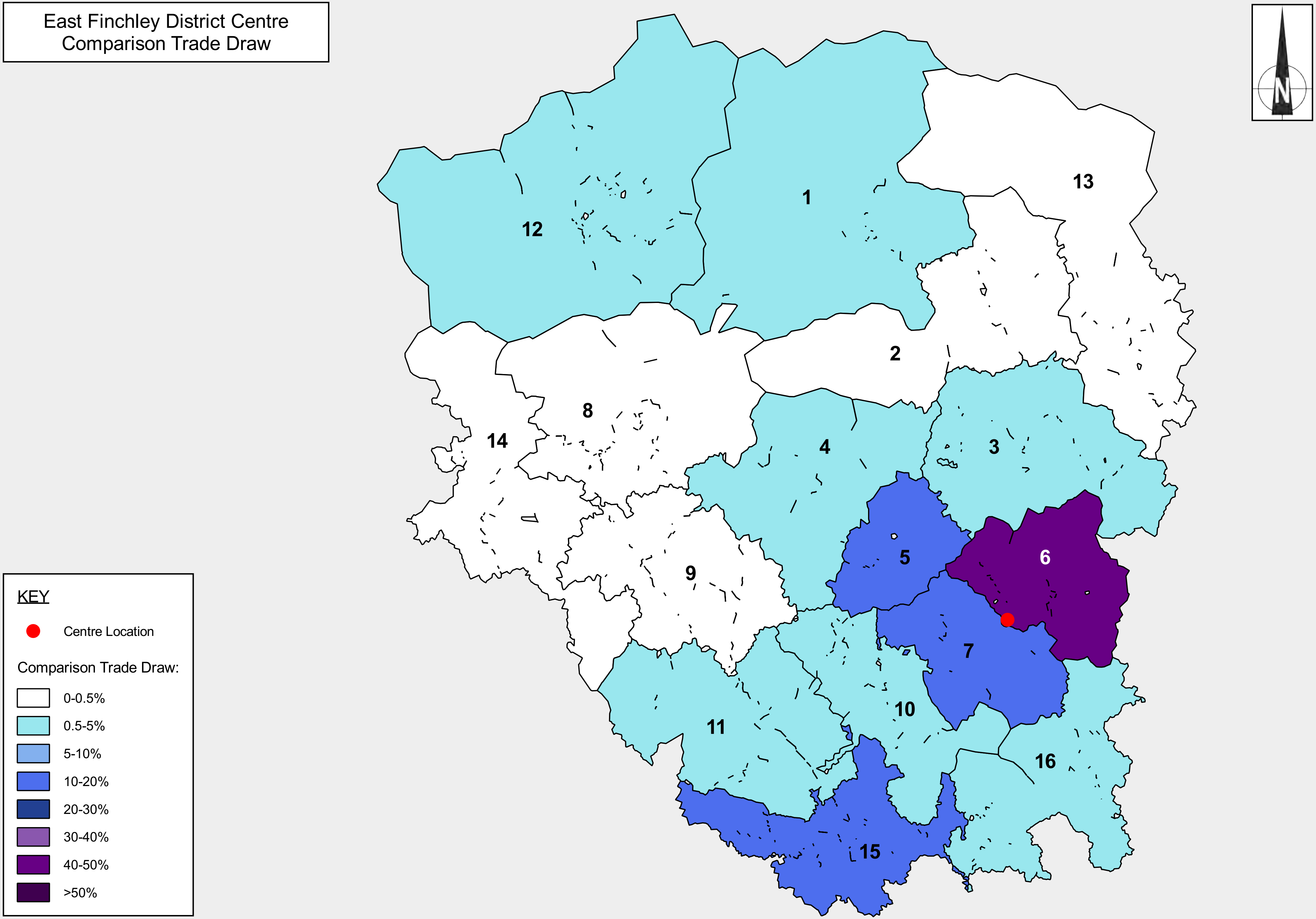
Chipping Barnet District Centre
Comparison Trade Draw
N
1
2
3
4
5
6
7
8
9
10
11
12
13
14
15
16
KEY
Centre Location
Comparison Trade Draw:
0-0.5%
0.5-5%
5-10%
10-20%
20-30%
30-40%
40-50%
>50%

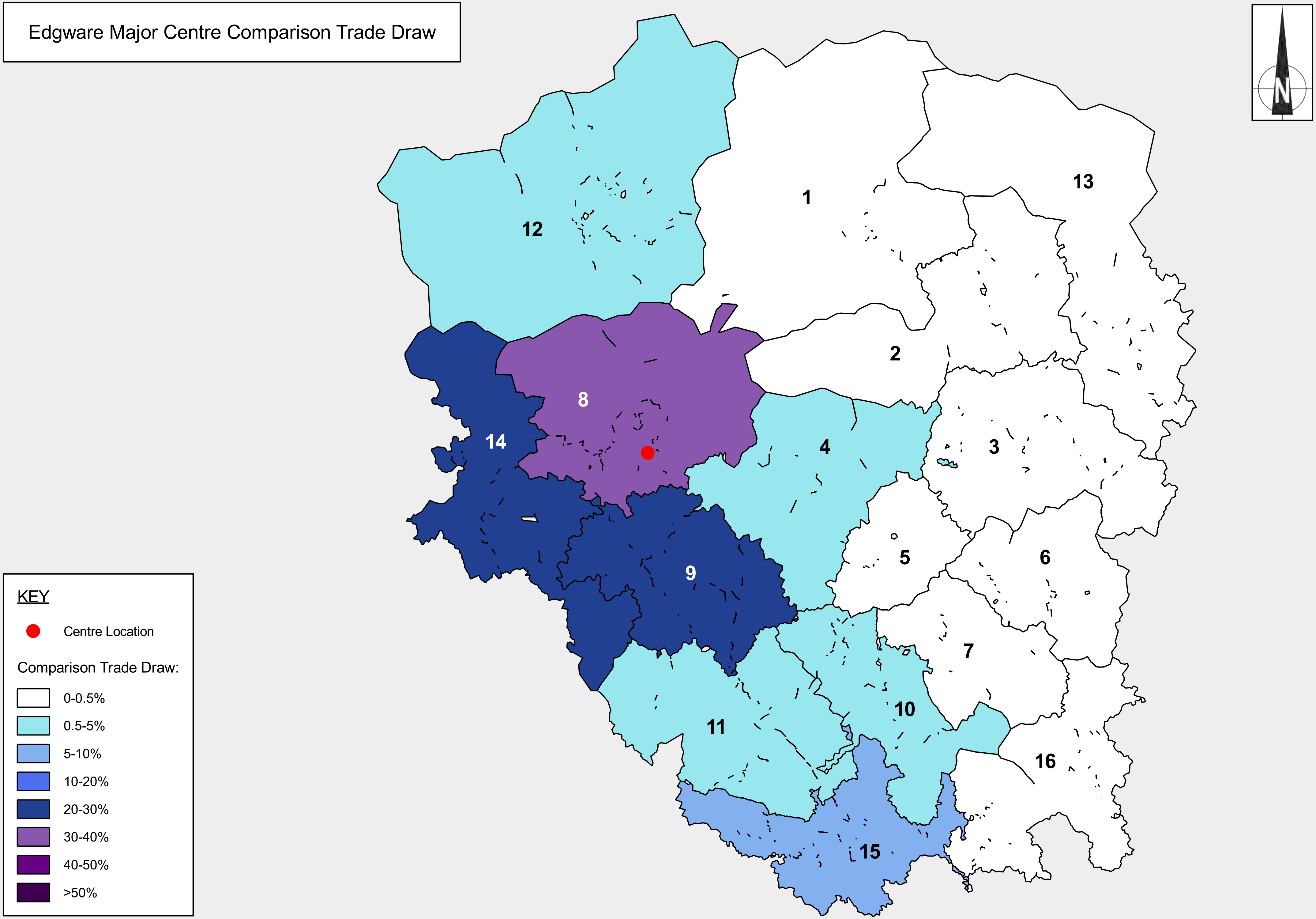
Colindale District Centre
Comparison Trade Draw



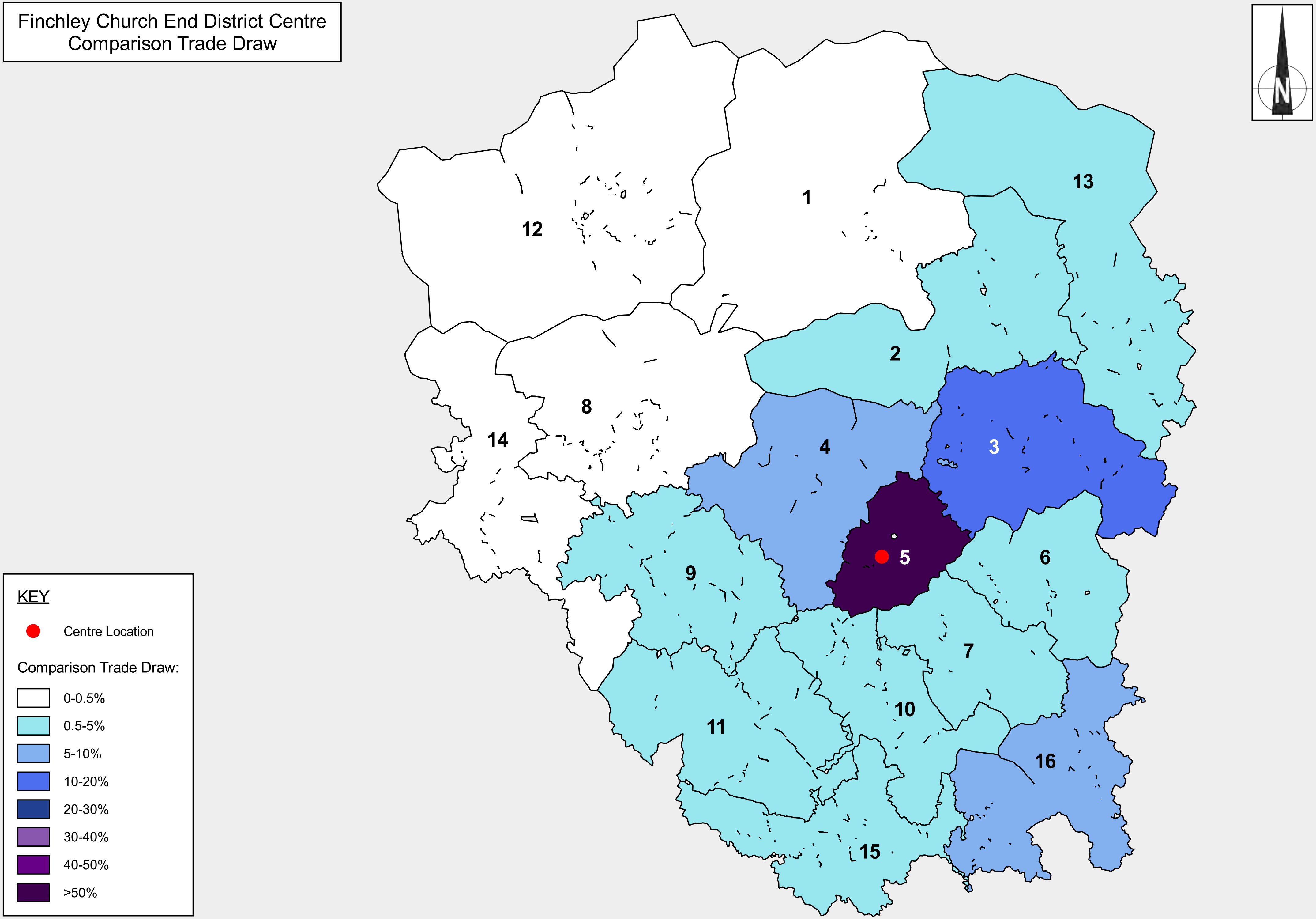
Cricklewood District Centre
Comparison Trade Draw

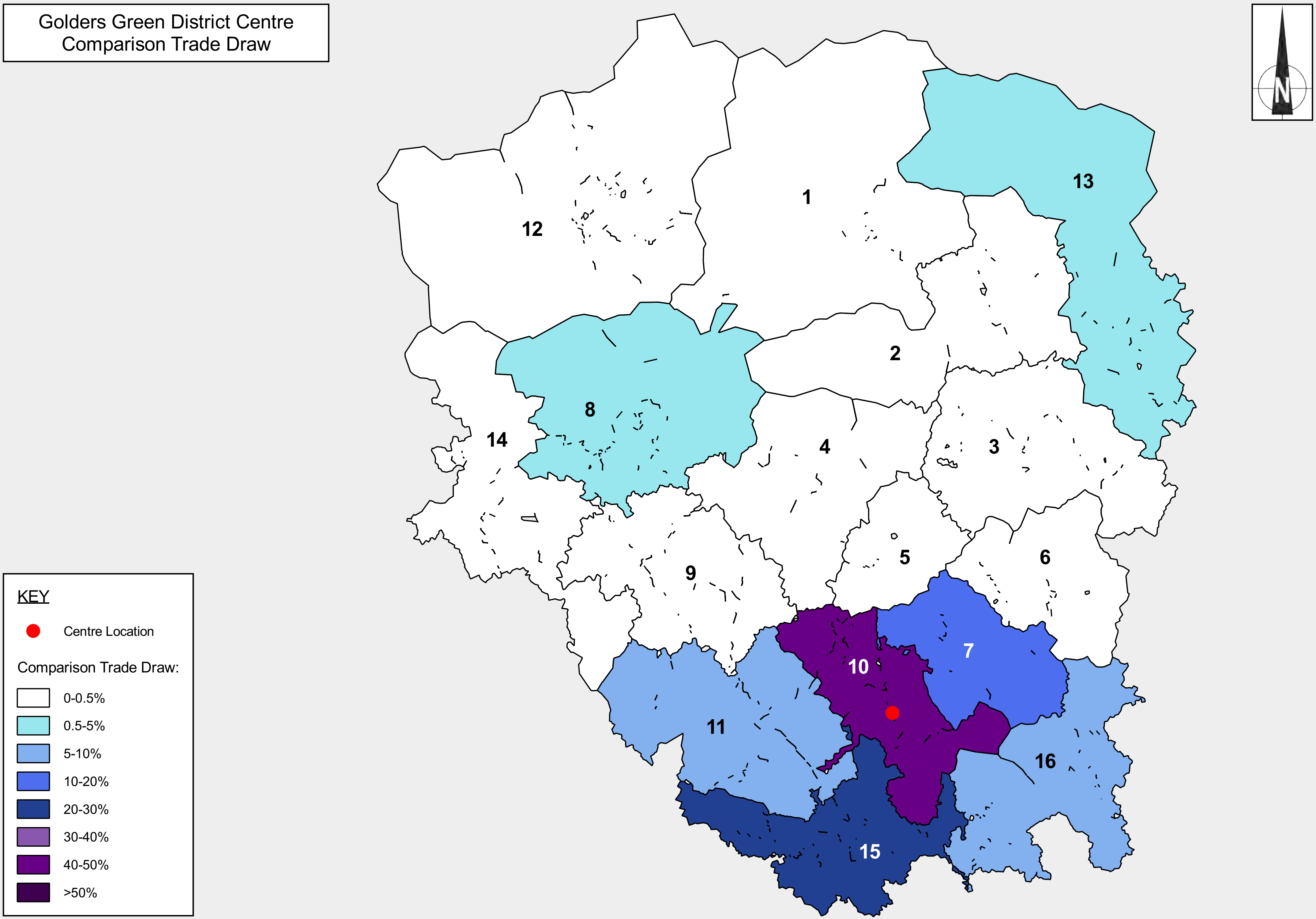



East Finchley District Centre
Comparison Trade Draw
KEY
Centre Location
Comparison Trade Draw:
0-0.5%
0.5-5%
5-10%
10-20%
20-30%
30-40%
40-50%
>50%
N
1
2
3
4
5
6
7
8
9
10
11
12
13
14
15
16

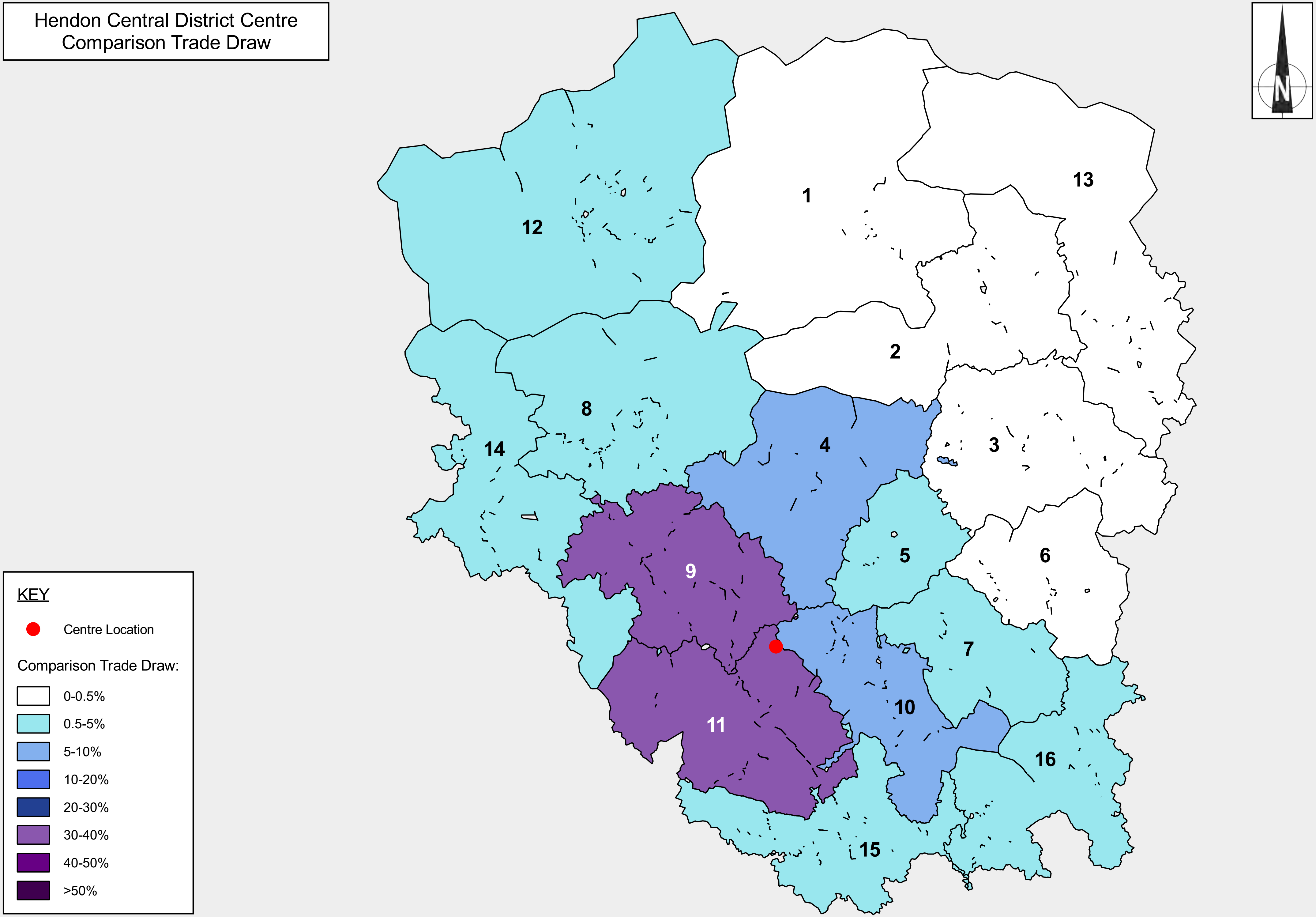

Edgware Major Centre Comparison Trade Draw
N
1
2
3
4
5
6
7
8
9
10
11
12
13
14
15
16
KEY
Centre Location
Comparison Trade Draw:
0-0.5%
0.5-5%
5-10%
10-20%
20-30%
30-40%
40-50%
>50%

Finchley Church End District Centre
Comparison Trade Draw

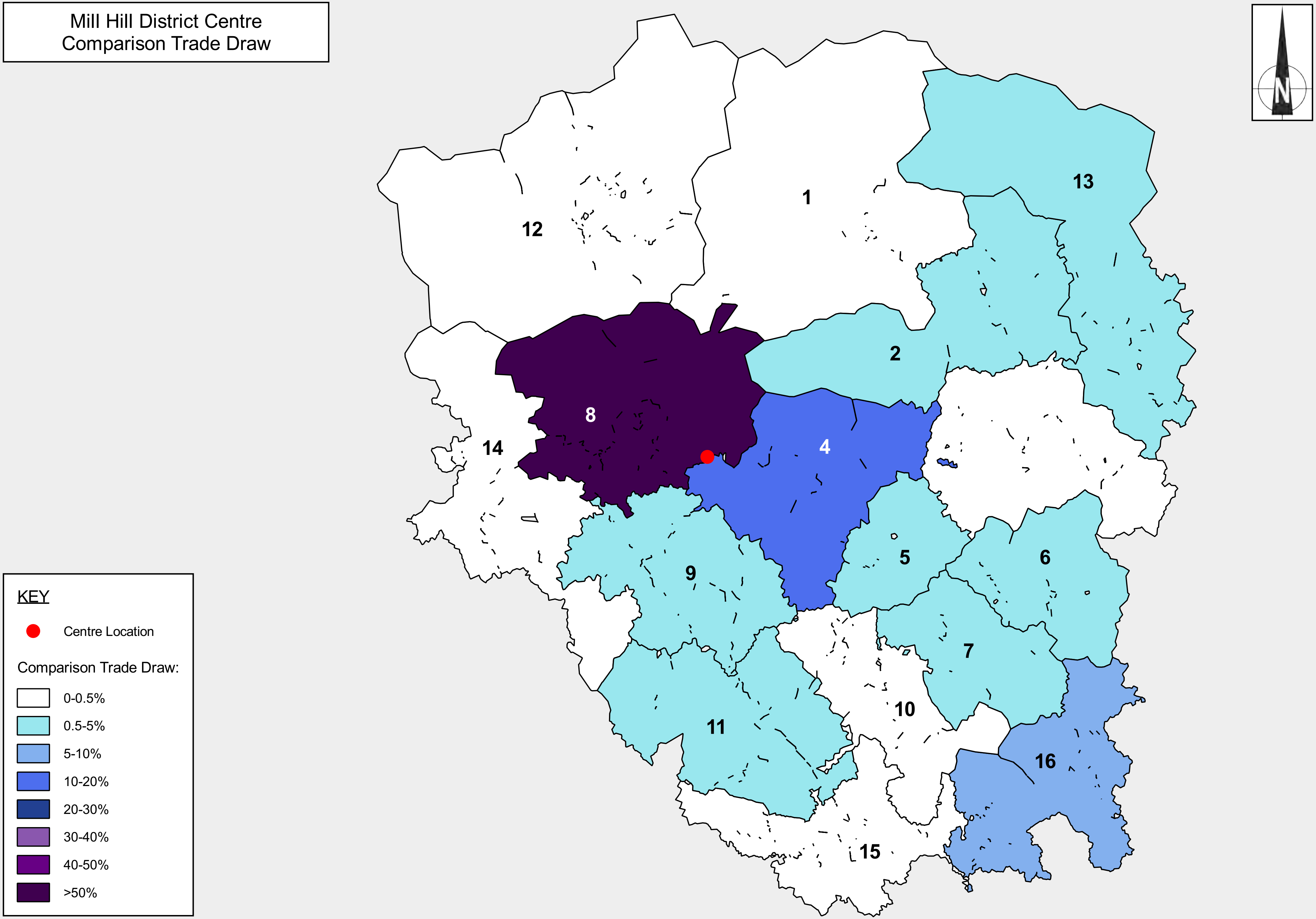


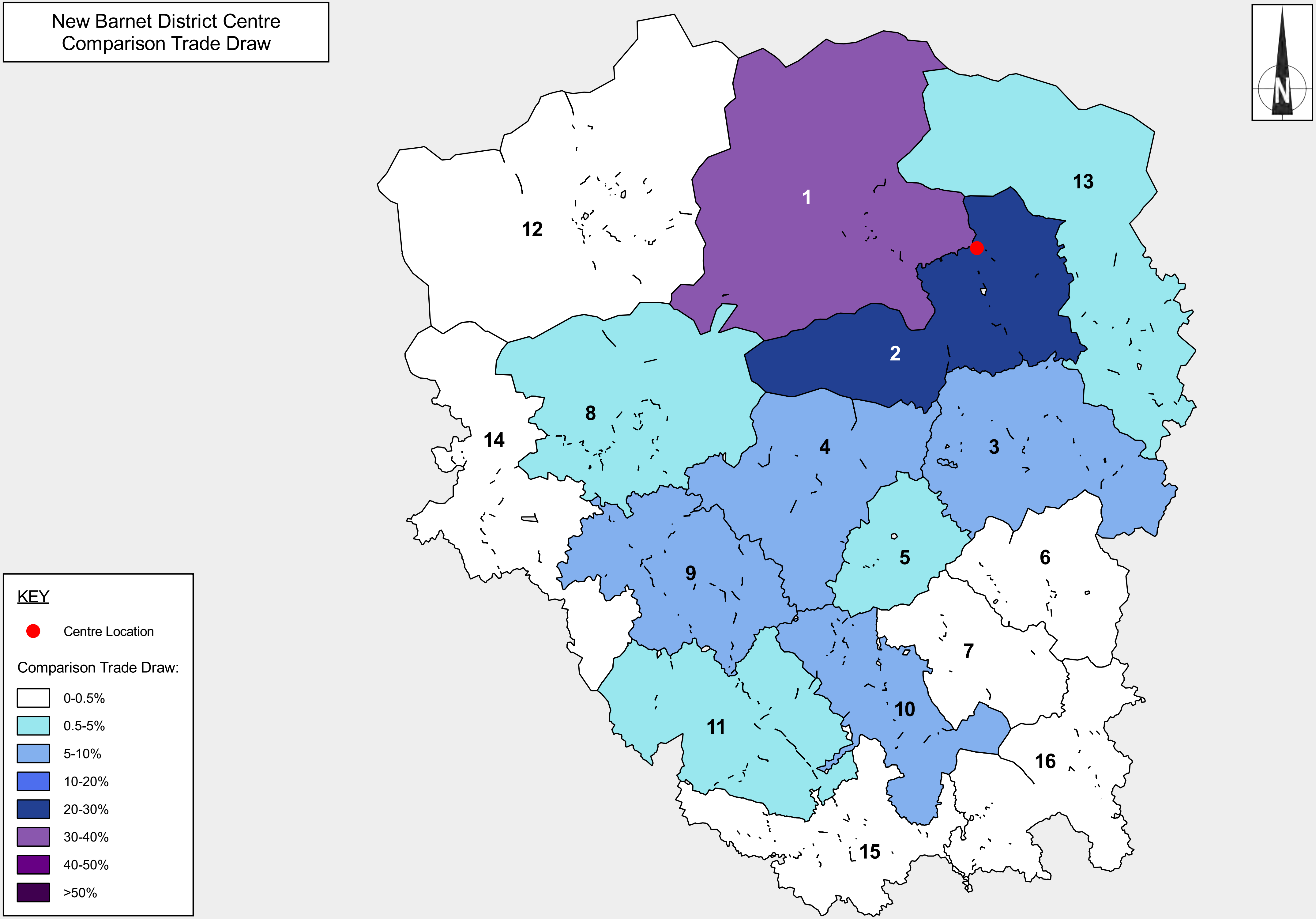


Golders Green District Centre
Comparison Trade Draw
1
2
3
4
5
6
7
8
9
10
11
12
13
14
15
16
N
KEY
Centre Location
Comparison Trade Draw:
0-0.5%
0.5-5%
5-10%
10-20%
20-30%
30-40%
40-50%
>50%

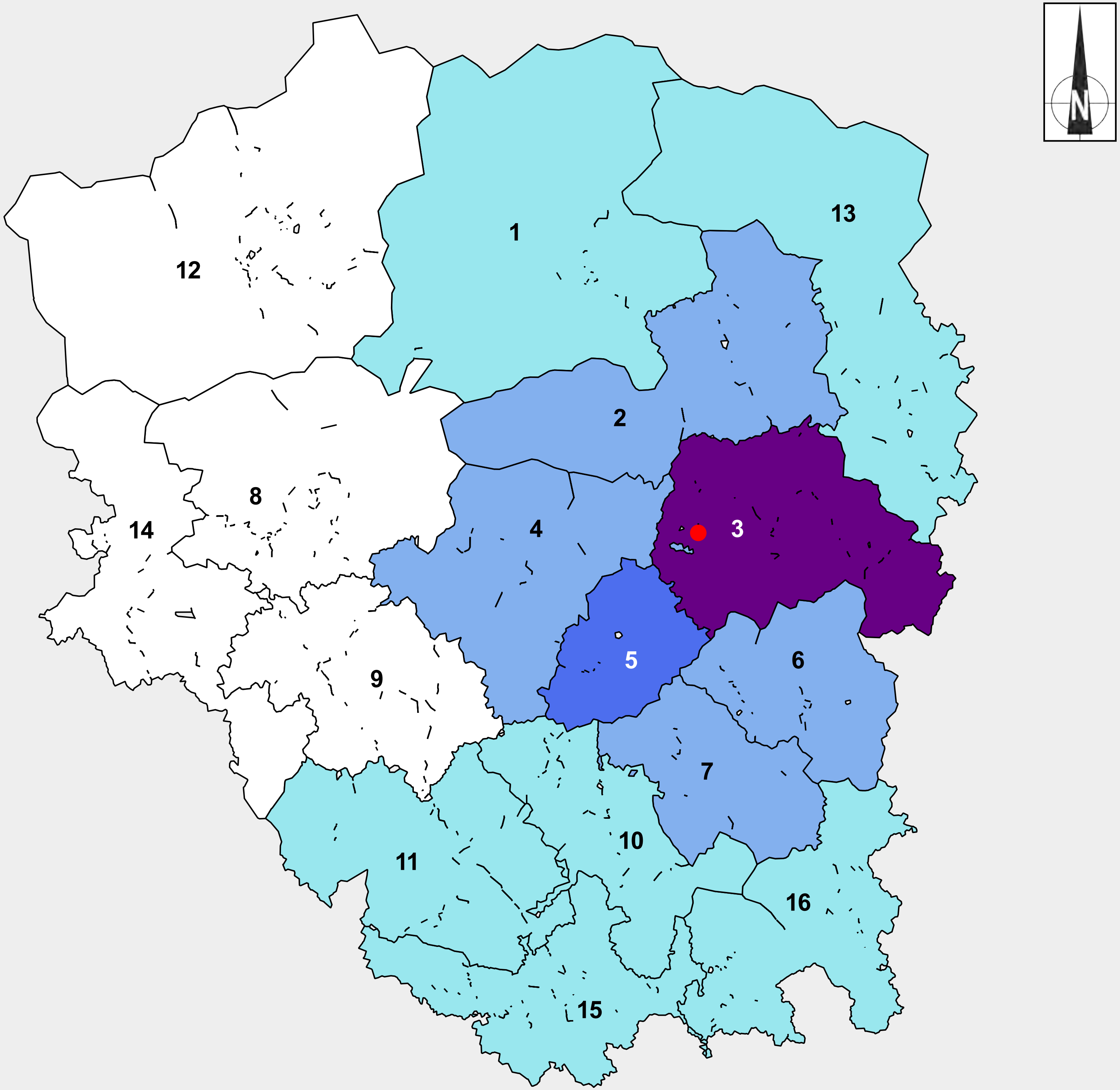


Hendon Central District Centre
Comparison Trade Draw
1
2
3
4
5
6
7
8
9
10
11
12
13
14
15
16
N
KEY
Centre Location
Comparison Trade Draw:
0-0.5%
0.5-5%
5-10%
10-20%
20-30%
30-40%
40-50%
>50%


Mill Hill District Centre
Comparison Trade Draw
N
1
2
4
5
6
7
8
9
10
11
12
13
14
15
16
KEY
Centre Location
Comparison Trade Draw:
0-0.5%
0.5-5%
5-10%
10-20%
20-30%
30-40%
40-50%
>50%


New Barnet District Centre
Comparison Trade Draw
N
1
2
3
4
5
6
7
8
9
10
11
12
13
14
15
16
KEY
Centre Location
Comparison Trade Draw:
0-0.5%
0.5-5%
5-10%
10-20%
20-30%
30-40%
40-50%
>50%

North Finchley District Centre
Comparison Trade Draw



KEY

Centre Location

Comparison Trade Draw:

0-0.5%

0.5-5%

5-10%

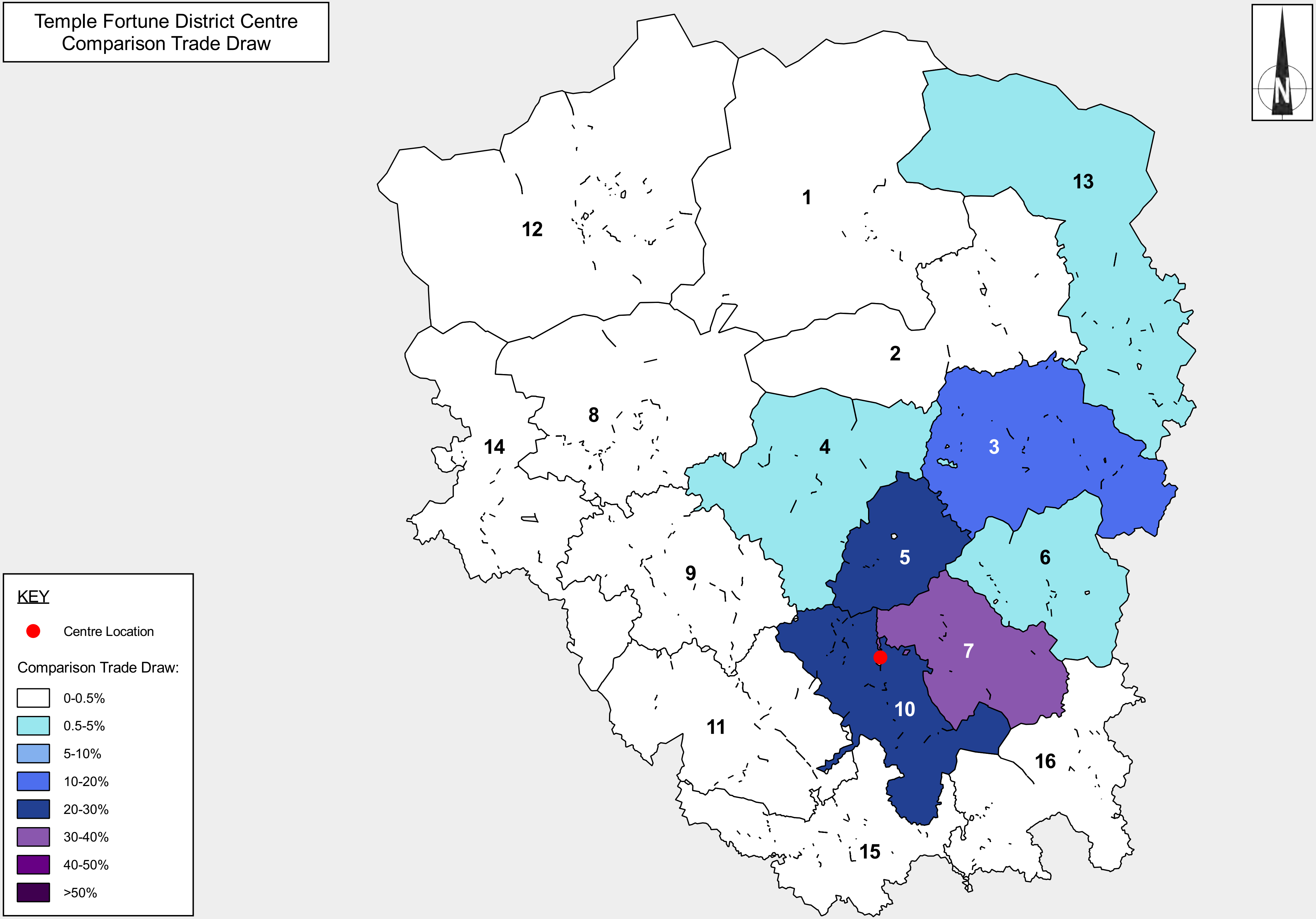
10-20%

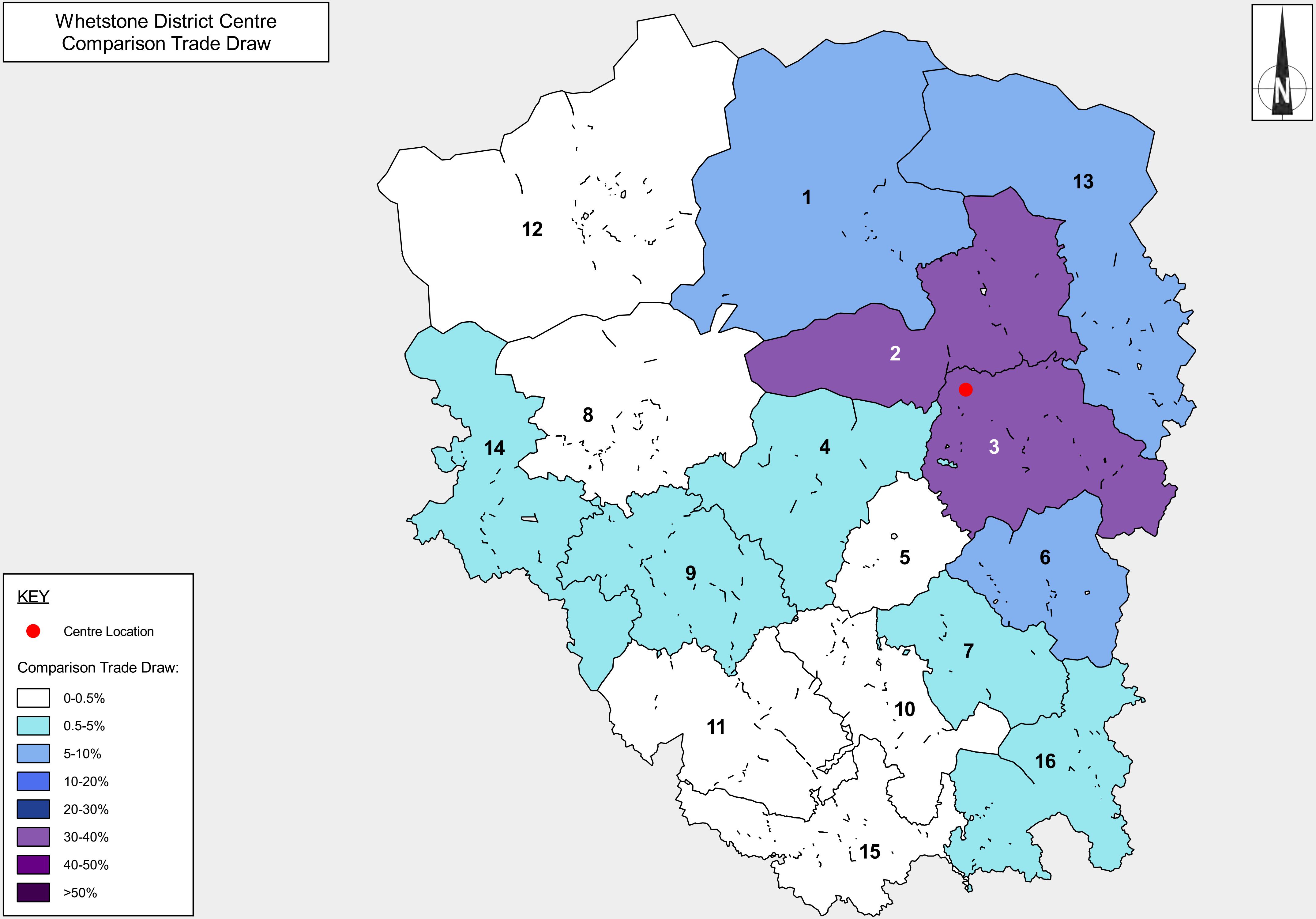
20-30%

30-40%

40-50%

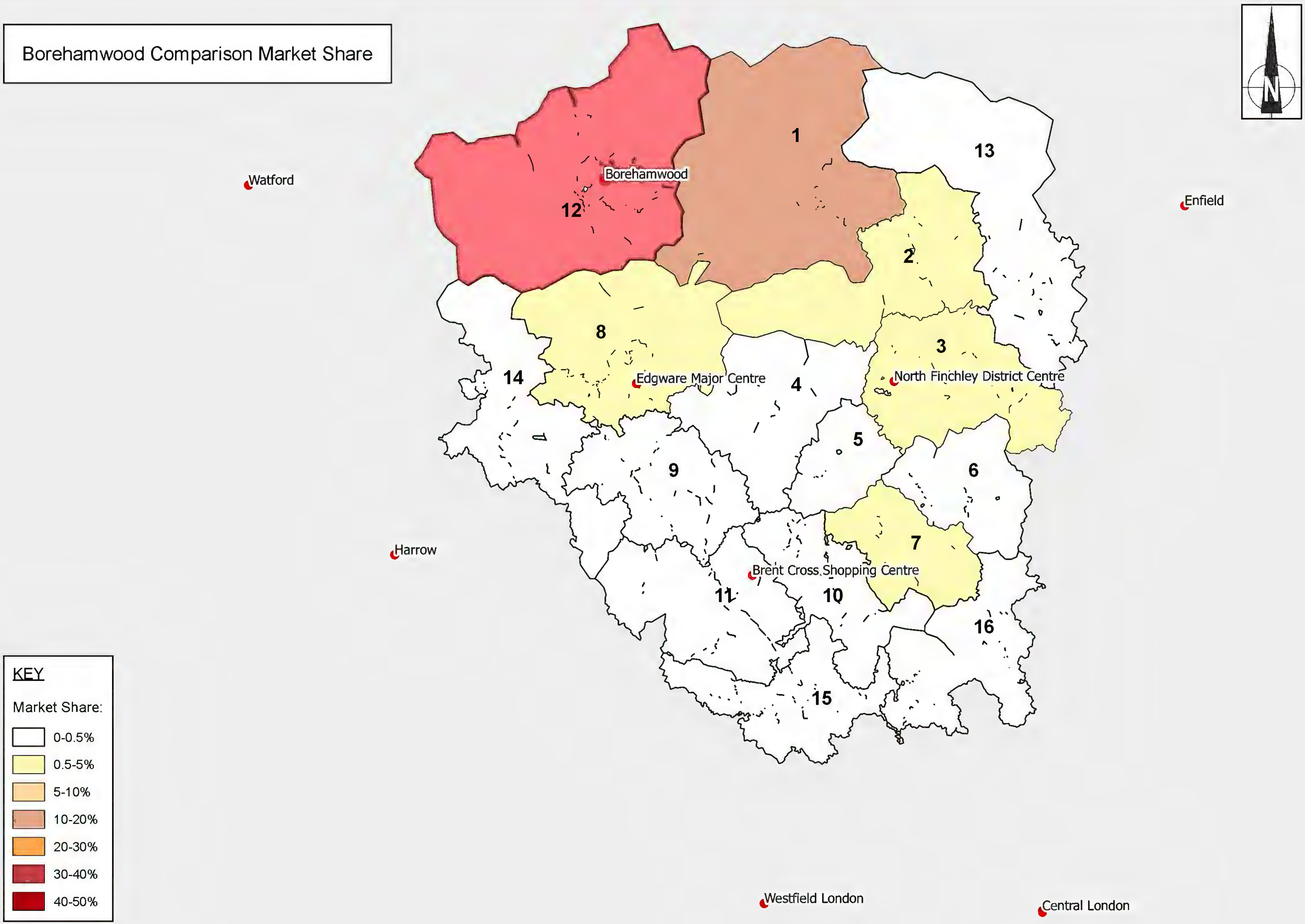
>50%


Temple Fortune District Centre
Comparison Trade Draw
1
2
3
4
5
6
7
8
9
10
11
12
13
14
15
16
KEY
Centre Location
Comparison Trade Draw:
0-0.5%
0.5-5%
5-10%
10-20%
20-30%
30-40%
40-50%
>50%
N

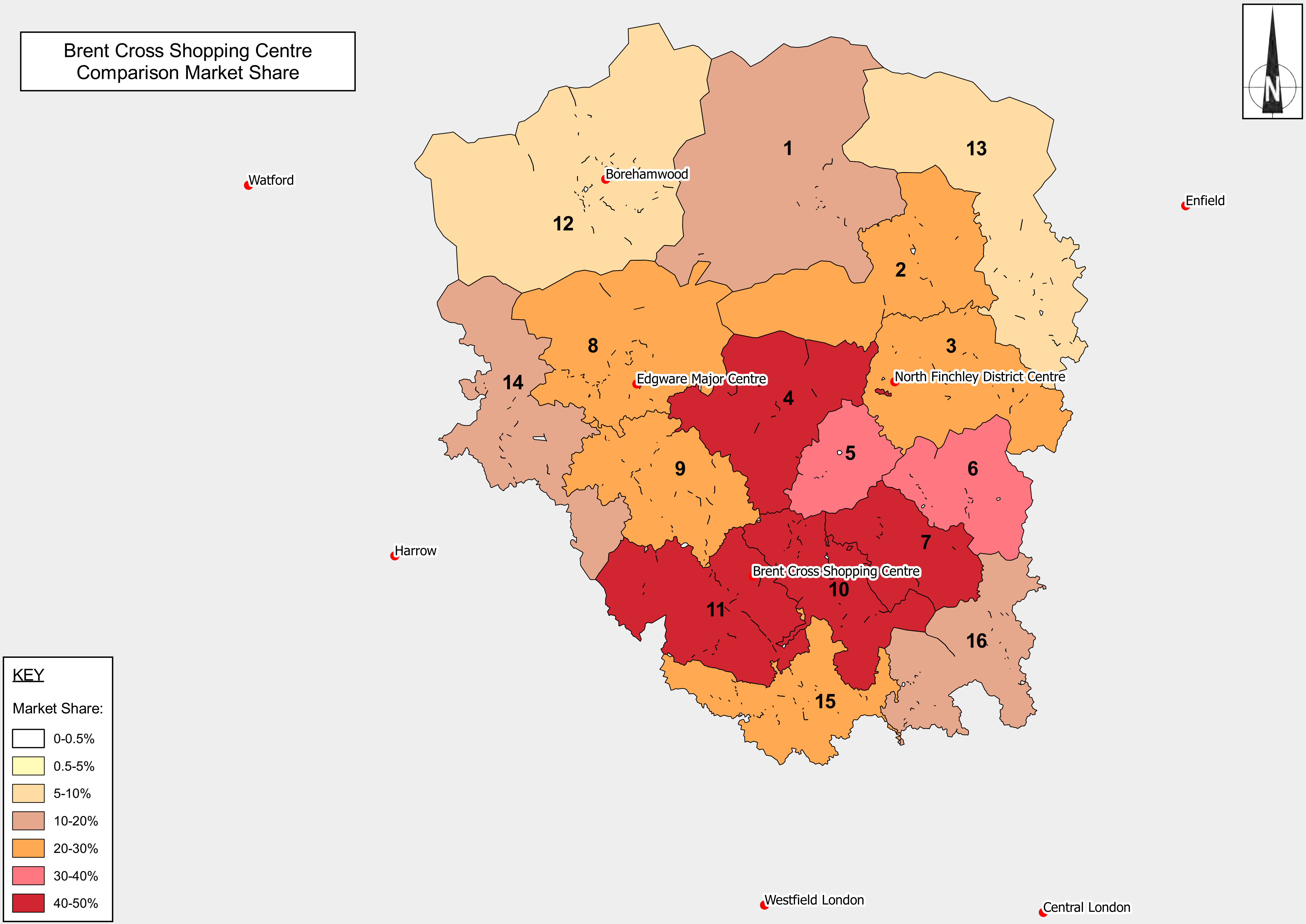


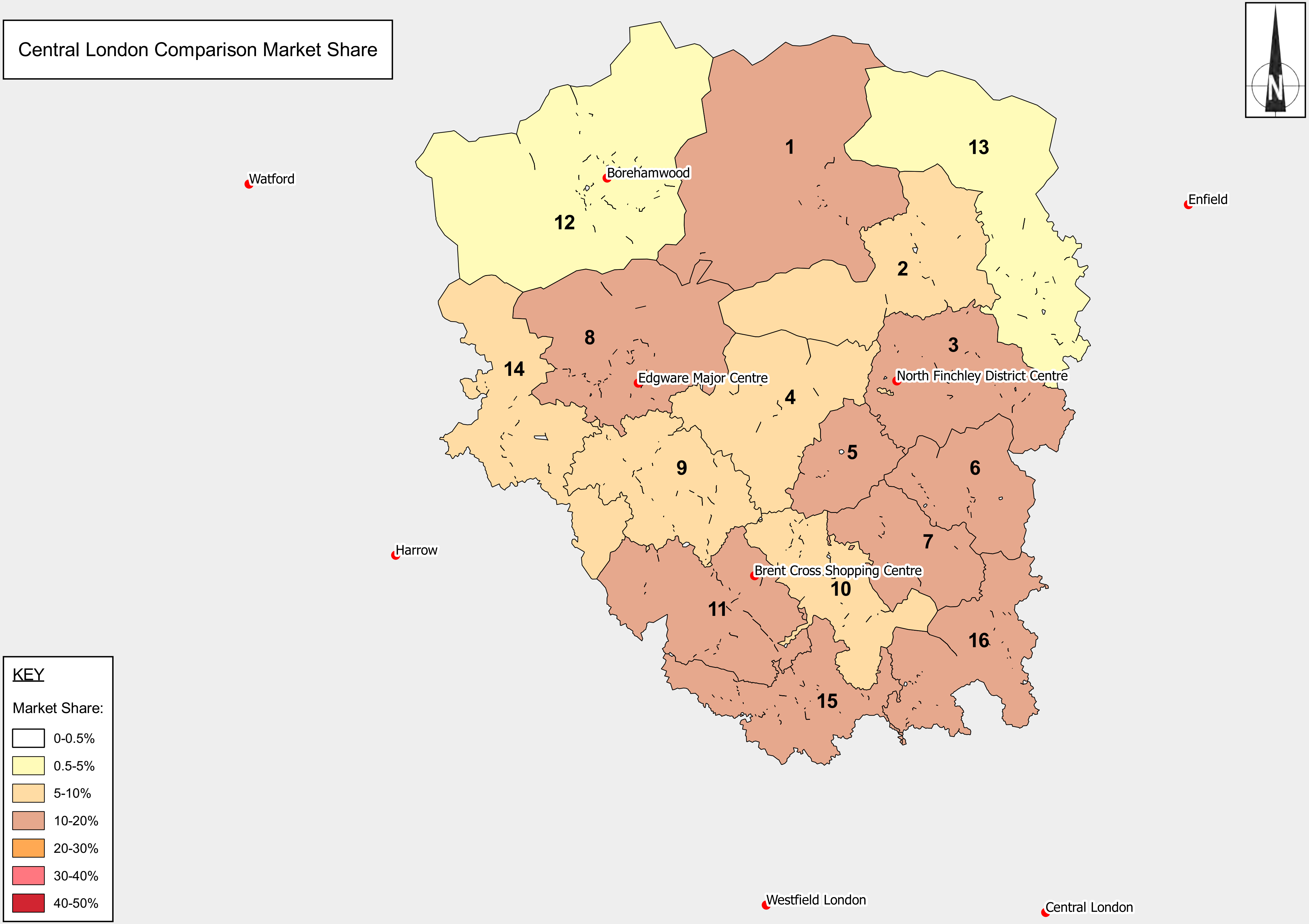
Whetstone District Centre
Comparison Trade Draw
N
1
2
3
4
5
6
7
8
9
10
11
12
13
14
15
16
KEY
Centre Location
Comparison Trade Draw:
0-0.5%
0.5-5%
5-10%
10-20%
20-30%
30-40%
40-50%
>50%

APPENDIX E COMPARISON MARKET SHARE MAPS



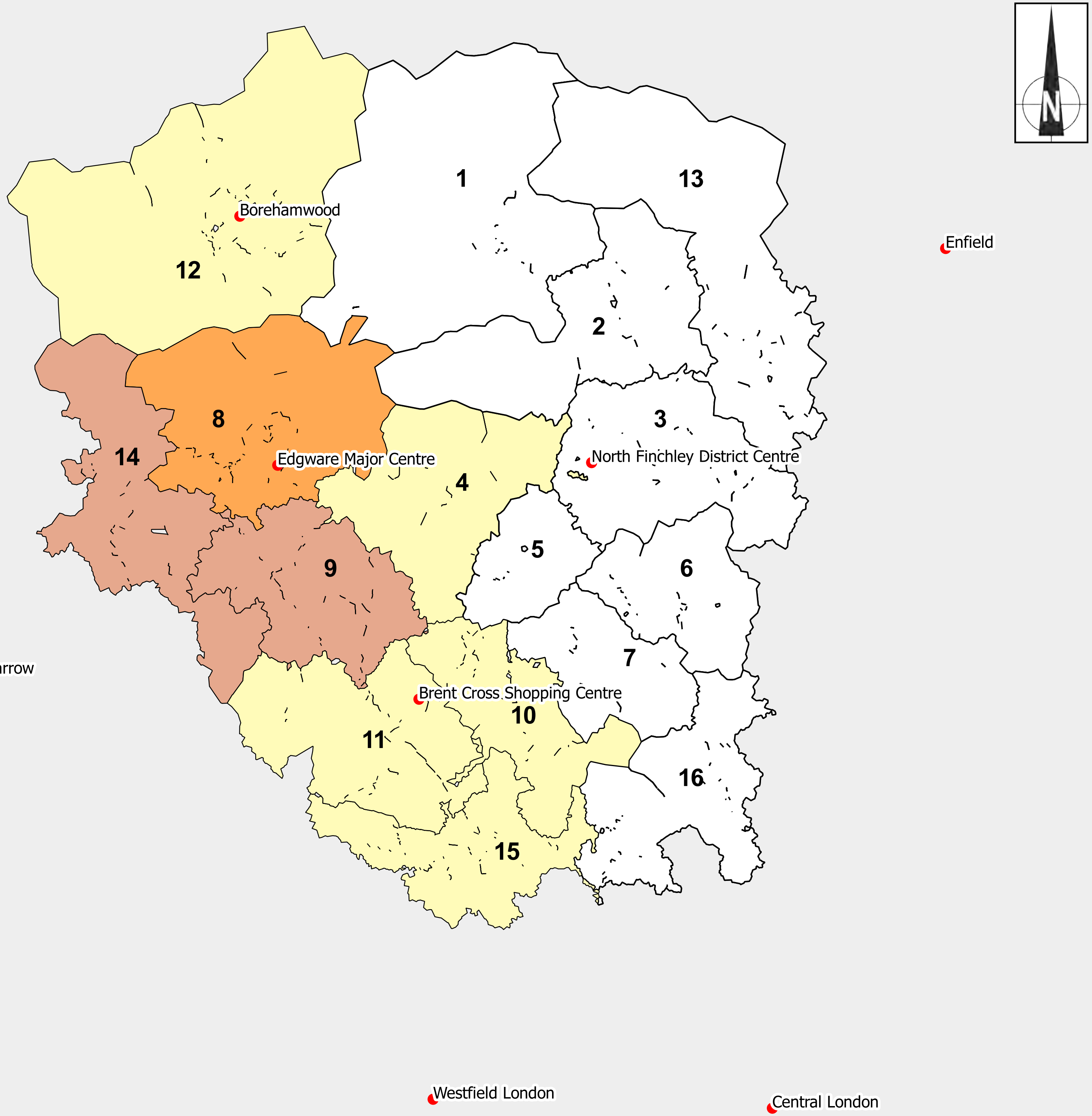
Borehamwood Comparison Market Share
Borehamwood
Watford
Enfield
Edgware Major Centre
North Finchley District Centre
Harrow
Brent Cross Shopping Centre
Westfield London
Central London
1
2
3
4
5
6
7
8
9
10
11
12
13
14
15
16
N
KEY
Market Share:
0-0.5%
0.5-5%
5-10%
10-20%
20-30%
30-40%
40-50%


Brent Cross Shopping Centre
Comparison Market Share
Watford
Borehamwood
Enfield
Edgware Major Centre
North Finchley District Centre
Harrow
Brent Cross Shopping Centre
Westfield London
Central London
1
2
3
4
5
6
7
8
9
10
11
12
13
14
15
16
N
KEY
Market Share:
0-0.5%
0.5-5%
5-10%
10-20%
20-30%
30-40%
40-50%



Central London Comparison Market Share
N
1
2
3
4
5
6
7
8
9
10
11
12
13
14
15
16
Watford
Borehamwood
Enfield
Edgware Major Centre
North Finchley District Centre
Harrow
Brent Cross Shopping Centre
Westfield London
Central London
KEY
Market Share:
0-0.5%
0.5-5%
5-10%
10-20%
20-30%
30-40%
40-50%

Edgware Major Centre
Comparison Market Share

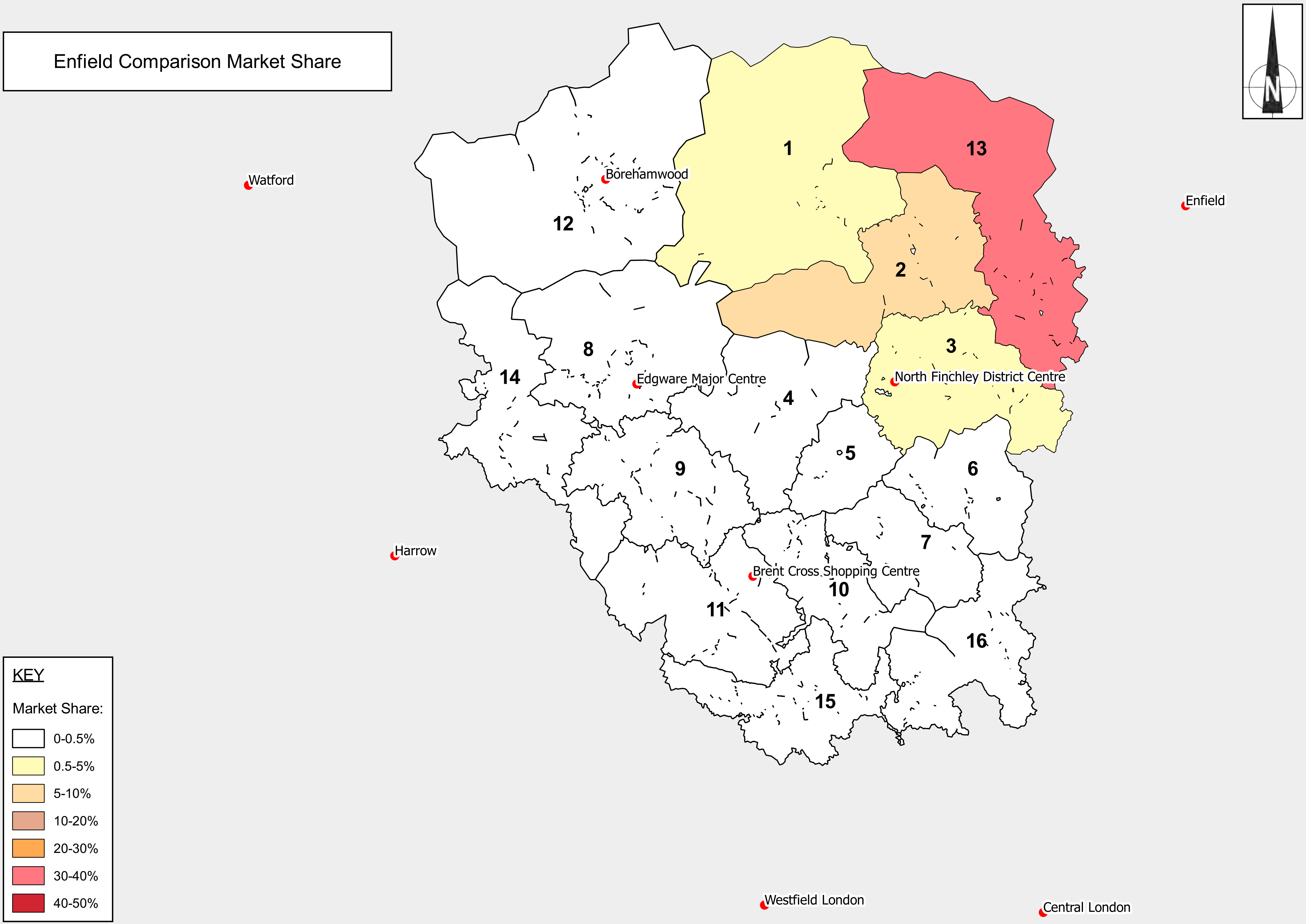


KEY

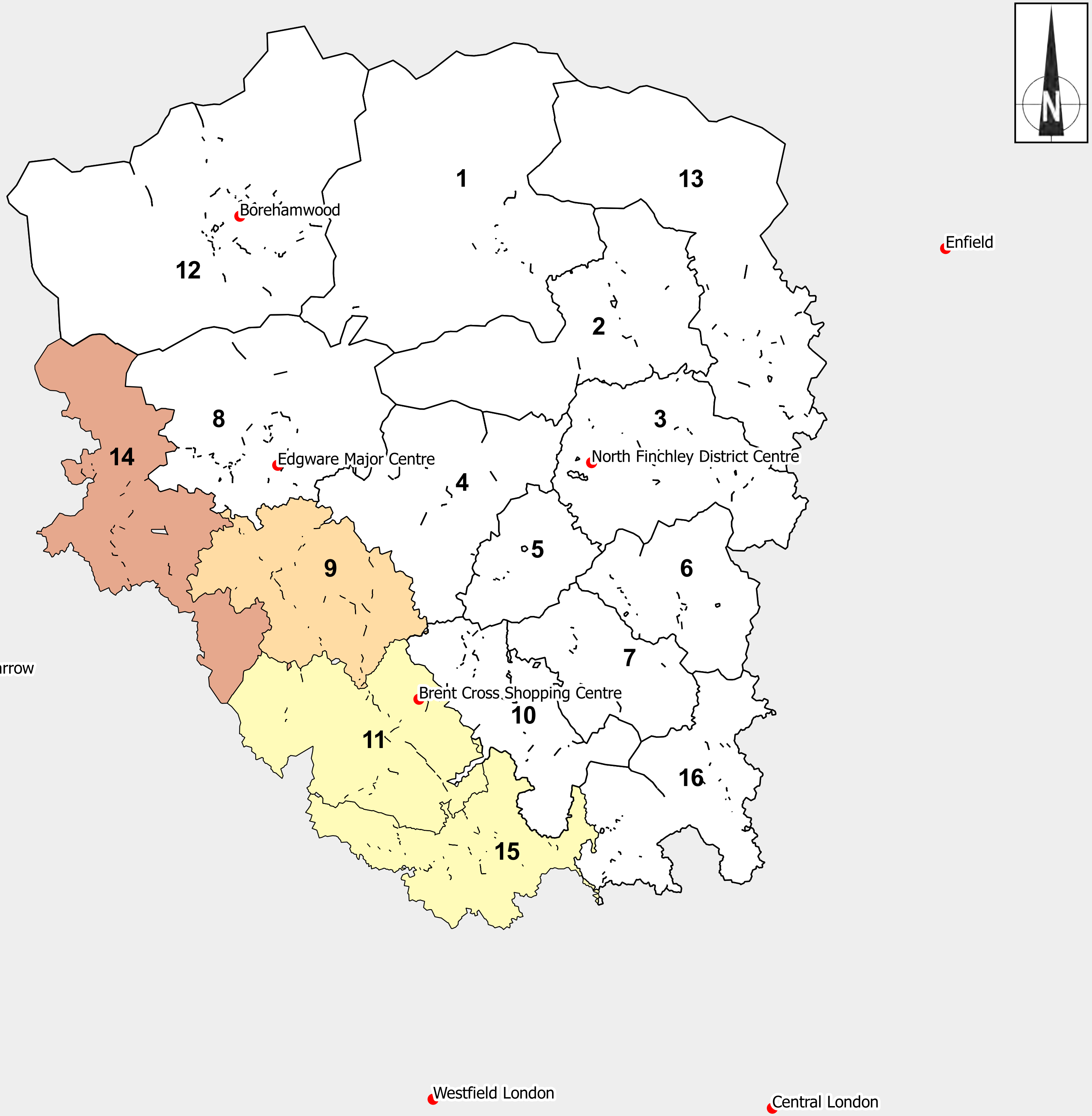
Market Share:

- 0-0.5%
- 0.5-5%
- 5-10%
- 10-20%
- 20-30%
- 30-40%
- 40-50%

Enfield Comparison Market Share



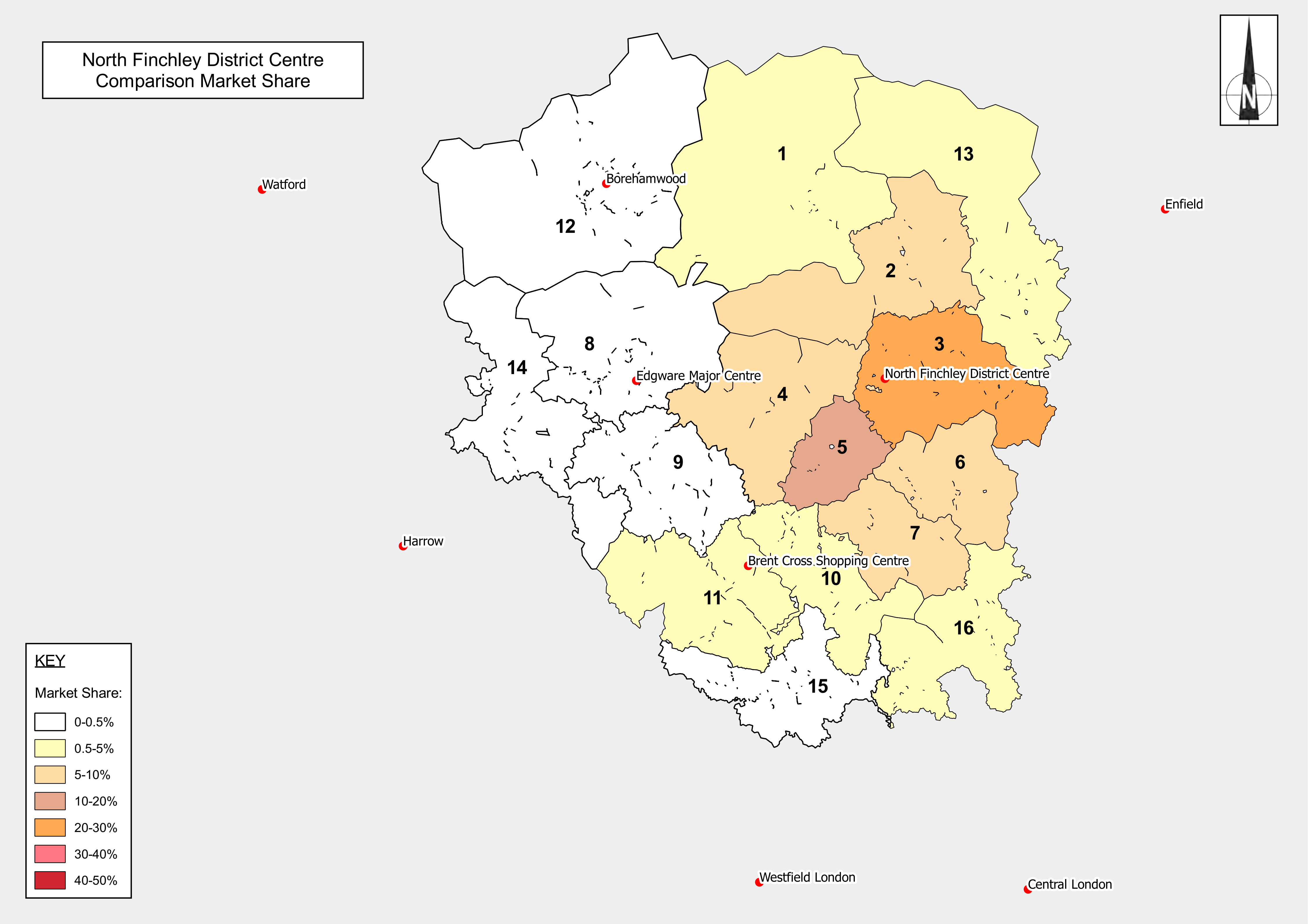
Harrow Comparison Market Share



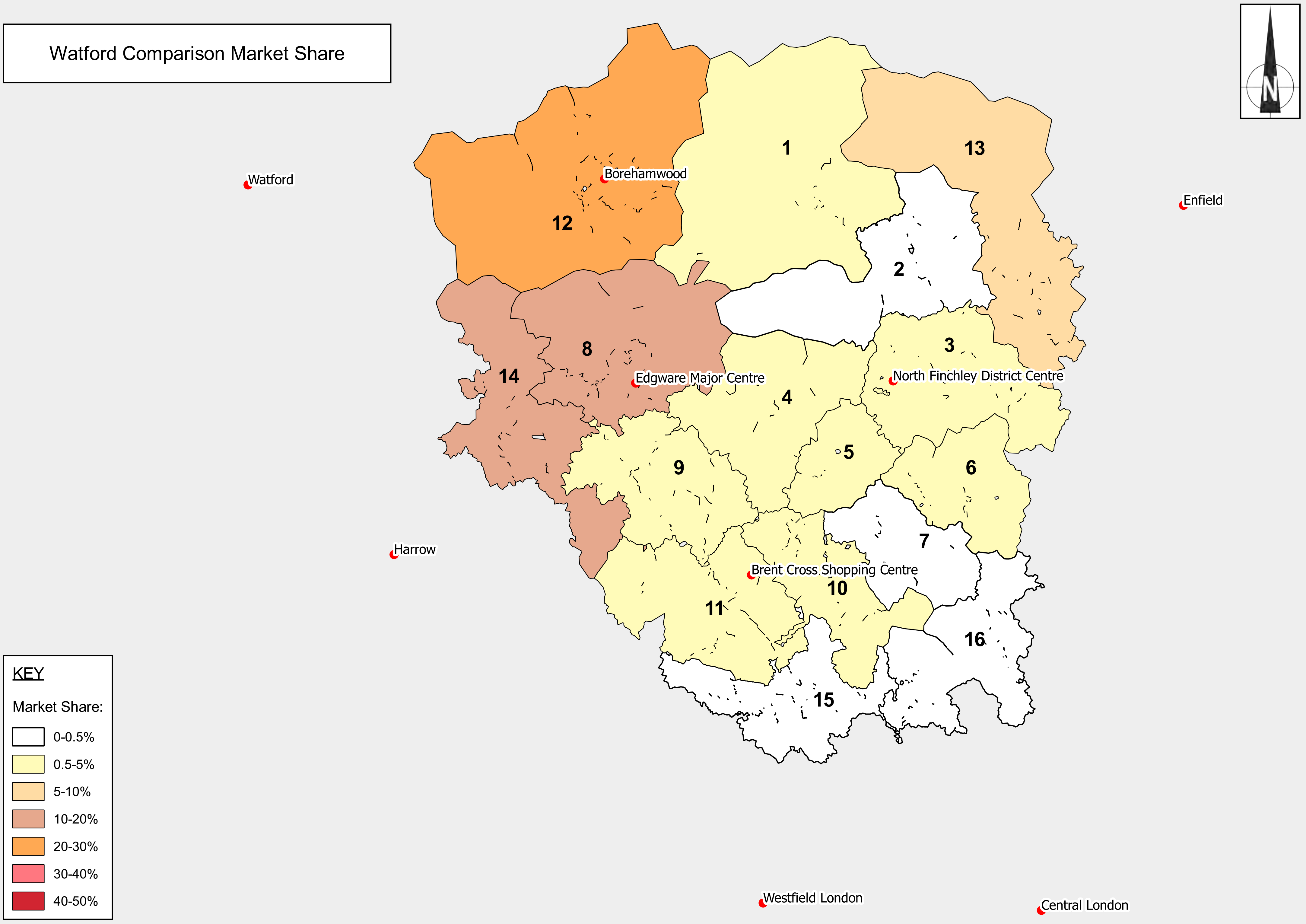
KEY

Market Share:

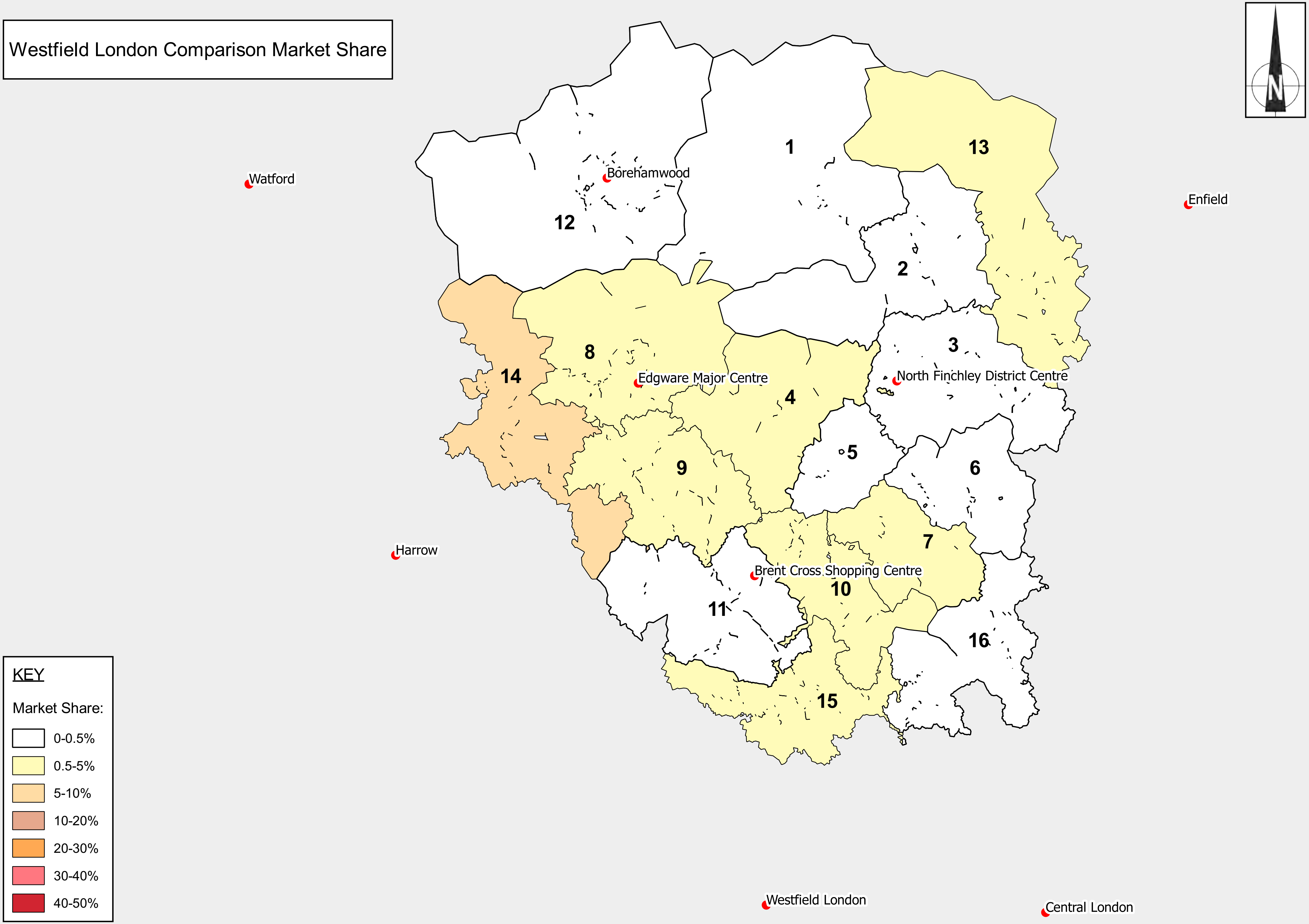
- 0-0.5%
- 0.5-5%
- 5-10%
- 10-20%
- 20-30%
- 30-40%
- 40-50%



North Finchley District Centre
Comparison Market Share
Watford
Borehamwood
Enfield
Edgware Major Centre
North Finchley District Centre
Harrow
Brent Cross Shopping Centre
Westfield London
Central London
1
2
3
4
5
6
7
8
9
10
11
12
13
14
15
16
N
KEY
Market Share:
0-0.5%
0.5-5%
5-10%
10-20%
20-30%
30-40%
40-50%



Watford Comparison Market Share
1
2
3
4
5
6
7
8
9
10
11
12
13
14
15
16
Watford
Borehamwood
Enfield
Edgware Major Centre
North Finchley District Centre
Harrow
Brent Cross Shopping Centre
Westfield London
Central London
N
KEY
Market Share:
0-0.5%
0.5-5%
5-10%
10-20%
20-30%
30-40%
40-50%



Westfield London Comparison Market Share
N
1
2
3
4
5
6
7
8
9
10
11
12
13
14
15
16
Watford
Borehamwood
Enfield
Edgware Major Centre
North Finchley District Centre
Harrow
Brent Cross Shopping Centre
Westfield London
Central London
KEY
Market Share:
0-0.5%
0.5-5%
5-10%
10-20%
20-30%
30-40%
40-50%

APPENDIX F COMPARISON MARKET SHARES OF KEY CENTRES BETWEEN 2008 AND 2017

Figure 1 Brent Cross shopping centre 2008 and 2017 comparison market shares

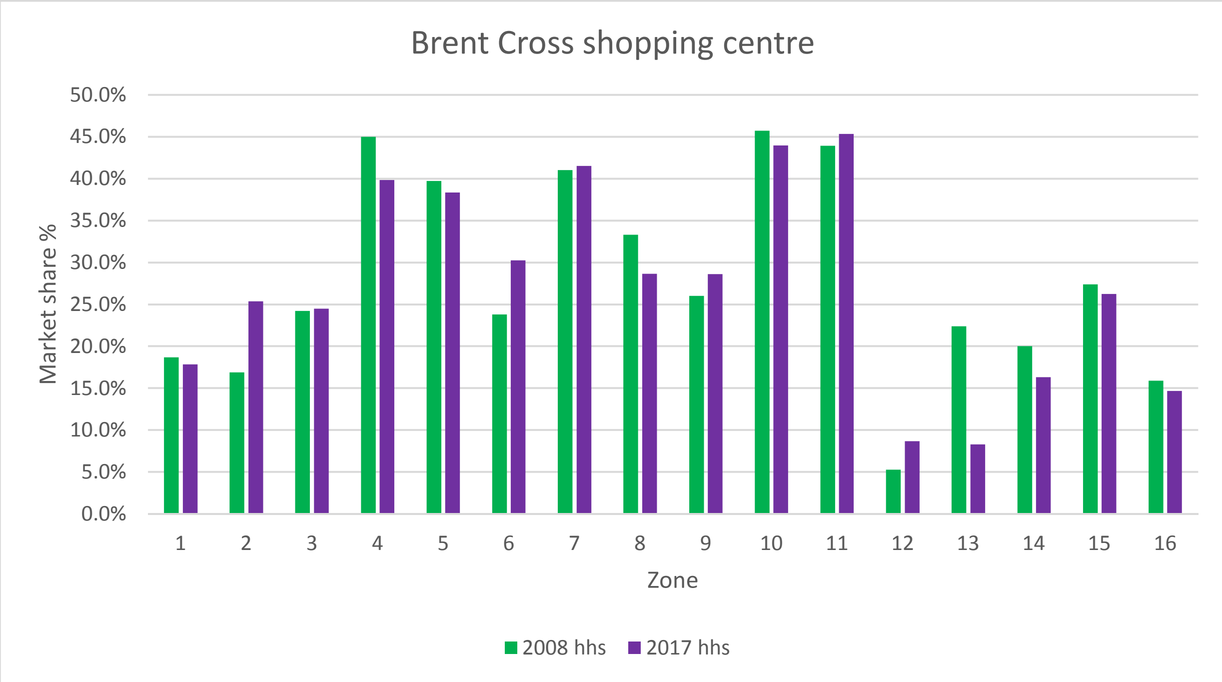


Table 1 Brent Cross shopping centre 2008 and 2017 comparison market shares

	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
2008 hhs	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%
2017 hhs	17.8%	25.4%	24.5%	39.8%	38.4%	30.3%	41.5%	28.6%	28.6%	43.9%	45.3%	8.7%	8.3%	16.3%	26.2%	14.7%
Change	**-0.9%**	**8.5%**	**0.3%**	**-5.2%**	**-1.3%**	**6.5%**	**0.5%**	**-4.7%**	**2.6%**	**-1.8%**	**1.4%**	**3.4%**	**-14.1%**	**-3.7%**	**-1.2%**	**-1.2%**

Figure 2 Edgware major centre 2008 and 2017 comparison market shares

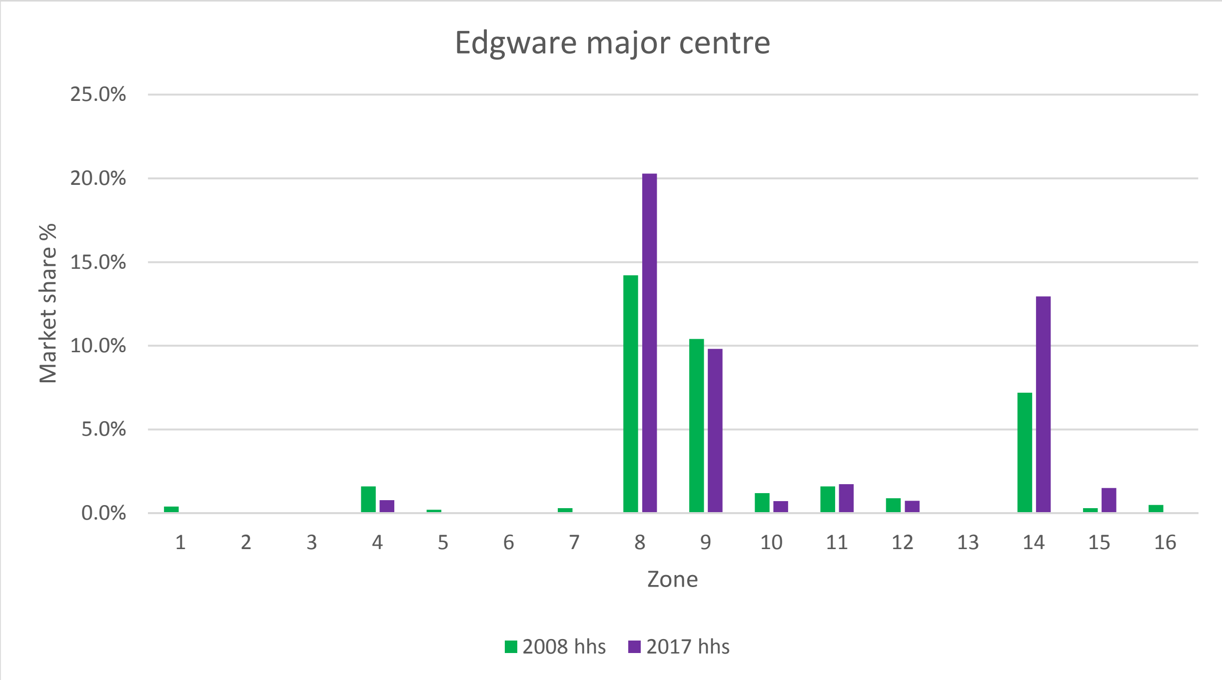


Table 2 Edgware major centre 2008 and 2017 comparison market shares

	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
2008 hhs	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%
2017 hhs	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%	0.0%	20.3%	9.8%	0.7%	1.7%	0.7%	0.0%	12.9%	1.5%	0.0%
Change	**-0.4%**	**0.0%**	**0.0%**	**-0.8%**	**-0.2%**	**0.0%**	**-0.3%**	**6.1%**	**-0.6%**	**-0.5%**	**0.1%**	**-0.2%**	**0.0%**	**5.7%**	**1.2%**	**-0.5%**

Figure 3 North Finchley district centre 2008 and 2017 comparison market shares

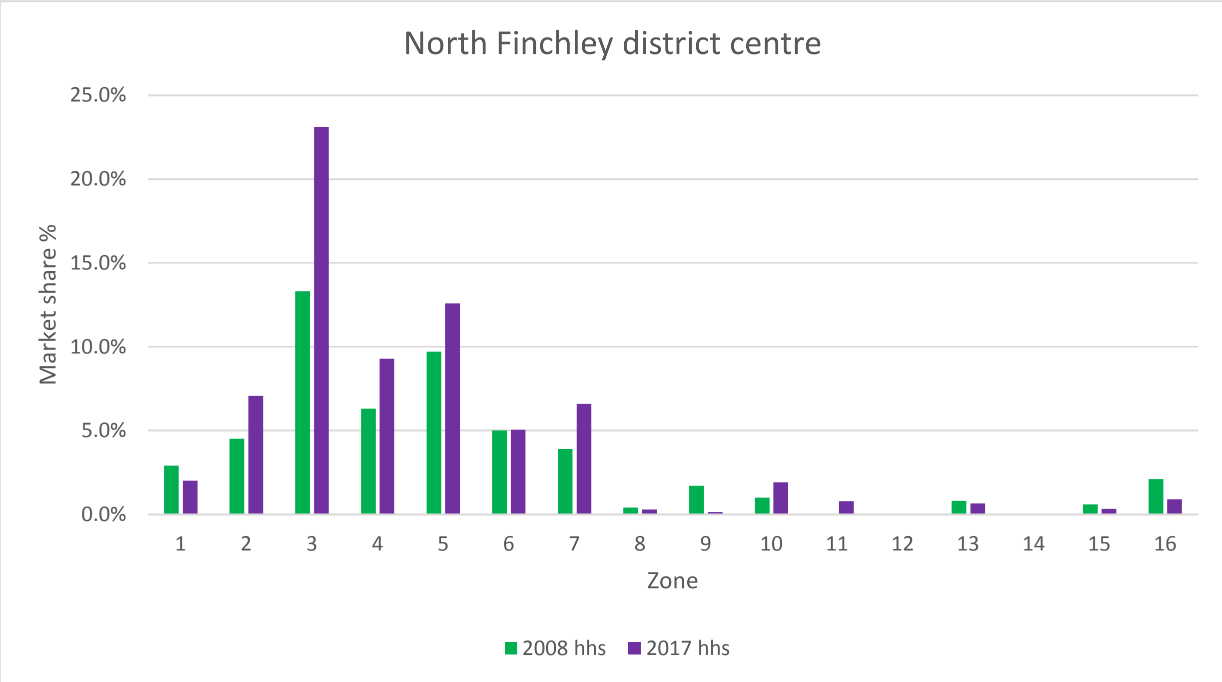


Table 3 North Finchley district centre 2008 and 2017 comparison market shares

	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
2008 hhs	2.9%	4.5%	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%
2017 hhs	2.0%	7.1%	23.1%	9.3%	12.6%	5.0%	6.6%	0.3%	0.1%	1.9%	0.8%	0.0%	0.7%	0.0%	0.3%	0.9%
Change	**-0.9%**	**2.6%**	**9.8%**	**3.0%**	**2.9%**	**0.0%**	**2.7%**	**-0.1%**	**-1.6%**	**0.9%**	**0.8%**	**0.0%**	**-0.1%**	**0.0%**	**-0.3%**	**-1.2%**

APPENDIX G COMPARISON TURNOVER OF LBB DESTINATIONS AND COMPETING CENTRES IN 2008 AND 2017

Table 1 LBB and competing centres retail rankings

Destination	Location grade	2007 Score	Rank	2011 Score	Rank	2015 Score	Rank	Change 2007-2015 Score	Change 2007-2015 Rank
London Oxford St	Major City	297	11	350	19	502	10	205	1
Westfield White City	Major Regional	-	-	295	24	343	23	48	1
Watford	Major Regional	40	204	240	47	266	46	226	158
Harrow	Regional	120	138	166	118	189	99	69	39
Brent Cross	Regional	127	146	147	149	188	100	61	46
Wood Green	Regional	134	133	157	136	186	105	52	28
Enfield	Sub-Regional	90	241	131	180	131	191	41	50
Edgware	Sub-Regional	67	336	88	300	91	297	24	39
Borehamwood	Sub-Regional	34	700	39	737	99	267	65	433
North Finchley*	Major District	76	297	93	279	67	429	-9	-132

Source: Javelin 2007, 2011, 2015

Table 2 LBB and competing centres average rents (£ per sqft)

Destination	Designation	2009	2010	2011	2012	2013	2014	2015	2016	Change 2009-2016 £	Change 2009-2016 %
Edgware	Major	17.75	25.42	28.46	30.08	28.86	28.88	35.99	36.33	18.58	105%
Borehamwood	Town	0	0	25.21	24.17	24.17	26.63	20.77	23.76	23.76	94%
Harrow	Metropolitan	20.93	31.83	30.15	31.4	37.62	40.86	37.27	37.05	16.12	77%
Watford	Town	0	0	33.93	24.36	24.19	24.55	28.37	23.58	23.58	69%
London West End	International	36.97	40.58	49.61	60.42	61.82	60.81	57.98	59.01	22.04	60%
North Finchley	District	18.39	20.74	21.52	22.16	28.7	23.44	22.22	23.42	5.03	27%
Westfield White City	Metropolitan	205.5	204.1	161.26	211.71	213.25	213.25	213.25	213.25	7.75	4%
Enfield	Major	36.69	41.95	43.75	41.47	43.22	40.76	42.37	35.78	-0.91	-2%
Wood Green	Metropolitan	30.85	28.63	30.03	30.01	31.66	33.22	18.15	17.2	-13.65	-44%
Brent Cross Shopping Centre	Major SC	175.52	184.6	191.14	189.02	167.84	137.24	90.14	90.14	-85.38	-49%

Source: Co-Star 2017

Table 3 LBB and competing centres comparison goods trade draw £m

Destination	2008	2017	Change £m	Change %
Westfield London	-	26.9	26.9	-
Enfield Town centre	32.3	63.3	31.0	96%
Edgware major centre	48.4	76.4	28.0	58%
North Finchley district centre	66.1	103.1	37.0	56%
Borehamwood centre	44.3	65.7	21.3	48%
Wood Green centre	22.0	28.2	6.2	28%
Harrow town centre	35.3	44.5	9.2	26%
Brent Cross Shopping Centre	556.3	654.7	98.4	18%
Watford	73.2	84.5	11.3	15%
Central London/West End	294.7	63.3	-231.5	-79%

PBA based on NEMS household survey 2017 and 2008

Table 4 LBB and competing centres comparison goods trade draw %

Destination	2008	2017	Change %
Westfield London	-	1.1%	-
Enfield Town centre	1.5%	2.6%	1.0%
North Finchley district centre	3.2%	4.2%	1.0%
Edgware major centre	2.3%	3.1%	0.8%
Borehamwood centre	2.1%	2.7%	0.5%
Harrow town centre	1.7%	1.8%	0.1%
Wood Green centre	1.1%	1.1%	0.1%
Watford	3.5%	3.4%	-0.1%
Brent Cross Shopping Centre	26.7%	26.6%	-0.1%
Central London/West End	14.2%	2.6%	-11.6%

PBA based on NEMS household survey 2017 and 2008

APPENDIX H QUANTITATIVE RETAIL CAPACITY

Table 1: Population

	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	Total
2016	32,175	38,475	65,991	28,700	27,759	43,534	22,270	44,467	73,946	43,521	59,557	39,295	37,032	49,890	85,332	70,462	762,406
2017	32,612	38,998	66,887	29,090	28,136	44,125	22,573	45,071	74,950	44,112	60,366	39,775	37,514	50,411	86,306	71,272	772,199
2018	33,043	39,513	67,771	29,474	28,508	44,708	22,871	45,666	75,940	44,695	61,163	40,270	37,994	50,969	87,265	72,016	781,863
2019	33,463	40,016	68,634	29,849	28,871	45,277	23,162	46,248	76,907	45,264	61,942	40,745	38,454	51,480	88,145	72,679	791,136
2020	33,878	40,511	69,484	30,219	29,228	45,838	23,449	46,820	77,860	45,824	62,709	41,251	38,944	52,007	88,918	73,313	800,253
2021	34,282	40,994	70,312	30,579	29,577	46,385	23,728	47,379	78,788	46,371	63,457	41,759	39,450	52,528	89,760	73,915	809,263
2022	34,671	41,460	71,111	30,927	29,913	46,911	23,998	47,917	79,683	46,897	64,178	42,254	39,924	53,007	90,525	74,499	817,874
2023	35,050	41,913	71,888	31,265	30,240	47,424	24,260	48,441	80,554	47,410	64,879	42,716	40,388	53,499	91,247	75,034	826,207
2024	35,417	42,352	72,641	31,592	30,556	47,921	24,514	48,948	81,398	47,907	65,559	43,192	40,812	53,960	91,935	75,584	834,290
2025	35,771	42,776	73,367	31,908	30,862	48,400	24,759	49,437	82,211	48,386	66,214	43,630	41,205	54,419	92,572	76,164	842,081
2026	36,114	43,186	74,071	32,214	31,158	48,864	24,997	49,911	83,000	48,850	66,849	44,058	41,601	54,863	93,236	76,710	849,682
2027	36,448	43,585	74,755	32,512	31,446	49,316	25,228	50,373	83,767	49,301	67,467	44,486	41,985	55,291	93,800	77,291	857,049
2028	36,776	43,977	75,427	32,804	31,728	49,759	25,454	50,825	84,520	49,744	68,073	44,935	42,383	55,728	94,346	77,829	864,309
2029	37,095	44,358	76,081	33,088	32,003	50,191	25,675	51,266	85,253	50,176	68,664	45,364	42,768	56,132	94,915	78,347	871,375
2030	37,405	44,729	76,717	33,365	32,271	50,610	25,890	51,695	85,965	50,595	69,238	45,786	43,142	56,515	95,458	78,859	878,240
2031	37,708	45,091	77,339	33,635	32,533	51,020	26,100	52,114	86,662	51,005	69,799	46,199	43,550	56,873	95,992	79,383	885,004
2032	38,010	45,453	77,959	33,905	32,793	51,429	26,309	52,532	87,357	51,414	70,358	46,590	43,938	57,226	96,461	79,901	891,637
2033	38,310	45,811	78,574	34,172	33,052	51,835	26,516	52,946	88,045	51,819	70,913	47,174	44,489	57,866	97,534	80,979	900,035
2034	38,604	46,163	79,177	34,435	33,306	52,233	26,720	53,352	88,722	52,217	71,458	47,570	44,845	58,242	98,037	81,438	906,519
2035	38,891	46,507	79,766	34,691	33,554	52,622	26,919	53,749	89,382	52,606	71,989	47,980	45,182	58,584	98,550	81,896	912,868
2036	39,172	46,842	80,343	34,942	33,796	53,002	27,113	54,138	90,028	52,986	72,509	48,437	45,611	59,042	99,246	82,498	919,704
Growth 2017-36	6,560	7,845	13,455	5,852	5,660	8,876	4,541	9,067	15,077	8,874	12,143	8,662	8,097	8,631	12,940	11,226	147,505

Source:

2016 population: Experian MMG3 2016 (2014-based SNPP)

Growth for zones 1-11 (LB Barnet) derived from GLA 2016-based Demographic Projections (local authority population projections - Trend projections, Central migration scenario)

Growth for zones 12-16 derived from Experian MMG3 2016 (2014-based SNPP)

Table 2: Commitments - turnover in 2017

Comparison

Zone		Net floorspace (sqm)	Turnover (£M)
3	837-839 High Road North Finchley	226	£1.36
3	1412-1420 High Road, Whetstone	101	£0.61
4	Millbrook Park (Former Inglis Barracks)	385	£2.31
9	Peel Centre (Colindale Gardens)	3,950	£23.70
11	Brent Cross Cricklewood regeneration	30,081	£180.49
11	West Hendon regeneration	618	£3.71
11	Unit 2 and 3 Staples Corner Retail Park	2,156	£12.94
11	117 - 125 West Hendon Broadway	219	£1.31
11	Staples Corner Retail Park	886	£5.31
15	194-196 Cricklewood Broadway	838	£5.03
Total		**39,459**	**£236.76**

Convenience

Zone		Net floorspace (sqm)	Turnover (£M)
3	1412-1420 High Road, Whetstone	101	£1.21
4	Millbrook Park (Former Inglis Barracks)	385	£4.62
9	Peel Centre (Colindale Gardens)	3,950	£47.40
11	Brent Cross Cricklewood regeneration	8,146	£97.75
11	West Hendon regeneration	618	£7.42
11	117 - 125 West Hendon Broadway	219	£2.62
15	194-196 Cricklewood Broadway	1,257	£14.36
Total		**13,419**	**£175.39**

Notes

Source: LB Barnet online planning register

Assumptions: 70:30 net to gross ratio applied unless stated otherwise in planning application documents

Threshold of 250sq.m adopted for the consideration of planning commitments

Table 3a : Comparison expenditure

Per capita comparison expenditure

	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
2016	£3,664	£4,122	£3,423	£3,897	£4,116	£3,974	£4,574	£3,708	£2,872	£4,101	£3,027	£3,157	£4,309	£3,277	£3,457	£4,191
Exc. SFT	£3,180	£3,578	£2,971	£3,383	£3,573	£3,449	£3,970	£3,219	£2,493	£3,560	£2,627	£2,740	£3,740	£2,844	£3,001	£3,638
2017	£3,203	£3,603	£2,992	£3,406	£3,598	£3,474	£3,998	£3,241	£2,510	£3,585	£2,646	£2,759	£3,766	£2,864	£3,022	£3,663
2021	£3,436	£3,865	£3,210	£3,654	£3,859	£3,726	£4,289	£3,477	£2,693	£3,845	£2,838	£2,960	£4,040	£3,073	£3,241	£3,930
2026	£4,010	£4,511	£3,746	£4,265	£4,504	£4,349	£5,006	£4,058	£3,143	£4,488	£3,313	£3,455	£4,716	£3,586	£3,783	£4,587
2031	£4,676	£5,260	£4,368	£4,973	£5,252	£5,071	£5,837	£4,732	£3,665	£5,233	£3,863	£4,029	£5,499	£4,182	£4,411	£5,348
2036	£5,494	£6,181	£5,133	£5,844	£6,172	£5,959	£6,859	£5,560	£4,307	£6,150	£4,539	£4,734	£6,462	£4,914	£5,184	£6,285

Comparison expenditure £M

	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	LBB total (Z1-11)	Outside LBB	Total
2016	£102.33	£137.66	£196.07	£97.08	£99.17	£150.17	£88.42	£143.12	£184.34	£154.92	£156.48	£107.68	£138.51	£141.91	£256.05	£256.33	£1,509.76	£900.48	£2,410.23
2017	£104.44	£140.51	£200.12	£99.09	£101.23	£153.27	£90.25	£146.08	£188.15	£158.12	£159.72	£109.76	£141.29	£144.39	£260.79	£261.09	£1,540.98	£917.32	£2,458.30
2021	£117.78	£158.44	£225.67	£111.74	£114.15	£172.84	£101.76	£164.72	£212.17	£178.31	£180.10	£123.61	£159.39	£161.40	£290.95	£290.46	£1,737.67	£1,025.81	£2,763.48
2026	£144.81	£194.81	£277.48	£137.39	£140.35	£212.51	£125.13	£202.54	£260.87	£219.24	£221.45	£152.22	£196.18	£196.76	£352.74	£351.84	£2,136.59	£1,249.73	£3,386.31
2031	£176.31	£237.18	£337.82	£167.27	£170.87	£258.73	£152.34	£246.59	£317.61	£266.92	£269.61	£186.12	£239.47	£237.83	£423.47	£424.55	£2,601.27	£1,511.43	£4,112.71
2036	£215.23	£289.54	£412.40	£204.19	£208.60	£315.85	£185.97	£301.03	£387.73	£325.85	£329.13	£229.31	£294.72	£290.13	£514.49	£518.47	£3,175.51	£1,847.12	£5,022.63
Growth 2017-2036	£110.78	£149.04	£212.27	£105.10	£107.37	£162.58	£95.72	£154.95	£199.57	£167.72	£169.41	£119.55	£153.43	£145.74	£253.70	£257.38	£1,634.53	£929.80	£2,564.33

Table 4a: Comparison market shares

	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
Zone 1																
Chipping Barnet district centre	21.7%	6.1%	0.4%	0.0%	0.3%	0.2%	0.1%	0.5%	0.0%	0.0%	0.0%	0.0%	1.3%	0.0%	0.0%	0.0%
Zone 1 Total	21.7%	6.1%	0.4%	0.0%	0.3%	0.2%	0.1%	0.5%	0.0%	0.0%	0.0%	0.0%	1.3%	0.0%	0.0%	0.0%
Zone 2																
East Barnet Village local centre	0.5%	3.8%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Great North Road local centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
New Barnet district centre	6.2%	3.7%	0.6%	1.5%	0.9%	0.0%	0.0%	0.6%	0.8%	0.9%	0.3%	0.0%	0.4%	0.0%	0.0%	0.0%
Zone 2 Total	6.7%	7.5%	0.7%	1.5%	0.9%	0.0%	0.0%	0.6%	0.8%	0.9%	0.3%	0.0%	0.4%	0.0%	0.0%	0.0%
Zone 3																
North Finchley district centre	2.0%	7.1%	23.1%	9.3%	12.6%	5.0%	6.6%	0.3%	0.1%	1.9%	0.8%	0.0%	0.7%	0.0%	0.3%	0.9%
Whetstone district centre	1.3%	7.2%	4.4%	1.0%	0.0%	1.1%	0.5%	0.0%	0.1%	0.0%	0.0%	0.0%	1.0%	0.4%	0.0%	0.0%
Friern Barnet local centre	1.0%	3.1%	4.7%	1.5%	2.7%	1.3%	0.3%	0.4%	0.0%	0.0%	0.0%	0.0%	1.8%	0.4%	0.0%	0.1%
Friern Barnet Retail Park	2.3%	5.2%	10.3%	4.8%	1.9%	8.3%	3.0%	0.3%	0.5%	0.3%	0.0%	0.0%	7.3%	0.0%	0.8%	0.0%
Great North Leisure Park	0.0%	0.0%	0.7%	0.1%	0.6%	2.0%	0.0%	0.0%	0.0%	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Homebase New Southgate	0.0%	0.2%	0.1%	0.0%	0.1%	0.2%	0.8%	0.0%	0.0%	0.0%	0.1%	0.0%	0.4%	0.0%	0.0%	0.0%
Other Zone 3	0.0%	0.0%	0.9%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 3 Total	6.7%	22.8%	44.2%	16.7%	17.9%	17.9%	11.3%	1.0%	0.8%	2.2%	2.1%	0.0%	11.0%	0.8%	1.1%	1.0%
Zone 4																
Mill Hill district centre	0.1%	0.5%	0.0%	2.9%	0.6%	0.3%	0.4%	6.4%	0.2%	0.0%	0.4%	0.0%	0.5%	0.0%	0.0%	0.3%
Holders Hill Circus local centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other Zone 4	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 4 Total	0.1%	0.5%	0.0%	2.9%	0.6%	0.3%	0.4%	6.4%	0.2%	0.0%	0.4%	0.0%	0.5%	0.0%	0.0%	0.3%
Zone 5																
Finchley Church End district centre	0.0%	0.1%	1.1%	1.7%	9.8%	0.3%	0.4%	0.0%	0.2%	0.4%	0.3%	0.0%	0.1%	0.0%	0.2%	0.4%
Zone 5 Total	0.0%	0.1%	1.1%	1.7%	9.8%	0.3%	0.4%	0.0%	0.2%	0.4%	0.3%	0.0%	0.1%	0.0%	0.2%	0.4%
Zone 6																
East Finchley district centre	0.5%	0.0%	0.4%	0.5%	2.4%	5.1%	2.4%	0.0%	0.0%	0.3%	0.1%	0.2%	0.0%	0.0%	0.7%	0.3%
Colney Hatch Lane local centre	0.0%	0.0%	0.8%	0.6%	0.0%	0.6%	0.0%	0.1%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Muswell Hill district centre (LB Haringay)	0.1%	0.5%	2.7%	0.0%	0.0%	19.3%	5.1%	0.0%	0.2%	0.1%	0.0%	0.0%	0.3%	0.0%	0.0%	1.0%
Zone 6 Total	0.6%	0.5%	3.9%	1.1%	2.4%	24.9%	7.6%	0.1%	0.3%	0.3%	0.1%	0.2%	0.3%	0.0%	0.7%	1.3%
Zone 7																
Other Zone 7	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 7 Total	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 8																
Edgware major centre	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%	0.0%	20.3%	9.8%	0.7%	1.7%	0.7%	0.0%	12.9%	1.5%	0.0%
Apex Corner local centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Deansbrook Road local centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Hale Lane local centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 8 Total	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%	0.0%	20.4%	9.8%	0.7%	1.7%	0.7%	0.0%	12.9%	1.5%	0.0%
Zone 9																
Burnt Oak district centre	0.0%	0.3%	0.0%	0.2%	0.0%	0.0%	0.0%	0.1%	2.2%	0.2%	0.3%	0.0%	0.0%	0.2%	0.0%	0.0%
Colindale district centre	0.0%	0.3%	0.0%	0.6%	0.2%	0.0%	0.0%	1.8%	12.9%	2.0%	3.3%	0.0%	0.0%	2.5%	0.4%	0.0%
Grahame Park local centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
The Hyde Retail Park	0.0%	0.0%	0.0%	0.6%	0.1%	0.0%	0.0%	0.4%	2.1%	1.6%	1.8%	0.2%	0.0%	0.3%	0.1%	0.4%
Queensbury (LB Brent)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.3%	0.0%	0.0%	0.0%	0.0%	0.7%	0.1%	0.0%
Zone 9 Total	0.0%	0.5%	0.0%	1.4%	0.4%	0.0%	0.0%	2.6%	17.5%	3.7%	5.4%	0.2%	0.0%	3.7%	0.7%	0.4%
Zone 10																
Golders Green district centre	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	1.6%	0.1%	0.0%	3.9%	0.6%	0.0%	0.1%	0.0%	1.0%	0.3%
Temple Fortune district centre	0.0%	0.0%	1.5%	0.5%	4.7%	0.1%	8.0%	0.0%	0.0%	3.5%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%
Brent Street local centre	0.0%	0.0%	0.9%	0.3%	0.2%	0.0%	0.4%	1.5%	0.2%	0.5%	1.0%	0.0%	0.1%	0.8%	2.1%	1.1%
Childs Hill local centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.1%	0.0%	0.0%	0.0%	0.8%	0.0%
Golders Green Road local centre	0.0%	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%	0.0%	0.1%	8.7%	0.3%	0.0%	0.1%	0.0%	0.3%	0.1%
Zone 10 Total	0.0%	0.1%	2.4%	0.8%	5.7%	0.1%	10.0%	1.6%	0.3%	16.7%	2.0%	0.0%	0.4%	0.8%	4.2%	1.6%
Zone 11																
Brent Cross Shopping Centre	17.8%	25.4%	24.5%	39.8%	38.4%	30.3%	41.5%	28.6%	28.6%	43.9%	45.3%	8.7%	8.3%	16.3%	26.2%	14.7%
Hendon Central district centre	0.0%	0.0%	0.0%	1.6%	0.8%	0.0%	0.3%	0.1%	3.2%	0.7%	3.4%	0.4%	0.0%	0.6%	0.1%	0.2%
West Hendon local centre	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%	0.0%	0.1%	0.0%	0.0%
Broadway Retail Park	0.0%	0.0%	0.0%	0.4%	0.1%	0.1%	0.0%	0.5%	0.3%	0.8%	1.6%	0.0%	0.0%	0.0%	0.7%	0.1%
Silkbridge Retail Park	0.0%	0.0%	0.0%	0.3%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	1.0%	0.0%	0.2%	0.0%	0.0%	0.0%
Staples Corner	0.1%	0.2%	0.0%	1.4%	0.3%	1.0%	0.2%	1.5%	4.1%	2.8%	11.6%	0.3%	0.0%	2.1%	2.3%	0.3%
Toys R Us Tilling Rd	0.0%	0.0%	0.0%	0.5%	0.7%	0.0%	2.9%	0.5%	0.0%	1.9%	1.0%	0.0%	0.5%	0.7%	2.0%	0.0%
Other Zone 11	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%
Zone 11 Total	17.9%	25.6%	24.5%	44.0%	40.2%	31.4%	45.0%	31.2%	36.4%	50.1%	64.2%	9.4%	9.1%	19.7%	31.4%	15.3%
Zone 12																
Borehamwood	10.7%	1.0%	0.9%	0.4%	0.2%	0.0%	0.5%	4.0%	0.1%	0.0%	0.1%	39.4%	0.0%	0.4%	0.0%	0.0%
Borehamwood Shopping Park	4.4%	1.0%	0.0%	0.1%	0.0%	0.0%	0.0%	3.9%	0.0%	0.0%	0.6%	11.6%	0.0%	0.3%	0.0%	0.0%
Stirling Retail Park	0.2%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.8%	0.0%	0.0%	0.0%	0.0%
Other Zone 12	0.0%	0.0%	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%
Zone 12 Total	15.2%	2.1%	0.9%	0.5%	0.2%	0.0%	0.5%	7.9%	0.2%	0.0%	0.8%	52.0%	0.0%	0.7%	0.0%	0.0%
Zone 13																
Hampden Square local centre	0.0%	0.0%	0.0%	0.2%	0.0%	0.2%	1.0%	0.0%	0.2%	0.7%	0.1%	0.0%	0.1%	0.0%	0.0%	0.0%
Southgate centre	0.3%	1.0%	0.9%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.2%	9.9%	0.0%	0.0%	0.0%
Other Zone 13	0.0%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%	0.0%	0.0%	0.0%
Zone 13 Total	0.3%	1.4%	0.9%	0.2%	0.0%	0.3%	1.1%	0.0%	0.2%	0.7%	0.1%	0.2%	10.8%	0.0%	0.0%	0.0%
Zone 14																
Kingsbury district centre (LB Brent)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.4%	0.0%	0.5%	0.0%	0.0%	0.5%	0.0%	0.0%
Stanmore district centre (LB Harrow)	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.3%	0.0%	0.0%
B&Q Honeypot Lane	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	0.3%	0.0%	0.0%	0.0%	0.0%	1.0%	0.0%	0.0%
Zone 14 Total	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.5%	1.7%	0.0%	0.5%	0.0%	0.0%	4.8%	0.0%	0.0%
Zone 15																
Cricklewood district centre	0.0%	0.0%	0.0%	0.5%	0.1%	0.1%	0.1%	0.5%	0.9%	2.5%	3.4%	0.0%	0.0%	0.1%	6.2%	2.6%
Finchley Road Swiss Cottage district centre (LBC)	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	0.0%	0.0%	0.0%	0.0%	0.9%	0.8%
Kilburn district centre (LBC)	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.1%	0.1%	0.2%	2.5%	0.0%	0.0%	0.0%	8.3%	2.6%
West Hampstead district centre (LB Camden)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	6.3%	0.1%
Willesden (LB Brent)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.2%	0.0%	0.0%	0.0%	2.9%	0.0%
Other Zone 15	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 15 Total	0.0%	0.0%	0.0%	0.7%	0.1%	0.1%	0.1%	0.7%	1.0%	3.1%	6.1%	0.0%	0.0%	0.1%	24.7%	6.0%
Zone 16																
Belsize Park (LBC)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	2.1%
Hampstead (LBC)	0.0%	0.0%	0.2%	0.0%	0.8%	0.0%	1.7%	0.9%	0.0%	3.2%	0.0%	0.0%	0.0%	0.5%	1.9%	2.7%
Highgate (LBC)	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%	2.5%
Kentish Town (LBC)	0.0%	0.0%	0.3%	0.0%	0.0%	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	6.8%
Other Zone 16	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.2%
Zone 16 Total	0.0%	0.0%	0.5%	0.0%	0.8%	0.0%	4.1%	0.9%	0.0%	3.2%	0.0%	0.0%	0.0%	0.5%	1.9%	15.3%
Study area sub-total	69.2%	67.1%	79.5%	72.4%	79.4%	75.5%	80.6%	74.3%	69.4%	82.2%	84.1%	62.7%	33.8%	44.1%	66.4%	41.7%
Destinations outside the study area	30.8%	32.9%	20.5%	27.6%	20.6%	24.5%	19.4%	25.7%	30.6%	17.8%	15.9%	37.3%	66.2%	55.9%	33.6%	58.3%
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%

Table 4a : Comparison turnover 2017 (£M)

	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	Total
Zone 1																	
Chipping Barnet district centre	£22.66	£8.62	£0.88	£0.00	£0.27	£0.26	£0.13	£0.78	£0.00	£0.00	£0.00	£0.00	£1.88	£0.00	£0.00	£0.00	£35.48
Zone 1 Total	£22.66	£8.62	£0.88	£0.00	£0.27	£0.26	£0.13	£0.78	£0.00	£0.00	£0.00	£0.00	£1.88	£0.00	£0.00	£0.00	£35.48
Zone 2																	
East Barnet Village local centre	£0.50	£5.32	£0.27	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.01	£0.00	£0.00	£0.00	£6.10
Great North Road local centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
New Barnet district centre	£6.47	£5.24	£1.13	£1.44	£0.86	£0.00	£0.00	£0.87	£1.52	£1.41	£0.45	£0.00	£0.52	£0.00	£0.00	£0.00	£19.90
Zone 2 Total	£6.97	£10.55	£1.40	£1.44	£0.86	£0.00	£0.00	£0.87	£1.52	£1.41	£0.45	£0.00	£0.54	£0.00	£0.00	£0.00	£26.00
Zone 3																	
North Finchley district centre	£2.09	£9.92	£46.25	£9.19	£12.73	£7.72	£5.95	£0.42	£0.26	£3.01	£1.25	£0.00	£0.93	£0.00	£0.87	£2.36	£102.95
Whetstone district centre	£1.31	£10.18	£8.78	£1.01	£0.05	£1.65	£0.45	£0.00	£0.25	£0.02	£0.05	£0.00	£1.34	£0.62	£0.00	£0.12	£25.84
Friern Barnet local centre	£1.05	£4.37	£9.45	£1.45	£2.69	£2.02	£0.25	£0.59	£0.00	£0.00	£0.00	£0.00	£2.52	£0.58	£0.00	£0.15	£25.12
Friern Barnet Retail Park	£2.45	£7.28	£20.65	£4.80	£1.95	£12.70	£2.73	£0.38	£0.91	£0.47	£0.00	£0.00	£10.27	£0.00	£2.03	£0.06	£66.67
Great North Leisure Park	£0.02	£0.04	£1.45	£0.06	£0.62	£3.06	£0.00	£0.00	£0.00	£0.00	£1.65	£0.00	£0.00	£0.00	£0.00	£0.00	£6.89
Homebase New Southgate	£0.02	£0.22	£0.12	£0.02	£0.07	£0.26	£0.69	£0.00	£0.00	£0.00	£0.18	£0.00	£0.55	£0.00	£0.04	£0.00	£2.17
Other Zone 3	£0.00	£0.00	£1.75	£0.00	£0.00	£0.08	£0.10	£0.00	£0.00	£0.00	£0.22	£0.00	£0.00	£0.00	£0.00	£0.00	£2.14
Zone 3 Total	£6.95	£32.01	£88.45	£16.53	£18.11	£27.49	£10.15	£1.39	£1.42	£3.50	£3.35	£0.00	£15.60	£1.21	£2.94	£2.69	£231.79
Zone 4																	
Mill Hill district centre	£0.06	£0.66	£0.00	£2.87	£0.61	£0.51	£0.38	£9.33	£0.37	£0.01	£0.68	£0.00	£0.65	£0.02	£0.00	£0.91	£17.07
Holders Hill Circus local centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Other Zone 4	£0.00	£0.00	£0.00	£0.00	£0.00	£0.02	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.02
Zone 4 Total	£0.06	£0.66	£0.00	£2.87	£0.61	£0.53	£0.38	£9.33	£0.37	£0.01	£0.68	£0.00	£0.65	£0.02	£0.00	£0.91	£17.09
Zone 5																	
Finchley Church End district centre	£0.00	£0.15	£2.18	£1.71	£9.97	£0.43	£0.32	£0.02	£0.29	£0.67	£0.54	£0.00	£0.13	£0.00	£0.47	£0.95	£17.81
Zone 5 Total	£0.00	£0.15	£2.18	£1.71	£9.97	£0.43	£0.32	£0.02	£0.29	£0.67	£0.54	£0.00	£0.13	£0.00	£0.47	£0.95	£17.81
Zone 6																	
East Finchley district centre	£0.53	£0.03	£0.83	£0.49	£2.47	£7.80	£2.21	£0.00	£0.01	£0.44	£0.17	£0.22	£0.00	£0.00	£1.79	£0.66	£17.65
Colney Hatch Lane local centre	£0.00	£0.00	£1.51	£0.56	£0.00	£0.88	£0.02	£0.15	£0.20	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£3.31
Muswell Hill district centre (LB Haringay)	£0.06	£0.66	£5.44	£0.00	£0.00	£29.54	£4.63	£0.02	£0.35	£0.09	£0.00	£0.00	£0.42	£0.00	£0.00	£2.70	£43.92
Zone 6 Total	£0.59	£0.69	£7.77	£1.05	£2.47	£38.22	£6.85	£0.17	£0.56	£0.53	£0.17	£0.22	£0.42	£0.00	£1.79	£3.37	£64.89
Zone 7																	
Other Zone 7	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.05	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.05
Zone 7 Total	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.05	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.05
Zone 8																	
Edgware major centre	£0.02	£0.00	£0.00	£0.77	£0.00	£0.06	£0.00	£29.62	£18.47	£1.15	£2.77	£0.81	£0.00	£18.69	£3.93	£0.04	£76.33
Apex Corner local centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Deansbrook Road local centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.16	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.16
Hale Lane local centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Zone 8 Total	£0.02	£0.00	£0.00	£0.77	£0.00	£0.06	£0.00	£29.79	£18.47	£1.15	£2.77	£0.81	£0.00	£18.69	£3.93	£0.04	£76.49
Zone 9																	
Burnt Oak district centre	£0.00	£0.37	£0.00	£0.21	£0.00	£0.00	£0.00	£0.16	£4.20	£0.26	£0.41	£0.00	£0.00	£0.28	£0.00	£0.00	£5.88
Colindale district centre	£0.00	£0.38	£0.00	£0.60	£0.23	£0.00	£0.00	£2.70	£24.34	£3.09	£5.28	£0.00	£0.00	£3.62	£1.17	£0.00	£41.40
Grahame Park local centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
The Hyde Retail Park	£0.00	£0.00	£0.00	£0.60	£0.14	£0.00	£0.00	£0.62	£3.86	£2.55	£2.86	£0.23	£0.00	£0.39	£0.29	£1.09	£12.62
Queensbury (LB Brent)	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.27	£0.60	£0.00	£0.00	£0.00	£0.00	£1.06	£0.38	£0.00	£2.31
Zone 9 Total	£0.00	£0.75	£0.00	£1.41	£0.37	£0.00	£0.00	£3.74	£32.99	£5.89	£8.55	£0.23	£0.00	£5.35	£1.84	£1.09	£62.21
Zone 10																	
Golders Green district centre	£0.00	£0.06	£0.00	£0.00	£0.05	£0.00	£1.46	£0.17	£0.00	£6.24	£1.03	£0.00	£0.20	£0.00	£2.69	£0.85	£12.74
Temple Fortune district centre	£0.00	£0.00	£2.97	£0.48	£4.75	£0.13	£7.19	£0.00	£0.00	£5.53	£0.00	£0.00	£0.13	£0.00	£0.04	£0.00	£21.22
Brent Street local centre	£0.00	£0.05	£1.87	£0.30	£0.23	£0.02	£0.38	£2.21	£0.33	£0.76	£1.57	£0.00	£0.11	£1.11	£5.51	£2.94	£17.39
Childs Hill local centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.11	£0.12	£0.00	£0.00	£0.00	£2.00	£0.00	£2.23
Golders Green Road local centre	£0.00	£0.00	£0.00	£0.00	£0.77	£0.00	£0.00	£0.00	£0.16	£13.73	£0.48	£0.00	£0.14	£0.00	£0.81	£0.38	£16.48
Zone 10 Total	£0.00	£0.10	£4.84	£0.78	£5.81	£0.15	£9.03	£2.38	£0.49	£26.37	£3.20	£0.00	£0.57	£1.11	£11.05	£4.18	£70.07
Zone 11																	
Brent Cross Shopping Centre	£18.64	£35.62	£48.99	£39.49	£38.82	£46.38	£37.46	£41.82	£53.83	£69.49	£72.37	£9.54	£11.74	£23.53	£68.42	£38.34	£654.50
Hendon Central district centre	£0.00	£0.00	£0.00	£1.58	£0.85	£0.00	£0.31	£0.14	£6.03	£1.08	£5.50	£0.40	£0.02	£0.84	£0.29	£0.57	£17.61
West Hendon local centre	£0.00	£0.00	£0.00	£0.06	£0.00	£0.00	£0.00	£0.00	£0.07	£0.00	£0.26	£0.00	£0.00	£0.15	£0.00	£0.00	£0.53
Broadway Retail Park	£0.00	£0.00	£0.00	£0.40	£0.07	£0.11	£0.03	£0.69	£0.66	£1.23	£2.62	£0.00	£0.03	£0.00	£1.72	£0.34	£7.89
Silkbridge Retail Park	£0.00	£0.00	£0.00	£0.28	£0.00	£0.00	£0.00	£0.00	£0.17	£0.00	£1.60	£0.00	£0.30	£0.00	£0.00	£0.00	£2.36
Staples Corner	£0.08	£0.31	£0.00	£1.35	£0.28	£1.57	£0.19	£2.25	£7.75	£4.42	£18.54	£0.37	£0.00	£3.02	£5.92	£0.70	£46.75
Toys R Us Tilling Rd	£0.00	£0.00	£0.00	£0.48	£0.70	£0.00	£2.64	£0.66	£0.00	£3.04	£1.64	£0.00	£0.72	£0.94	£5.22	£0.00	£16.05
Other Zone 11	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.25	£0.00	£0.25
Zone 11 Total	£18.72	£35.94	£48.99	£43.63	£40.72	£48.06	£40.63	£45.56	£68.52	£79.27	£102.53	£10.31	£12.82	£28.48	£81.83	£39.95	£745.94
Zone 12																	
Borehamwood	£11.17	£1.37	£1.88	£0.41	£0.19	£0.00	£0.47	£5.87	£0.25	£0.00	£0.18	£43.25	£0.00	£0.61	£0.00	£0.00	£65.64
Borehamwood Shopping Park	£4.57	£1.38	£0.00	£0.11	£0.00	£0.00	£0.00	£5.66	£0.00	£0.00	£0.93	£12.72	£0.00	£0.43	£0.00	£0.00	£25.80
Stirling Retail Park	£0.17	£0.17	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.11	£0.93	£0.00	£0.00	£0.00	£0.00	£1.38
Other Zone 12	£0.00	£0.00	£0.00	£0.01	£0.00	£0.00	£0.00	£0.00	£0.04	£0.00	£0.03	£0.17	£0.00	£0.00	£0.00	£0.00	£0.24
Zone 12 Total	£15.92	£2.91	£1.88	£0.53	£0.19	£0.00	£0.47	£11.52	£0.29	£0.00	£1.25	£57.06	£0.00	£1.04	£0.00	£0.00	£93.06
Zone 13																	
Hampden Square local centre	£0.00	£0.00	£0.00	£0.21	£0.00	£0.32	£0.89	£0.00	£0.45	£1.17	£0.18	£0.00	£0.14	£0.00	£0.00	£0.00	£3.35
Southgate centre	£0.35	£1.47	£1.83	£0.00	£0.00	£0.08	£0.06	£0.00	£0.00	£0.00	£0.00	£0.18	£14.04	£0.00	£0.00	£0.00	£18.02
Other Zone 13	£0.00	£0.46	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£1.02	£0.00	£0.00	£0.00	£1.49
Zone 13 Total	£0.35	£1.94	£1.83	£0.21	£0.00	£0.39	£0.95	£0.00	£0.45	£1.17	£0.18	£0.18	£15.20	£0.00	£0.00	£0.00	£22.85
Zone 14																	
Kingsbury district centre (LB Brent)	£0.00	£0.00	£0.00	£0.00	£0.05	£0.00	£0.00	£0.06	£2.68	£0.00	£0.83	£0.00	£0.00	£0.75	£0.00	£0.00	£4.36
Stanmore district centre (LB Harrow)	£0.00	£0.00	£0.00	£0.07	£0.00	£0.00	£0.00	£0.04	£0.00	£0.00	£0.00	£0.00	£0.00	£4.79	£0.00	£0.00	£4.90
B&Q Honeypot Lane	£0.00	£0.00	£0.00	£0.03	£0.00	£0.00	£0.00	£0.66	£0.58	£0.00	£0.04	£0.00	£0.00	£1.41	£0.00	£0.00	£2.72
Zone 14 Total	£0.00	£0.00	£0.00	£0.10	£0.05	£0.00	£0.00	£0.76	£3.26	£0.00	£0.86	£0.00	£0.00	£6.95	£0.00	£0.00	£11.98
Zone 15																	
Cricklewood district centre	£0.00	£0.00	£0.00	£0.51	£0.13	£0.17	£0.05	£0.75	£1.70	£3.99	£5.46	£0.00	£0.00	£0.11	£16.15	£6.77	£35.80
Finchley Road Swiss Cottage district centre (LBC)	£0.00	£0.00	£0.00	£0.11	£0.00	£0.00	£0.00	£0.00	£0.01	£0.42	£0.01	£0.00	£0.00	£0.00	£2.31	£2.02	£4.89
Kilburn district centre (LBC)	£0.00	£0.00	£0.00	£0.06	£0.00	£0.00	£0.00	£0.21	£0.25	£0.24	£3.92	£0.00	£0.00	£0.00	£21.76	£6.67	£33.11
West Hampstead district centre (LB Camden)	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£16.52	£0.22	£16.75
Willesden (LB Brent)	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.25	£0.34	£0.00	£0.00	£0.00	£7.56	£0.00	£8.16
Other Zone 15	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.04	£0.00	£0.04
Zone 15 Total	£0.00	£0.00	£0.00	£0.69	£0.13	£0.17	£0.05	£0.95	£1.96	£4.90	£9.74	£0.00	£0.00	£0.11	£64.36	£15.68	£98.75
Zone 16																	
Belsize Park (LBC)	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.13	£0.00	£0.00	£0.00	£0.00	£0.00	£5.56	£5.69
Hampstead (LBC)	£0.00	£0.00	£0.37	£0.00	£0.80	£0.00	£1.52	£1.29	£0.00	£5.01	£0.00	£0.00	£0.00	£0.71	£5.03	£7.01	£21.73
Highgate (LBC)	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£1.82	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£6.57	£8.40
Kentish Town (LBC)	£0.00	£0.00	£0.56	£0.00	£0.00	£0.00	£0.38	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£17.83	£18.77
Other Zone 16	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£3.03	£3.03
Zone 16 Total	£0.00	£0.00	£0.92	£0.00	£0.80	£0.00	£3.72	£1.29	£0.00	£5.13	£0.00	£0.00	£0.00	£0.71	£5.03	£40.00	£57.61
Study area sub-total	£72.25	£94.33	£159.14	£71.71	£80.35	£115.76	£72.73	£108.55	£130.60	£130.00	£134.27	£68.81	£47.82	£63.67	£173.23	£108.84	£1,632.07
Destinations outside the study area	£32.19	£46.18	£40.99	£27.38	£20.88	£37.51	£17.51	£37.53	£57.56	£28.13	£25.44	£40.95	£93.47	£80.72	£87.56	£152.25	£826.23
Total	£104.44	£140.51	£200.12	£99.09	£101.23	£153.27	£90.25	£146.08	£188.15	£158.12	£159.72	£109.76	£141.29	£144.39	£260.79	£261.09	£2,458.30

Total

Table 5a: Comparison goods need

	Available expenditure	2017	2021	2026	2031	2036
A	Total expenditure (£M)	£1,541	£1,738	£2,137	£2,601	£3,176
B	Market share of LBB (%)	69%	69%	69%	69%	69%
C	Retained expenditure (£M)	£1,064	£1,200	£1,475	£1,796	£2,192
D	Inflow expenditure (£M)	18%	18%	18%	18%	18%
E	Inflow to LBB from the rest of the study area(%)	£275	£310	£381	£464	£566
F	Total available expenditure (£M)	£1,339	£1,509	£1,856	£2,260	£2,758
	Claims on expenditure					
G	Turnover of existing floorspace (£M)	£1,339	£1,443	£1,586	£1,742	£1,914
H	Turnover of commitments (£M)	£0	£255	£280	£308	£339
I	Total claims on expenditure (£M)	£1,339	£1,699	£1,866	£2,050	£2,253
	Quantitative need					
J	Expenditure capacity (£M)	£0	-£189	-£10	£209	£506
K	Assumed sales density (£ per sqm net)	£6,000	£6,469	£7,108	£7,809	£8,579
L	Net quantitative need (sqm)	-	- 29,227	- 1,430	26,809	58,960
M	Gross quantitative need (sqm)	-	- 41,754	- 2,043	38,298	84,228

Table 6a: Comparison goods need - Brent Cross scenario (increased market share)

	Available expenditure	2017	2021	2026	2031	2036
A	Total expenditure (£M)	£1,541	£1,738	£2,137	£2,601	£3,176
B	Market share of LBB (%)	69%	71%	71%	71%	71%
C	Retained expenditure (£M)	£1,064	£1,235	£1,518	£1,848	£2,256
D	Inflow expenditure (£M)	18%	21%	21%	21%	21%
E	Inflow to LBB from the rest of the study area(%)	£275	£358	£441	£536	£655
F	Total available expenditure (£M)	£1,339	£1,593	£1,959	£2,385	£2,911
	Claims on expenditure					
G	Turnover of existing floorspace (£M)	£1,339	£1,443	£1,586	£1,742	£1,914
H	Turnover of commitments (£M)	£0	£255	£280	£308	£339
I	Total claims on expenditure (£M)	£1,339	£1,699	£1,866	£2,050	£2,253
	Quantitative need					
J	Expenditure capacity (£M)	£0	-£106	£92	£334	£658
K	Assumed sales density (£ per sqm net)	£6,000	£6,469	£7,108	£7,809	£8,579
L	Net quantitative need (sqm)	-	- 16,335	12,998	42,797	76,725
M	Gross quantitative need (sqm)	-	- 23,336	18,569	61,139	109,607

Table 3b: Convenience expenditure

Per capita convenience expenditure

	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
2016	£2,083	£2,244	£2,062	£2,188	£2,425	£2,430	£2,687	£2,094	£1,867	£2,439	£1,891	£2,015	£2,361	£1,890	£2,212	£2,647
Exc. SFT	£2,021	£2,177	£2,000	£2,122	£2,352	£2,357	£2,606	£2,031	£1,811	£2,366	£1,834	£1,955	£2,290	£1,833	£2,146	£2,568
2017	£2,014	£2,170	£1,994	£2,116	£2,345	£2,350	£2,599	£2,025	£1,806	£2,359	£1,829	£1,949	£2,283	£1,828	£2,139	£2,560
2021	£1,984	£2,138	£1,964	£2,084	£2,310	£2,315	£2,560	£1,995	£1,779	£2,323	£1,801	£1,920	£2,249	£1,800	£2,107	£2,522
2026	£1,967	£2,119	£1,947	£2,066	£2,289	£2,294	£2,537	£1,977	£1,763	£2,303	£1,785	£1,902	£2,229	£1,784	£2,088	£2,499
2031	£1,968	£2,121	£1,949	£2,068	£2,292	£2,296	£2,539	£1,979	£1,764	£2,305	£1,787	£1,904	£2,231	£1,786	£2,090	£2,501
2036	£1,976	£2,129	£1,956	£2,076	£2,301	£2,306	£2,549	£1,987	£1,771	£2,314	£1,794	£1,912	£2,240	£1,793	£2,099	£2,512

Convenience expenditure £M

	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	LBB total (Z1-11)	Outside LBB	Total
2016	£65.01	£83.75	£131.99	£60.91	£65.30	£102.61	£58.04	£90.32	£133.92	£102.96	£109.24	£76.80	£84.81	£91.46	£183.09	£180.92	£1,004.06	£617.09	£1,621.14
2017	£65.70	£84.63	£133.38	£61.55	£65.98	£103.70	£58.66	£91.27	£135.33	£104.05	£110.40	£77.51	£85.66	£92.14	£184.63	£182.45	£1,014.64	£622.38	£1,637.02
2021	£68.03	£87.63	£138.12	£63.74	£68.33	£107.38	£60.74	£94.51	£140.13	£107.74	£114.31	£80.16	£88.73	£94.58	£189.14	£186.38	£1,050.65	£638.99	£1,689.64
2026	£71.02	£91.49	£144.19	£66.54	£71.33	£112.10	£63.41	£98.67	£146.30	£112.48	£119.34	£83.81	£92.73	£97.89	£194.71	£191.70	£1,096.88	£660.84	£1,757.72
2031	£74.23	£95.62	£150.71	£69.55	£74.55	£117.16	£66.27	£103.13	£152.90	£117.56	£124.73	£87.97	£97.17	£101.58	£200.66	£198.58	£1,146.43	£685.96	£1,832.39
2036	£77.42	£99.73	£157.19	£72.54	£77.76	£122.20	£69.12	£107.56	£159.48	£122.62	£130.10	£92.60	£102.18	£105.88	£208.29	£207.19	£1,195.72	£716.15	£1,911.87
Growth 2017-2036	£11.72	£15.10	£23.80	£10.99	£11.78	£18.51	£10.47	£16.29	£24.15	£18.57	£19.70	£15.10	£16.52	£13.74	£23.67	£24.75	£181.08	£93.77	£274.84

Table 4b: Convenience market shares

	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
Zone 1																
Chipping Barnet district centre	51.8%	14.5%	8.2%	5.4%	1.7%	3.7%	0.6%	0.3%	0.2%	4.2%	0.0%	0.1%	3.3%	0.4%	0.0%	0.0%
Other Zone 1	1.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 1 Total	53.0%	14.5%	8.2%	5.4%	1.7%	3.7%	0.6%	0.3%	0.2%	4.2%	0.0%	0.1%	3.3%	0.4%	0.0%	0.0%
Zone 2																
New Barnet district centre	11.7%	24.4%	2.7%	0.2%	0.0%	0.2%	0.3%	0.4%	1.4%	0.0%	0.0%	0.0%	2.0%	0.0%	0.0%	0.0%
Whetstone district centre	2.7%	17.5%	5.8%	0.7%	0.0%	0.0%	0.0%	0.4%	0.0%	0.8%	0.0%	0.3%	1.7%	0.9%	0.0%	0.4%
East Barnet Village local centre	0.1%	2.5%	1.2%	0.0%	0.0%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	0.0%	0.0%	0.0%
Great North Road local centre	0.8%	1.7%	1.1%	0.0%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	0.2%	0.0%	0.0%
Other Zone 2	2.1%	6.9%	7.5%	0.7%	2.9%	0.2%	1.3%	1.2%	0.0%	0.2%	0.0%	0.0%	2.3%	0.2%	3.3%	0.0%
Zone 2 Total	17.4%	53.1%	18.4%	1.7%	3.4%	0.7%	1.6%	1.9%	1.4%	0.9%	0.0%	0.3%	6.6%	1.2%	3.3%	0.4%
Zone 3																
Whetstone district centre	0.1%	0.5%	0.2%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	1.1%	0.0%	0.0%
Friern Barnet local centre	0.6%	0.0%	0.6%	0.0%	0.0%	0.3%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%	0.0%	0.0%
North Finchley district centre	0.7%	3.9%	26.6%	7.7%	7.9%	7.7%	1.2%	0.1%	0.1%	2.5%	0.4%	0.0%	0.0%	0.8%	0.7%	0.0%
Tesco Extra Coppetts Centre North Circular	0.0%	2.1%	12.5%	5.5%	16.5%	14.2%	14.4%	0.0%	0.0%	12.7%	0.9%	0.0%	1.2%	0.0%	0.2%	0.0%
Waitrose Ballards Lane	1.5%	1.4%	13.4%	4.4%	14.4%	8.2%	8.3%	0.5%	0.2%	1.8%	0.3%	0.0%	0.1%	0.0%	1.5%	2.8%
Other Zone 3	0.0%	0.1%	2.4%	0.0%	0.6%	2.4%	0.7%	0.0%	0.0%	0.3%	0.0%	0.0%	0.0%	0.0%	0.7%	1.2%
Other Zone 3 (LBE)	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%	0.0%	0.0%	0.0%
Zone 3 Total	3.0%	7.9%	56.4%	17.8%	39.4%	32.9%	25.7%	0.7%	0.3%	17.3%	1.6%	0.0%	1.6%	1.8%	3.2%	4.1%
Zone 4																
Mill Hill district centre	0.0%	0.0%	0.0%	1.8%	0.0%	0.0%	0.0%	2.0%	0.4%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Holders Hill Circus local centre	0.0%	0.0%	0.3%	2.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Waitrose Mill Hill East	0.2%	0.0%	0.0%	20.3%	2.6%	0.0%	3.5%	5.0%	3.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%
Other Zone 4	0.0%	0.0%	0.0%	0.1%	0.4%	0.0%	0.3%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.3%
Zone 4 Total	0.2%	0.0%	0.3%	24.1%	3.0%	0.0%	3.8%	7.0%	4.0%	0.2%	0.1%	0.0%	0.0%	0.0%	0.0%	0.4%
Zone 5																
Finchley Church End district centre	0.0%	1.4%	4.1%	19.8%	39.1%	0.3%	3.7%	0.1%	0.5%	0.0%	0.0%	0.0%	0.5%	0.0%	0.4%	0.2%
Zone 5 Total	0.0%	1.4%	4.1%	19.8%	39.1%	0.3%	3.7%	0.1%	0.5%	0.0%	0.0%	0.0%	0.5%	0.0%	0.4%	0.2%
Zone 6																
East Finchley district centre	0.0%	1.0%	0.7%	0.0%	0.4%	10.9%	4.2%	0.0%	0.6%	1.2%	0.0%	0.0%	0.0%	0.0%	2.0%	0.5%
Muswell Hill district centre	0.0%	0.0%	2.8%	0.8%	0.0%	42.8%	13.4%	1.1%	0.3%	0.2%	0.0%	0.0%	0.5%	0.0%	0.0%	2.1%
Colney Hatch Lane local centre	0.0%	0.0%	0.0%	0.0%	0.0%	1.2%	0.4%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 6 Total	0.0%	1.0%	3.5%	0.8%	0.4%	54.8%	18.1%	1.4%	0.9%	1.4%	0.0%	0.0%	0.5%	0.0%	2.0%	2.7%
Zone 7																
Temple Fortune district centre	0.0%	0.0%	0.3%	0.0%	3.6%	0.2%	3.9%	0.0%	0.0%	2.9%	0.0%	0.0%	0.0%	0.0%	0.3%	0.0%
Zone 7 Total	0.0%	0.0%	0.3%	0.0%	3.6%	0.2%	3.9%	0.0%	0.0%	2.9%	0.0%	0.0%	0.0%	0.0%	0.3%	0.0%
Zone 8																
Edgware major centre	0.0%	0.0%	0.0%	2.0%	0.0%	0.0%	0.0%	41.0%	13.3%	0.1%	1.7%	0.4%	0.0%	12.6%	0.0%	0.4%
Mill Hill district centre	0.0%	0.0%	0.0%	2.1%	0.4%	1.0%	0.2%	9.9%	0.2%	0.0%	0.0%	0.0%	0.4%	0.5%	0.0%	0.0%
Apex Corner local centre	0.0%	0.0%	0.0%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Deansbrook Road local centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Hale Lane local centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Asda Wembley (LB Brent)	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.3%	0.0%	8.4%	0.0%	0.0%	4.4%	19.1%	0.0%
Other Zone 8	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	0.0%	0.0%
Zone 8 Total	0.0%	0.0%	0.0%	5.2%	0.4%	1.0%	0.2%	52.2%	13.9%	0.1%	10.1%	0.4%	0.4%	18.0%	19.1%	0.4%
Zone 9																
Burnt Oak district centre	0.0%	0.0%	0.3%	0.2%	0.0%	0.0%	0.0%	3.6%	8.0%	0.1%	0.3%	0.0%	0.0%	3.5%	0.0%	0.0%
Colindale district centre	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	3.2%	0.5%	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%
Grahame Park local centre	0.0%	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%
Morrisons Edgware Road Colindale	0.0%	0.0%	0.0%	3.8%	0.0%	0.0%	0.0%	1.9%	3.2%	0.7%	4.0%	0.2%	0.0%	0.6%	0.0%	0.4%
Sainsbury's Hyde Estate Road Hendon	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%	0.0%	0.6%	11.2%	0.5%	15.7%	0.0%	0.0%	4.4%	1.8%	0.0%
Queensbury (LBH)	0.0%	0.0%	0.0%	0.3%	0.0%	0.0%	0.0%	5.7%	10.1%	0.3%	0.2%	0.4%	0.0%	27.5%	0.0%	0.0%
Asda Colindale (LB Brent)	0.0%	1.6%	0.0%	2.1%	0.0%	0.0%	0.5%	5.5%	30.2%	1.2%	9.0%	0.0%	0.0%	9.3%	2.6%	0.4%
Other Zone 9	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	0.0%	0.0%
Zone 9 Total	0.0%	1.6%	0.3%	7.3%	0.0%	0.0%	0.5%	17.3%	66.6%	3.3%	30.5%	0.7%	0.0%	45.6%	4.4%	0.8%
Zone 10																
Brent Street district centre	0.0%	0.0%	0.0%	2.5%	0.0%	0.0%	0.0%	0.0%	1.4%	0.1%	1.3%	0.0%	0.0%	0.0%	1.2%	0.0%
Golders Green district centre	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%	6.0%	0.0%	0.2%	11.9%	0.8%	0.0%	2.6%	0.0%	4.4%	0.8%
Hendon Central district centre	0.0%	0.0%	0.0%	1.9%	0.0%	0.0%	0.0%	0.0%	0.3%	1.6%	5.9%	0.0%	0.0%	0.0%	0.0%	0.4%
Temple Fortune district centre	0.0%	0.1%	0.0%	0.3%	2.6%	0.0%	20.8%	0.0%	0.0%	7.7%	0.0%	0.0%	0.1%	0.0%	0.0%	0.4%
Childs Hill local centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	0.1%	0.0%	0.0%	0.0%	5.3%	4.9%
Golders Green Road local centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	11.1%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 10 Total	0.0%	0.1%	0.0%	4.6%	2.8%	0.0%	26.8%	0.0%	1.8%	33.3%	8.3%	0.0%	2.6%	0.0%	10.9%	6.5%
Zone 11																
Brent Cross	0.0%	3.4%	0.4%	2.1%	0.0%	1.4%	1.7%	1.6%	1.5%	1.3%	10.2%	0.5%	0.9%	0.0%	4.0%	4.2%
Hendon Central district centre	0.0%	0.2%	0.0%	0.3%	0.0%	0.0%	0.0%	0.4%	0.3%	0.0%	1.0%	0.0%	0.0%	0.0%	0.6%	0.0%
Lidl Edgware Road Cricklewood	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.6%	5.7%	0.0%	0.0%	0.0%	1.8%	0.0%
Tesco Tiling Road Cricklewood	0.0%	0.3%	0.0%	5.6%	0.2%	0.0%	3.3%	0.0%	3.8%	25.9%	10.2%	0.0%	0.0%	0.0%	3.4%	0.0%
West Hendon local centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other Zone 11	0.0%	0.0%	0.0%	0.2%	0.1%	0.0%	0.0%	0.0%	0.0%	0.5%	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 11 Total	0.0%	3.9%	0.4%	8.2%	0.4%	1.4%	5.0%	2.0%	5.7%	29.2%	27.8%	0.5%	0.9%	0.0%	9.8%	4.2%
Zone 12																
Borehamwood	12.4%	3.7%	0.4%	1.8%	0.0%	0.1%	0.0%	12.6%	0.0%	1.7%	2.0%	92.1%	0.3%	1.0%	2.0%	0.0%
Other Zone 12	0.0%	0.0%	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%
Zone 12 Total	12.4%	3.7%	0.4%	1.8%	0.0%	0.1%	0.0%	12.6%	0.0%	1.7%	2.0%	92.4%	0.3%	1.0%	2.0%	0.0%
Zone 13																
Hampden Square local centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.2%	0.0%	0.3%	0.0%	0.2%	0.0%	0.2%	0.0%	0.0%	0.0%
Cockfosters (LBE)	0.0%	2.8%	0.0%	1.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	1.7%	0.2%	0.0%	0.0%
Southgate (LBE)	0.9%	5.4%	3.5%	0.3%	0.0%	0.0%	0.3%	0.0%	0.1%	0.0%	0.0%	0.5%	32.0%	0.0%	0.0%	0.0%
Winchmore Hill (LBE)	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.4%	0.0%	0.0%	0.0%
Zone 13 Total	0.9%	8.2%	3.5%	1.8%	0.0%	0.4%	2.4%	0.0%	0.4%	0.0%	0.4%	0.5%	36.3%	0.2%	0.0%	0.0%
Zone 14																
Kingsbury (LB Brent)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	3.0%	0.0%	4.4%	0.0%	0.0%	4.4%	0.0%	0.0%
Stanmore (LBH)	0.0%	0.0%	0.0%	0.0%	3.3%	0.5%	0.0%	0.3%	0.1%	0.0%	0.8%	0.1%	0.0%	10.3%	0.0%	0.0%
Zone 14 Total	0.0%	0.0%	0.0%	0.0%	3.3%	0.5%	0.0%	0.4%	3.1%	0.0%	5.3%	0.1%	0.0%	14.7%	0.0%	0.0%
Zone 15																
Cricklewood district centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	5.2%	0.0%	0.0%	0.0%	3.7%	0.0%
Neasden (LB Brent)	0.0%	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%	0.9%	0.0%
Swiss Cottage (LBC)	0.0%	0.0%	0.0%	0.0%	1.8%	0.0%	0.6%	0.0%	0.0%	0.9%	0.8%	1.2%	0.0%	0.0%	2.5%	6.1%
West Hampstead (LBC)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.4%	0.0%
Willesden Green (LB Brent)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%	0.0%	0.0%	0.0%	12.4%	0.0%
Other Zone 15	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	0.0%
Zone 15 Total	0.0%	0.0%	0.0%	0.0%	1.8%	0.0%	0.6%	0.0%	0.0%	1.5%	8.5%	1.2%	0.0%	0.0%	25.3%	6.1%
Zone 16																
Belsize Park (LBC)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	4.7%
Hampstead (LBC)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	0.0%	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%	0.4%	1.3%
Highgate (LBC)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.9%
Kentish Town (LBC)	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%	0.0%	8.7%
Other Zone 16	0.0%	0.0%	0.0%	0.2%	0.0%	0.1%	0.0%	0.0%	0.0%	0.2%	0.1%	0.0%	0.0%	0.0%	1.3%	8.4%
Zone 16 Total	0.0%	0.0%	0.0%	0.2%	0.0%	0.1%	2.2%	0.0%	0.0%	0.6%	0.1%	0.0%	0.0%	0.0%	1.9%	25.1%
Outside study area																
Outside study area Total	13.1%	4.6%	4.3%	1.3%	0.6%	4.0%	4.8%	4.0%	1.4%	3.4%	5.3%	3.9%	46.9%	17.0%	17.3%	49.3%
Grand 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%

Table 4b: Convenience turnover 2017 (£M)

	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	Total
Zone 1																	
Chipping Barnet district centre	£34.03	£12.26	£10.99	£3.34	£1.15	£3.86	£0.34	£0.28	£0.22	£4.38	£0.00	£0.05	£2.83	£0.35	£0.00	£0.00	£74.09
Other Zone 1	£0.80	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.80
Zone 1 Total	£34.84	£12.26	£10.99	£3.34	£1.15	£3.86	£0.34	£0.28	£0.22	£4.38	£0.00	£0.05	£2.83	£0.35	£0.00	£0.00	£74.89
Zone 2																	
New Barnet district centre	£7.69	£20.69	£3.58	£0.15	£0.00	£0.24	£0.17	£0.32	£1.94	£0.00	£0.00	£0.00	£1.70	£0.00	£0.00	£0.00	£36.49
Whetstone district centre	£1.79	£14.78	£7.78	£0.44	£0.00	£0.00	£0.00	£0.32	£0.00	£0.78	£0.00	£0.21	£1.48	£0.81	£0.00	£0.74	£29.13
East Barnet Village local centre	£0.03	£2.12	£1.65	£0.00	£0.00	£0.28	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.22	£0.00	£0.00	£0.00	£4.31
Great North Road local centre	£0.52	£1.44	£1.50	£0.00	£0.33	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.35	£0.16	£0.00	£0.00	£4.29
Other Zone 2	£1.38	£5.88	£10.05	£0.44	£1.89	£0.22	£0.77	£1.08	£0.00	£0.20	£0.00	£0.00	£1.94	£0.14	£6.09	£0.00	£30.08
Zone 2 Total	£11.42	£44.91	£24.56	£1.03	£2.22	£0.74	£0.94	£1.73	£1.94	£0.99	£0.00	£0.21	£5.69	£1.11	£6.09	£0.74	£104.30
Zone 3																	
Whetstone district centre	£0.08	£0.40	£0.22	£0.11	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.15	£0.98	£0.00	£0.00	£1.93
Friern Barnet local centre	£0.38	£0.00	£0.81	£0.00	£0.00	£0.36	£0.65	£0.00	£0.00	£0.00	£0.00	£0.00	£0.15	£0.00	£0.00	£0.00	£2.35
North Finchley district centre	£0.49	£3.26	£35.48	£4.76	£5.24	£8.03	£0.70	£0.09	£0.20	£2.65	£0.41	£0.00	£0.00	£0.69	£1.22	£0.00	£63.22
Tesco Extra Coppetts Centre North Circular	£0.00	£1.79	£16.72	£3.39	£10.87	£14.77	£8.47	£0.00	£0.00	£13.21	£1.03	£0.00	£1.03	£0.00	£0.46	£0.00	£71.74
Waitrose Ballards Lane	£1.00	£1.20	£17.93	£2.70	£9.52	£8.51	£4.88	£0.50	£0.21	£1.82	£0.37	£0.00	£0.08	£0.00	£2.85	£5.19	£56.75
Other Zone 3	£0.00	£0.05	£3.20	£0.00	£0.40	£2.49	£0.39	£0.00	£0.00	£0.31	£0.00	£0.00	£0.00	£0.00	£1.37	£2.24	£10.45
Other Zone 3 (LBE)	£0.00	£0.00	£0.80	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.80
Zone 3 Total	£1.95	£6.70	£75.17	£10.96	£26.03	£34.17	£15.09	£0.59	£0.40	£17.99	£1.80	£0.00	£1.40	£1.67	£5.90	£7.42	£207.24
Zone 4																	
Mill Hill district centre	£0.00	£0.00	£0.00	£1.08	£0.00	£0.00	£0.00	£1.79	£0.59	£0.25	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£3.71
Holders Hill Circus local centre	£0.00	£0.00	£0.42	£1.20	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£1.62
Waitrose Mill Hill East	£0.14	£0.00	£0.00	£12.48	£1.72	£0.00	£2.04	£4.60	£4.87	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.22	£26.07
Other Zone 4	£0.00	£0.00	£0.00	£0.07	£0.25	£0.00	£0.18	£0.00	£0.00	£0.00	£0.10	£0.00	£0.00	£0.00	£0.00	£0.46	£1.06
Zone 4 Total	£0.14	£0.00	£0.42	£14.84	£1.97	£0.00	£2.21	£6.40	£5.45	£0.25	£0.10	£0.00	£0.00	£0.00	£0.00	£0.68	£32.46
Zone 5																	
Finchley Church End district centre	£0.00	£1.17	£5.40	£12.21	£25.79	£0.35	£2.18	£0.13	£0.64	£0.00	£0.00	£0.00	£0.39	£0.00	£0.72	£0.36	£49.36
Zone 5 Total	£0.00	£1.17	£5.40	£12.21	£25.79	£0.35	£2.18	£0.13	£0.64	£0.00	£0.00	£0.00	£0.39	£0.00	£0.72	£0.36	£49.36
Zone 6																	
East Finchley district centre	£0.00	£0.81	£0.92	£0.00	£0.24	£11.28	£2.49	£0.00	£0.75	£1.21	£0.00	£0.00	£0.00	£0.00	£3.63	£0.97	£22.31
Muswell Hill district centre	£0.00	£0.00	£3.73	£0.48	£0.00	£44.33	£7.89	£0.97	£0.45	£0.21	£0.00	£0.00	£0.44	£0.00	£0.00	£3.87	£62.37
Colney Hatch Lane local centre	£0.00	£0.00	£0.00	£0.00	£0.00	£1.23	£0.25	£0.31	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£1.79
Zone 6 Total	£0.00	£0.81	£4.64	£0.48	£0.24	£56.85	£10.63	£1.29	£1.20	£1.42	£0.00	£0.00	£0.44	£0.00	£3.63	£4.85	£86.47
Zone 7																	
Temple Fortune district centre	£0.00	£0.00	£0.36	£0.00	£2.37	£0.18	£2.26	£0.00	£0.00	£3.05	£0.00	£0.00	£0.00	£0.00	£0.62	£0.00	£8.86
Zone 7 Total	£0.00	£0.00	£0.36	£0.00	£2.37	£0.18	£2.26	£0.00	£0.00	£3.05	£0.00	£0.00	£0.00	£0.00	£0.62	£0.00	£8.86
Zone 8																	
Edgware major centre	£0.00	£0.00	£0.00	£1.25	£0.00	£0.00	£0.00	£37.39	£17.99	£0.05	£1.84	£0.35	£0.00	£11.60	£0.00	£0.75	£71.22
Mill Hill district centre	£0.00	£0.00	£0.00	£1.28	£0.26	£0.99	£0.13	£9.07	£0.32	£0.00	£0.00	£0.00	£0.32	£0.45	£0.00	£0.00	£12.82
Apex Corner local centre	£0.00	£0.00	£0.00	£0.66	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.66
Deansbrook Road local centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Hale Lane local centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Asda Wembley (LB Brent)	£0.00	£0.00	£0.00	£0.00	£0.04	£0.00	£0.00	£0.00	£0.45	£0.00	£9.32	£0.00	£0.00	£4.09	£35.31	£0.00	£49.20
Other Zone 8	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£1.21	£0.00	£0.00	£0.00	£0.00	£0.00	£0.47	£0.00	£0.00	£1.68
Zone 8 Total	£0.00	£0.00	£0.00	£3.20	£0.29	£0.99	£0.13	£47.67	£18.76	£0.05	£11.16	£0.35	£0.32	£16.61	£35.31	£0.75	£135.58
Zone 9																	
Burnt Oak district centre	£0.00	£0.00	£0.41	£0.11	£0.00	£0.00	£0.00	£3.29	£10.89	£0.12	£0.33	£0.00	£0.04	£3.25	£0.00	£0.00	£18.44
Colindale district centre	£0.00	£0.00	£0.00	£0.08	£0.00	£0.00	£0.00	£0.00	£4.35	£0.50	£1.41	£0.00	£0.00	£0.00	£0.00	£0.00	£6.34
Grahame Park local centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.89	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.89
Morrisons Edgware Road Colindale	£0.00	£0.00	£0.00	£2.36	£0.00	£0.00	£0.00	£1.70	£4.33	£0.71	£4.40	£0.16	£0.00	£0.60	£0.00	£0.74	£14.98
Sainsbury's Hyde Estate Road Hendon	£0.00	£0.00	£0.00	£0.48	£0.00	£0.00	£0.00	£0.57	£15.11	£0.52	£17.31	£0.00	£0.00	£4.02	£3.32	£0.00	£41.33
Queensbury (LBH)	£0.00	£0.00	£0.00	£0.16	£0.00	£0.00	£0.00	£5.20	£13.63	£0.26	£0.26	£0.35	£0.00	£25.33	£0.00	£0.00	£45.18
Asda Colindale (LB Brent)	£0.00	£1.33	£0.00	£1.29	£0.00	£0.00	£0.27	£5.01	£40.91	£1.29	£9.97	£0.00	£0.00	£8.57	£4.82	£0.75	£74.21
Other Zone 9	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.25	£0.00	£0.00	£0.25
Zone 9 Total	£0.00	£1.33	£0.41	£4.47	£0.00	£0.00	£0.27	£15.77	£90.10	£3.41	£33.68	£0.51	£0.04	£42.02	£8.14	£1.49	£201.63
Zone 10																	
Brent Street district centre	£0.00	£0.00	£0.00	£1.53	£0.00	£0.00	£0.00	£0.00	£1.83	£0.08	£1.44	£0.00	£0.00	£0.00	£2.14	£0.00	£7.02
Golders Green district centre	£0.00	£0.00	£0.00	£0.03	£0.13	£0.00	£3.52	£0.00	£0.22	£12.38	£0.85	£0.00	£2.19	£0.00	£8.18	£1.42	£28.91
Hendon Central district centre	£0.00	£0.00	£0.00	£1.14	£0.00	£0.00	£0.00	£0.00	£0.40	£1.64	£6.48	£0.00	£0.00	£0.00	£0.00	£0.74	£10.40
Temple Fortune district centre	£0.00	£0.12	£0.00	£0.15	£1.75	£0.00	£12.21	£0.00	£0.00	£8.03	£0.00	£0.00	£0.07	£0.00	£0.00	£0.74	£23.07
Childs Hill local centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£1.03	£0.12	£0.00	£0.00	£0.00	£9.78	£8.93	£19.85
Golders Green Road local centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£11.50	£0.26	£0.00	£0.00	£0.00	£0.08	£0.00	£11.84
Zone 10 Total	£0.00	£0.12	£0.00	£2.85	£1.88	£0.00	£15.72	£0.00	£2.45	£34.66	£9.15	£0.00	£2.26	£0.00	£20.18	£11.83	£101.11
Zone 11																	
Brent Cross	£0.00	£2.92	£0.47	£1.29	£0.00	£1.40	£1.01	£1.48	£2.09	£1.31	£11.27	£0.36	£0.79	£0.00	£7.48	£7.58	£39.43
Hendon Central district centre	£0.00	£0.18	£0.00	£0.20	£0.00	£0.00	£0.00	£0.34	£0.44	£0.00	£1.05	£0.00	£0.00	£0.00	£1.12	£0.00	£3.33
Lidl Edgware Road Cricklewood	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£1.64	£6.30	£0.00	£0.00	£0.00	£3.28	£0.00	£11.22
Tesco Tiling Road Cricklewood	£0.00	£0.22	£0.00	£3.44	£0.16	£0.00	£1.94	£0.00	£5.13	£26.93	£11.23	£0.00	£0.00	£0.00	£6.19	£0.00	£55.25
West Hendon local centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Other Zone 11	£0.00	£0.00	£0.00	£0.10	£0.08	£0.00	£0.00	£0.00	£0.00	£0.51	£0.87	£0.00	£0.00	£0.00	£0.09	£0.00	£1.65
Zone 11 Total	£0.00	£3.32	£0.47	£5.03	£0.24	£1.40	£2.94	£1.82	£7.65	£30.39	£30.73	£0.36	£0.79	£0.00	£18.15	£7.58	£110.88
Zone 12																	
Borehamwood	£8.14	£3.16	£0.58	£1.14	£0.00	£0.08	£0.00	£11.55	£0.00	£1.72	£2.19	£71.39	£0.23	£0.93	£3.68	£0.00	£104.77
Other Zone 12	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.24	£0.00	£0.00	£0.00	£0.00	£0.24
Zone 12 Total	£8.14	£3.16	£0.58	£1.14	£0.00	£0.08	£0.00	£11.55	£0.00	£1.72	£2.19	£71.62	£0.23	£0.93	£3.68	£0.00	£105.01
Zone 13																	
Hampden Square local centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£1.26	£0.00	£0.40	£0.00	£0.26	£0.00	£0.15	£0.00	£0.00	£0.00	£2.07
Cockfosters (LBE)	£0.00	£2.34	£0.00	£0.95	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.16	£0.00	£1.48	£0.20	£0.00	£0.00	£5.13
Southgate (LBE)	£0.60	£4.58	£4.69	£0.16	£0.00	£0.00	£0.17	£0.00	£0.09	£0.00	£0.00	£0.40	£27.40	£0.00	£0.00	£0.00	£38.08
Winchmore Hill (LBE)	£0.00	£0.00	£0.00	£0.00	£0.00	£0.44	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£2.03	£0.00	£0.00	£0.00	£2.47
Zone 13 Total	£0.60	£6.92	£4.69	£1.11	£0.00	£0.44	£1.43	£0.00	£0.49	£0.00	£0.42	£0.40	£31.07	£0.20	£0.00	£0.00	£47.76
Zone 14																	
Kingsbury (LB Brent)	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.07	£4.02	£0.00	£4.87	£0.00	£0.00	£4.04	£0.00	£0.00	£13.01
Stanmore (LBH)	£0.00	£0.00	£0.00	£0.00	£2.21	£0.47	£0.00	£0.31	£0.16	£0.00	£0.93	£0.04	£0.00	£9.53	£0.00	£0.00	£13.66
Zone 14 Total	£0.00	£0.00	£0.00	£0.00	£2.21	£0.47	£0.00	£0.39	£4.19	£0.00	£5.81	£0.04	£0.00	£13.57	£0.00	£0.00	£26.67
Zone 15																	
Cricklewood district centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.62	£5.77	£0.00	£0.00	£0.00	£6.87	£0.00	£13.26
Neasden (LB Brent)	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£1.03	£0.00	£0.00	£0.00	£1.70	£0.00	£2.73
Swiss Cottage (LBC)	£0.00	£0.00	£0.00	£0.00	£1.19	£0.00	£0.35	£0.00	£0.00	£0.92	£0.91	£0.95	£0.00	£0.00	£4.55	£11.09	£19.95
West Hampstead (LBC)	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£9.89	£0.00	£9.89
Willesden Green (LB Brent)	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£1.69	£0.00	£0.00	£0.00	£22.89	£0.00	£24.58
Other Zone 15	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.81	£0.00	£0.81
Zone 15 Total	£0.00	£0.00	£0.00	£0.00	£1.19	£0.00	£0.35	£0.00	£0.00	£1.54	£9.40	£0.95	£0.00	£0.00	£46.71	£11.09	£71.22
Zone 16																	
Belsize Park (LBC)	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.04	£0.00	£0.00	£0.00	£0.00	£0.26	£8.58	£8.88
Hampstead (LBC)	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.21	£0.00	£0.00	£0.38	£0.00	£0.00	£0.00	£0.00	£0.78	£2.45	£3.82
Highgate (LBC)	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.83	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£3.54	£4.37
Kentish Town (LBC)	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.28	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£15.94	£16.22
Other Zone 16	£0.00	£0.00	£0.00	£0.12	£0.00	£0.08	£0.00	£0.00	£0.00	£0.22	£0.13	£0.00	£0.00	£0.00	£2.44	£15.26	£18.25
Zone 16 Total	£0.00	£0.00	£0.00	£0.12	£0.00	£0.08	£1.32	£0.00	£0.00	£0.65	£0.13	£0.00	£0.00	£0.00	£3.48	£45.76	£51.53
Outside study area																	
Outside study area Total	£8.61	£3.93	£5.68	£0.78	£0.41	£4.10	£2.84	£3.67	£1.85	£3.55	£5.82	£3.02	£40.21	£15.68	£32.00	£89.90	£222.05
Grand Total	£65.70	£84.63	£133.38	£61.55	£65.98	£103.70	£58.66	£91.27	£135.33	£104.05	£110.40	£77.51	£85.66	£92.14	£184.63	£182.45	£1,637.02

Table 5b: Convenience goods need

	Available expenditure	2017	2021	2026	2031	2036
A	Total expenditure (£M)	£1,015	£1,051	£1,097	£1,146	£1,196
B	Market share of LBB (%)	74%	74%	74%	74%	74%
C	Retained expenditure (£M)	£748	£774	£808	£845	£881
D	Inflow expenditure (£M)	13%	13%	13%	13%	13%
E	Inflow to LBB from the rest of the study area	£134	£139	£145	£151	£158
F	Total available expenditure (£M)	£881	£913	£953	£996	£1,039
	Claims on expenditure					
G	Turnover of existing floorspace (£M)	£881	£881	£881	£881	£881
H	Turnover of commitments (£M)	£0	£175	£175	£175	£175
I	Total claims on expenditure (£M)	£881	£1,057	£1,057	£1,057	£1,057
	Quantitative need					
J	Expenditure capacity (£M)	£0	-£144	-£104	-£61	-£18
K	Assumed sales density (£ per sqm net)	£12,000	£12,000	£12,000	£12,000	£12,000
L	Net quantitative need (sqm)	-	- 12,010	- 8,663	- 5,076	- 1,508
M	Gross quantitative need (sqm)	-	- 17,157	- 12,375	- 7,252	- 2,155

APPENDIX I QUANTITATIVE CAPACITY METHOD

The method for forecasting convenience (food) and comparison (non-food) retail needs follows a widely-adopted step-by-step methodology. The key steps of this comply with the PPG and are set out below, and should be read alongside the analysis in the main study report.

The technical inputs into each stage of the method which have been used for the purposes of this study are explained in the proceeding appendix.

Step	Summary of method
1	Estimate the population growth over the course of the study period for each of the study area zones, using population projections agreed with the Council at the inception of the study. Define appropriate 'forecast years' at which to assess quantitative need.
2	Establish the base year per capita (per head) spending on convenience (food) and comparison (non-food) goods, using published data sources. Apply appropriate growth rates to establish the expenditure per head in the forecast years.
3	Calculate the 'pot' of expenditure within the study area at each of the forecast years by combining the population figures (calculated at Step 1) with the expenditure figures (calculated at Step 2), and making an allowance for Special Forms of Trading (SFT) such as internet / mobile shopping, catalogue shopping, and so on. SFT is increased in the forecast years to reflect the latest economic forecasts.
4	Calculate the study area spending by applying the market share data from the household telephone survey to the overall 'pot' of expenditure (calculated at Step 3)
5	Allow for any 'inflow' of expenditure from beyond the study area, if appropriate.
6	Calculate the sales densities of existing retail floorspace, to assess turnover performance in the base year, and if appropriate make allowance for over or under-trading of this floorspace (i.e. the difference between the household survey-derived turnovers and the 'benchmark' turnovers)
7	Project the spending forecasts forward to the forecast years.
8	Make allowances for sales density growth (i.e. money ring-fenced to allow for the growth in productivity / turnover of existing retailers), and/or any commitments to new retail floorspace (i.e. extant planning permissions, or schemes under construction)
9	Draw together steps 1 to 8 to assess whether there is any excess expenditure growth in the forecast years which can be translated into a quantitative need for new retail floorspace, by applying a typical sales density for new floorspace figure to the excess expenditure figure.
10	Assess alternative policy scenarios, and / or the sensitivity testing of key assumptions.

APPENDIX J LEISURE CAPACITY TABLES

Table L1: Leisure expenditure per capita

	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
Restaurants, cafes																
2017	£1,055	£1,201	£1,118	£1,245	£1,511	£1,452	£1,555	£1,093	£894	£1,421	£945	£876	£1,314	£940	£1,428	£1,546
2021	£1,099	£1,251	£1,165	£1,297	£1,573	£1,513	£1,619	£1,138	£931	£1,481	£985	£912	£1,369	£979	£1,487	£1,611
2026	£1,179	£1,343	£1,250	£1,392	£1,688	£1,623	£1,738	£1,221	£999	£1,589	£1,056	£979	£1,469	£1,051	£1,596	£1,728
2031	£1,270	£1,446	£1,346	£1,499	£1,819	£1,748	£1,872	£1,316	£1,076	£1,711	£1,138	£1,054	£1,582	£1,132	£1,719	£1,862
2036	£1,368	£1,558	£1,451	£1,615	£1,959	£1,884	£2,016	£1,417	£1,160	£1,844	£1,226	£1,136	£1,704	£1,219	£1,852	£2,006
Pubs / bars / nightclubs / music venues																
2017	£341	£389	£328	£383	£472	£468	£512	£310	£199	£465	£217	£212	£413	£236	£464	£538
2021	£355	£405	£341	£399	£492	£487	£533	£323	£207	£484	£226	£221	£430	£245	£483	£560
2026	£381	£435	£366	£428	£528	£523	£572	£347	£222	£520	£243	£237	£461	£263	£519	£601
2031	£411	£469	£395	£461	£568	£564	£617	£374	£239	£560	£261	£255	£497	£284	£559	£647
2036	£442	£505	£425	£497	£612	£607	£664	£402	£258	£603	£282	£275	£535	£306	£602	£697
Cinemas and theatres																
2017	£65	£78	£69	£87	£114	£113	£129	£66	£38	£118	£47	£51	£87	£47	£91	£122
2021	£67	£81	£71	£91	£118	£117	£134	£68	£39	£123	£49	£53	£91	£49	£95	£127
2026	£72	£87	£77	£97	£127	£126	£144	£73	£42	£132	£53	£57	£97	£53	£102	£136
2031	£78	£94	£83	£105	£137	£136	£155	£79	£46	£142	£57	£62	£105	£57	£110	£147
2036	£84	£101	£89	£113	£147	£146	£167	£85	£49	£153	£61	£66	£113	£61	£118	£158
Games of chance																
2017	£123	£127	£109	£120	£123	£116	£127	£116	£96	£113	£99	£148	£130	£103	£93	£110
2021	£128	£132	£113	£125	£128	£121	£132	£121	£100	£117	£103	£155	£135	£108	£97	£114
2026	£137	£142	£121	£134	£137	£129	£142	£129	£108	£126	£111	£166	£145	£116	£104	£122
2031	£148	£153	£131	£144	£148	£139	£153	£139	£116	£136	£120	£179	£157	£125	£112	£132
2036	£159	£165	£141	£155	£159	£150	£165	£150	£125	£146	£129	£193	£169	£134	£121	£142
Recreational and sporting services																
2015	£207	£242	£210	£258	£309	£303	£350	£211	£139	£315	£167	£107	£265	£183	£236	£319
2017	£212	£248	£215	£264	£316	£310	£358	£216	£142	£323	£171	£110	£271	£187	£242	£327
2021	£221	£258	£224	£275	£330	£323	£373	£225	£148	£336	£178	£114	£283	£195	£252	£340
2026	£237	£277	£240	£295	£354	£347	£401	£242	£159	£361	£191	£122	£303	£209	£270	£365
2031	£255	£298	£259	£318	£381	£374	£432	£260	£171	£388	£206	£132	£327	£226	£291	£393
2036	£275	£321	£279	£343	£410	£402	£465	£280	£185	£418	£222	£142	£352	£243	£313	£424

Source:
Experian MMG3

Table L2: Available leisure spending (£M)

	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	Total
Restaurants, cafes																	
2017	£34	£47	£75	£36	£43	£64	£35	£49	£67	£63	£57	£35	£49	£47	£123	£110	£935
2021	£38	£51	£82	£40	£47	£70	£38	£54	£73	£69	£62	£38	£54	£51	£133	£119	£1,020
2026	£43	£58	£93	£45	£53	£79	£43	£61	£83	£78	£71	£43	£61	£58	£149	£133	£1,149
2031	£48	£65	£104	£50	£59	£89	£49	£69	£93	£87	£79	£49	£69	£64	£165	£148	£1,288
2036	£54	£73	£117	£56	£66	£100	£55	£77	£104	£98	£89	£55	£78	£72	£184	£165	£1,442
Pubs / bars / nightclubs / music venues																	
2017	£12	£17	£24	£12	£15	£23	£13	£15	£16	£23	£15	£9	£17	£13	£43	£41	£309
2021	£12	£17	£24	£12	£15	£23	£13	£15	£16	£22	£14	£9	£17	£13	£43	£41	£307
2026	£14	£19	£27	£14	£16	£26	£14	£17	£18	£25	£16	£10	£19	£14	£48	£46	£346
2031	£15	£21	£31	£16	£18	£29	£16	£19	£21	£29	£18	£12	£22	£16	£54	£51	£388
2036	£17	£24	£34	£17	£21	£32	£18	£22	£23	£32	£20	£13	£24	£18	£60	£58	£434
Cinemas and theatres																	
2017	£11	£3	£5	£3	£3	£5	£3	£3	£3	£5	£3	£2	£3	£2	£8	£9	£70
2021	£12	£3	£5	£3	£4	£5	£3	£3	£3	£6	£3	£2	£4	£3	£9	£9	£77
2026	£14	£4	£6	£3	£4	£6	£4	£4	£4	£6	£4	£3	£4	£3	£9	£10	£87
2031	£15	£4	£6	£4	£4	£7	£4	£4	£4	£7	£4	£3	£5	£3	£11	£12	£97
2036	£17	£5	£7	£4	£5	£8	£5	£5	£4	£8	£4	£3	£5	£4	£12	£13	£109
Games of chance																	
2017	£4	£5	£7	£3	£3	£5	£3	£5	£7	£5	£6	£6	£5	£5	£8	£8	£86
2021	£4	£5	£8	£4	£4	£6	£3	£6	£8	£5	£7	£6	£5	£6	£9	£8	£94
2026	£5	£6	£9	£4	£4	£6	£4	£6	£9	£6	£7	£7	£6	£6	£10	£9	£106
2031	£6	£7	£10	£5	£5	£7	£4	£7	£10	£7	£8	£8	£7	£7	£11	£10	£119
2036	£6	£8	£11	£5	£5	£8	£4	£8	£11	£8	£9	£9	£8	£8	£12	£12	£134
Recreational and sporting services																	
2017	£7	£10	£14	£8	£9	£14	£8	£10	£11	£14	£10	£4	£10	£9	£21	£23	£182
2021	£8	£11	£16	£8	£10	£15	£9	£11	£12	£16	£11	£5	£11	£10	£23	£25	£199
2026	£9	£12	£18	£10	£11	£17	£10	£12	£13	£18	£13	£5	£13	£11	£25	£28	£224
2031	£10	£13	£20	£11	£12	£19	£11	£14	£15	£20	£14	£6	£14	£13	£28	£31	£251
2036	£11	£15	£22	£12	£14	£21	£13	£15	£17	£22	£16	£7	£16	£14	£31	£35	£281

Source:
Experian MMG3

L3a - Restaurants and cafes market share in 2017

	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
Zone 1 total	53.5%	7.0%	3.7%	1.8%	0.0%	0.0%	0.0%	0.0%	0.9%	0.0%	0.0%	0.0%	1.9%	0.0%	0.0%	0.0%
Chipping Barnet centre	53.5%	7.0%	3.7%	1.8%	0.0%	0.0%	0.0%	0.0%	0.9%	0.0%	0.0%	0.0%	1.9%	0.0%	0.0%	0.0%
Zone 2 total	15.0%	9.1%	0.0%	0.0%	0.7%	0.0%	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	3.9%	0.0%	0.0%	0.0%
East Barnet Village centre	0.0%	5.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
New Barnet centre	15.0%	3.6%	0.0%	0.0%	0.7%	0.0%	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	3.9%	0.0%	0.0%	0.0%
Other, zone 2	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 3 total	14.4%	43.8%	56.2%	14.6%	21.8%	1.3%	2.0%	1.4%	2.1%	0.6%	0.9%	3.8%	6.2%	0.8%	1.0%	0.0%
Friern Barnet centre	6.7%	0.0%	2.9%	1.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%	0.0%	0.7%	0.0%	0.5%	0.0%
Friern Bridge Retail Park, Friern Bridge	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Great North Leisure Park, North Finchley	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Great North Road centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
New Southgate centre	0.0%	0.0%	0.0%	0.0%	1.3%	0.0%	0.0%	0.0%	0.7%	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%	0.0%
North Finchley centre	0.0%	3.3%	32.1%	9.1%	17.6%	1.3%	2.0%	0.0%	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	0.5%	0.0%
Other, zone 3	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Whetstone centre	7.7%	40.5%	21.2%	3.6%	2.9%	0.0%	0.0%	1.4%	1.5%	0.0%	0.0%	3.8%	4.7%	0.8%	0.0%	0.0%
Zone 4 total	0.8%	2.8%	0.0%	14.1%	0.0%	0.0%	1.3%	37.7%	2.1%	0.0%	0.0%	3.8%	0.0%	2.5%	0.0%	0.0%
Holders Hill Circus centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Mill Hill centre	0.8%	2.8%	0.0%	14.1%	0.0%	0.0%	1.3%	37.7%	2.1%	0.0%	0.0%	3.8%	0.0%	2.5%	0.0%	0.0%
Zone 5 total	0.8%	0.0%	3.4%	18.2%	39.6%	0.7%	0.0%	0.0%	4.0%	0.7%	3.3%	0.0%	0.0%	0.0%	0.5%	0.0%
Church End, Finchley centre	0.8%	0.0%	3.4%	18.2%	39.6%	0.7%	0.0%	0.0%	4.0%	0.7%	3.3%	0.0%	0.0%	0.0%	0.5%	0.0%
Zone 6 total	0.0%	0.0%	5.7%	0.8%	14.3%	68.3%	27.5%	0.0%	2.0%	3.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%
Colney Hatch Lane centre	0.0%	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%
East Finchley centre	0.0%	0.0%	0.0%	0.8%	14.3%	14.8%	12.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Muswell Hill centre (LBH)	0.0%	0.0%	5.7%	0.0%	0.0%	53.5%	15.3%	0.0%	1.4%	3.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%
Zone 8 total	0.0%	0.0%	0.0%	6.0%	5.6%	0.0%	0.0%	23.1%	21.5%	0.7%	3.8%	1.4%	0.0%	7.3%	3.6%	0.0%
Apex Corner centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Deansbrook Road centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Edgware centre	0.0%	0.0%	0.0%	6.0%	5.6%	0.0%	0.0%	23.1%	21.5%	0.0%	3.4%	1.4%	0.0%	7.3%	3.6%	0.0%
Hale Lane centre	0.0%	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%
Zone 9 total	0.0%	0.0%	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	5.9%	0.0%	10.8%	0.6%	0.0%	4.3%	0.0%	0.0%
Burnt Oak centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Colindale – The Hyde centre	0.0%	0.0%	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	4.6%	0.0%	10.8%	0.6%	0.0%	0.0%	0.0%	0.0%
Grahame Park centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Queensbury Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.3%	0.0%	0.0%	0.0%	0.0%	4.3%	0.0%	0.0%
The Hyde Retail Park, Edgware Rd	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 10 total	0.0%	1.4%	0.0%	7.6%	2.8%	0.0%	20.7%	0.0%	2.1%	54.9%	1.2%	0.0%	0.7%	0.0%	10.7%	0.9%
Brent Street centre	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%	0.7%	0.0%
Childs Hill centre	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%
Golders Green centre	0.0%	1.4%	0.0%	6.2%	1.3%	0.0%	6.5%	0.0%	1.3%	13.0%	1.2%	0.0%	0.0%	0.0%	5.1%	0.9%
Golders Green Road centre	0.0%	0.0%	0.0%	1.4%	0.8%	0.0%	1.2%	0.0%	0.0%	36.6%	0.0%	0.0%	0.7%	0.0%	5.0%	0.0%
Temple Fortune centre	0.0%	0.0%	0.0%	0.0%	0.7%	0.0%	12.4%	0.0%	0.0%	5.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 11 total	0.0%	0.0%	0.0%	4.1%	0.7%	0.0%	1.8%	2.0%	11.1%	4.7%	15.9%	0.0%	0.0%	5.3%	3.1%	0.0%
Brent South Shopping Park, Brent Cross	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.2%	1.2%	0.0%	0.0%	10.1%	0.0%	0.0%	0.0%	3.1%	0.0%
Broadway Retail Park, Cricklewood	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Hendon Central centre	0.0%	0.0%	0.0%	4.1%	0.7%	0.0%	0.6%	0.8%	11.1%	4.7%	5.2%	0.0%	0.0%	5.3%	0.0%	0.0%
Silkbridge Retail Park, Hendon	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Staples Corner, Geron Way, Cricklewood	0.0%	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%
West Hendon centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 12 total	0.8%	1.5%	0.0%	0.0%	1.3%	1.0%	0.0%	0.8%	0.7%	0.0%	3.9%	62.3%	0.0%	0.6%	0.0%	0.0%
Borehamwood centre	0.8%	1.5%	0.0%	0.0%	1.3%	1.0%	0.0%	0.8%	0.7%	0.0%	3.9%	61.1%	0.0%	0.6%	0.0%	0.0%
Borehamwood Shopping Park	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.2%	0.0%	0.0%	0.0%	0.0%
Stirling Retail Park, Borehamwood	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 13 total	0.0%	1.7%	0.8%	0.6%	1.4%	0.0%	1.2%	0.0%	0.0%	5.3%	3.3%	0.0%	30.6%	0.0%	0.0%	0.0%
Hampden Square centre (LBB)	0.0%	0.0%	0.0%	0.6%	1.4%	0.0%	0.0%	0.0%	0.0%	4.6%	3.3%	0.0%	0.0%	0.0%	0.0%	0.0%
Southgate centre	0.0%	1.7%	0.8%	0.0%	0.0%	0.0%	1.2%	0.0%	0.0%	0.7%	0.0%	0.0%	30.6%	0.0%	0.0%	0.0%
Zone 14 total	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	1.5%	0.0%	5.7%	0.8%	0.0%	11.9%	0.0%	0.0%
Kingsbury Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%	0.0%	5.2%	0.0%	0.0%	1.2%	0.0%	0.0%
Stanmore Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%	0.5%	0.8%	0.0%	10.7%	0.0%	0.0%
Zone 15 total	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	11.5%	0.0%	0.0%	0.0%	28.2%	0.0%
Cricklewood centre (LBB)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	7.6%	0.0%	0.0%	0.0%	5.4%	0.0%
Kilburn Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.9%	0.0%	0.0%	0.0%	6.7%	0.0%
Other, zone 15	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	0.0%
West Hampstead Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	8.8%	0.0%
Willesden Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	6.7%	0.0%
Zone 16 total	0.0%	0.0%	0.0%	0.0%	0.8%	3.1%	13.9%	0.0%	0.0%	13.0%	0.0%	0.0%	0.0%	0.0%	7.7%	36.5%
Hampstead Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	6.9%	0.0%	0.0%	13.0%	0.0%	0.0%	0.0%	0.0%	3.3%	4.7%
Highgate Centre	0.0%	0.0%	0.0%	0.0%	0.0%	3.1%	7.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.4%	9.8%
Kentish Town Centre	0.0%	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	18.9%
Other, zone 16	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.1%
Central London total	7.4%	23.7%	23.5%	31.5%	9.7%	20.2%	30.2%	15.1%	26.3%	15.2%	14.5%	7.3%	17.9%	12.1%	32.6%	23.9%
Central London / West End	7.4%	23.7%	23.5%	31.5%	9.7%	20.2%	30.2%	15.1%	26.3%	15.2%	14.5%	7.3%	17.9%	12.1%	32.6%	23.9%
Outside study area	7.4%	9.1%	6.6%	0.0%	1.3%	5.4%	1.2%	18.4%	19.7%	1.6%	25.2%	19.9%	38.8%	55.1%	12.5%	37.7%
Study area sub-total	14.8%	32.8%	30.1%	31.5%	11.0%	25.6%	31.4%	33.5%	45.9%	16.8%	39.8%	27.2%	56.8%	67.2%	45.1%	61.6%
Outside study area sub total	85.2%	67.2%	69.9%	68.5%	89.0%	74.4%	68.6%	66.5%	54.1%	83.2%	60.2%	72.8%	43.2%	32.8%	54.9%	38.4%
Grand 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%**

L3b - Restaurants and cafes market share in 2017

	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	Total
Zone 1 total	£18.39	£3.26	£2.75	£0.67	£0.00	£0.00	£0.00	£0.00	£0.57	£0.00	£0.00	£0.00	£0.94	£0.00	£0.00	£0.00	£26.58
Chipping Barnet centre	£18.39	£3.26	£2.75	£0.67	£0.00	£0.00	£0.00	£0.00	£0.57	£0.00	£0.00	£0.00	£0.94	£0.00	£0.00	£0.00	£26.58
Zone 2 total	£5.16	£4.26	£0.00	£0.00	£0.28	£0.00	£0.00	£0.31	£0.00	£0.00	£0.00	£0.00	£1.92	£0.00	£0.00	£0.00	£11.94
East Barnet Village centre	£0.00	£2.58	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£2.58
New Barnet centre	£5.16	£1.69	£0.00	£0.00	£0.28	£0.00	£0.00	£0.31	£0.00	£0.00	£0.00	£0.00	£1.92	£0.00	£0.00	£0.00	£9.36
Other, zone 2	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Zone 3 total	£4.94	£20.50	£42.07	£5.29	£9.27	£0.85	£0.71	£0.68	£1.43	£0.35	£0.52	£1.33	£3.06	£0.38	£1.28	£0.00	£92.66
Friern Barnet centre	£2.29	£0.00	£2.19	£0.69	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.52	£0.00	£0.32	£0.00	£0.64	£0.00	£6.65
Friern Bridge Retail Park, Friern Bridge	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Great North Leisure Park, North Finchley	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Great North Road centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
New Southgate centre	£0.00	£0.00	£0.00	£0.00	£0.54	£0.00	£0.00	£0.00	£0.45	£0.00	£0.00	£0.00	£0.41	£0.00	£0.00	£0.00	£1.40
North Finchley centre	£0.00	£1.53	£24.02	£3.29	£7.49	£0.85	£0.71	£0.00	£0.00	£0.35	£0.00	£0.00	£0.00	£0.00	£0.64	£0.00	£38.87
Other, zone 3	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Whetstone centre	£2.65	£18.98	£15.86	£1.31	£1.25	£0.00	£0.00	£0.68	£0.98	£0.00	£0.00	£1.33	£2.33	£0.38	£0.00	£0.00	£45.74
Zone 4 total	£0.27	£1.31	£0.00	£5.12	£0.00	£0.00	£0.47	£18.55	£1.44	£0.00	£0.00	£1.33	£0.00	£1.20	£0.00	£0.00	£29.69
Holders Hill Circus centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Mill Hill centre	£0.27	£1.31	£0.00	£5.12	£0.00	£0.00	£0.47	£18.55	£1.44	£0.00	£0.00	£1.33	£0.00	£1.20	£0.00	£0.00	£29.69
Zone 5 total	£0.27	£0.00	£2.58	£6.58	£16.85	£0.42	£0.00	£0.00	£2.70	£0.44	£1.89	£0.00	£0.00	£0.00	£0.64	£0.00	£32.38
Church End, Finchley centre	£0.27	£0.00	£2.58	£6.58	£16.85	£0.42	£0.00	£0.00	£2.70	£0.44	£1.89	£0.00	£0.00	£0.00	£0.64	£0.00	£32.38
Zone 6 total	£0.00	£0.00	£4.30	£0.29	£6.09	£43.78	£9.65	£0.00	£1.36	£2.08	£0.00	£0.00	£0.00	£0.00	£0.00	£1.04	£68.61
Colney Hatch Lane centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.45	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.45
East Finchley centre	£0.00	£0.00	£0.00	£0.29	£6.09	£9.50	£4.27	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£20.16
Muswell Hill centre (LBH)	£0.00	£0.00	£4.30	£0.00	£0.00	£34.28	£5.38	£0.00	£0.91	£2.08	£0.00	£0.00	£0.00	£0.00	£0.00	£1.04	£47.99
Zone 8 total	£0.00	£0.00	£0.00	£2.17	£2.37	£0.00	£0.00	£11.40	£14.40	£0.44	£2.18	£0.48	£0.00	£3.48	£4.44	£0.00	£41.37
Apex Corner centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.44	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.44
Deansbrook Road centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Edgware centre	£0.00	£0.00	£0.00	£2.17	£2.37	£0.00	£0.00	£11.40	£14.40	£0.00	£1.92	£0.48	£0.00	£3.48	£4.44	£0.00	£40.66
Hale Lane centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.26	£0.00	£0.00	£0.00	£0.00	£0.00	£0.26
Zone 9 total	£0.00	£0.00	£0.00	£0.23	£0.00	£0.00	£0.00	£0.00	£3.95	£0.00	£6.14	£0.22	£0.00	£2.06	£0.00	£0.00	£12.60
Burnt Oak centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Colindale – The Hyde centre	£0.00	£0.00	£0.00	£0.23	£0.00	£0.00	£0.00	£0.00	£3.08	£0.00	£6.14	£0.22	£0.00	£0.00	£0.00	£0.00	£9.68
Grahame Park centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Queensbury Centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.86	£0.00	£0.00	£0.00	£0.00	£2.06	£0.00	£0.00	£2.92
The Hyde Retail Park, Edgware Rd	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Zone 10 total	£0.00	£0.65	£0.00	£2.75	£1.20	£0.00	£7.28	£0.00	£1.44	£34.45	£0.66	£0.00	£0.32	£0.00	£13.24	£1.04	£63.04
Brent Street centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.57	£0.00	£0.00	£0.00	£0.00	£0.00	£0.81	£0.00	£1.38
Childs Hill centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.22	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.22
Golders Green centre	£0.00	£0.65	£0.00	£2.23	£0.56	£0.00	£2.28	£0.00	£0.86	£8.15	£0.66	£0.00	£0.00	£0.00	£6.23	£1.04	£22.67
Golders Green Road centre	£0.00	£0.00	£0.00	£0.52	£0.36	£0.00	£0.44	£0.00	£0.00	£22.97	£0.00	£0.00	£0.32	£0.00	£6.20	£0.00	£30.80
Temple Fortune centre	£0.00	£0.00	£0.00	£0.00	£0.28	£0.00	£4.34	£0.00	£0.00	£3.34	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£7.96
Zone 11 total	£0.00	£0.00	£0.00	£1.48	£0.28	£0.00	£0.64	£1.00	£7.44	£2.96	£9.07	£0.00	£0.00	£2.50	£3.80	£0.00	£29.15
Brent South Shopping Park, Brent Cross	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.42	£0.60	£0.00	£0.00	£5.77	£0.00	£0.00	£0.00	£3.80	£0.00	£10.59
Broadway Retail Park, Cricklewood	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Hendon Central centre	£0.00	£0.00	£0.00	£1.48	£0.28	£0.00	£0.22	£0.40	£7.44	£2.96	£2.96	£0.00	£0.00	£2.50	£0.00	£0.00	£18.23
Silkbridge Retail Park, Hendon	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Staples Corner, Geron Way, Cricklewood	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.33	£0.00	£0.00	£0.00	£0.00	£0.00	£0.33
West Hendon centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Zone 12 total	£0.27	£0.69	£0.00	£0.00	£0.54	£0.64	£0.00	£0.40	£0.45	£0.00	£2.20	£21.70	£0.00	£0.30	£0.00	£0.00	£27.19
Borehamwood centre	£0.27	£0.69	£0.00	£0.00	£0.54	£0.64	£0.00	£0.40	£0.45	£0.00	£2.20	£21.27	£0.00	£0.30	£0.00	£0.00	£26.76
Borehamwood Shopping Park	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.43	£0.00	£0.00	£0.00	£0.00	£0.43
Stirling Retail Park, Borehamwood	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Zone 13 total	£0.00	£0.78	£0.62	£0.23	£0.61	£0.00	£0.42	£0.00	£0.00	£3.32	£1.89	£0.00	£15.07	£0.00	£0.00	£0.00	£22.93
Hampden Square centre (LBB)	£0.00	£0.00	£0.00	£0.23	£0.61	£0.00	£0.00	£0.00	£0.00	£2.88	£1.89	£0.00	£0.00	£0.00	£0.00	£0.00	£5.60
Southgate centre	£0.00	£0.78	£0.62	£0.00	£0.00	£0.00	£0.42	£0.00	£0.00	£0.44	£0.00	£0.00	£15.07	£0.00	£0.00	£0.00	£17.33
Zone 14 total	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.40	£1.03	£0.00	£3.25	£0.28	£0.00	£5.65	£0.00	£0.00	£10.62
Kingsbury Centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£1.03	£0.00	£2.99	£0.00	£0.00	£0.56	£0.00	£0.00	£4.58
Stanmore Centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.40	£0.00	£0.00	£0.26	£0.28	£0.00	£5.09	£0.00	£0.00	£6.03
Zone 15 total	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£6.57	£0.00	£0.00	£0.00	£34.75	£0.00	£41.32
Cricklewood centre (LBB)	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£4.36	£0.00	£0.00	£0.00	£6.69	£0.00	£11.06
Kilburn Centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£2.20	£0.00	£0.00	£0.00	£8.31	£0.00	£10.52
Other, zone 15	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.64	£0.00	£0.64
West Hampstead Centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£10.89	£0.00	£10.89
Willesden Centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£8.22	£0.00	£8.22
Zone 16 total	£0.00	£0.00	£0.00	£0.00	£0.36	£1.99	£4.89	£0.00	£0.00	£8.12	£0.00	£0.00	£0.00	£0.00	£9.50	£40.24	£65.11
Hampstead Centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£2.41	£0.00	£0.00	£8.12	£0.00	£0.00	£0.00	£0.00	£4.11	£5.22	£19.86
Highgate Centre	£0.00	£0.00	£0.00	£0.00	£0.00	£1.99	£2.49	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£5.39	£10.78	£20.65
Kentish Town Centre	£0.00	£0.00	£0.00	£0.00	£0.36	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£20.84	£21.20
Other, zone 16	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£3.41	£3.41
Central London total	£2.53	£11.12	£17.55	£11.42	£4.12	£12.93	£10.59	£7.44	£17.62	£9.51	£8.30	£2.53	£8.84	£5.72	£40.18	£26.34	£196.74
Central London / West End	£2.53	£11.12	£17.55	£11.42	£4.12	£12.93	£10.59	£7.44	£17.62	£9.51	£8.30	£2.53	£8.84	£5.72	£40.18	£26.34	£196.74
Outside study area	£2.56	£4.26	£4.94	£0.00	£0.54	£3.47	£0.44	£9.08	£13.17	£1.02	£14.39	£6.94	£19.14	£26.11	£15.39	£41.54	£162.99
Study area sub-total	£29.31	£31.46	£52.31	£24.81	£37.84	£47.68	£24.07	£32.74	£36.22	£52.17	£34.37	£25.36	£21.31	£15.56	£67.64	£42.33	£575.17
Outside study area sub total	£5.09	£15.38	£22.49	£11.42	£4.66	£16.40	£11.03	£16.51	£30.79	£10.53	£22.69	£9.47	£27.98	£31.83	£55.57	£67.88	£359.72
Grand total	**£34.40**	**£46.85**	**£74.80**	**£36.23**	**£42.50**	**£64.08**	**£35.09**	**£49.25**	**£67.01**	**£62.70**	**£57.06**	**£34.83**	**£49.29**	**£47.39**	**£123.21**	**£110.21**	**£934.90**

L4a - Pubs / bars / nightclubs / music venues market share in 2017

	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
Zone 1 total	61.3%	17.3%	3.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Chipping Barnet centre	61.3%	17.3%	3.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 2 total	9.8%	29.1%	0.0%	0.0%	1.2%	0.0%	0.0%	6.6%	0.0%	0.0%	1.6%	0.0%	0.0%	0.0%	0.0%	0.0%
East Barnet Village centre	1.3%	22.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
New Barnet centre	8.5%	6.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.6%	0.0%	0.0%	0.0%	0.0%	0.0%
Other, zone 2	0.0%	0.0%	0.0%	0.0%	1.2%	0.0%	0.0%	6.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 3 total	15.0%	19.1%	67.5%	23.1%	16.3%	1.8%	0.0%	6.6%	8.4%	0.0%	0.0%	12.7%	2.2%	1.2%	0.9%	0.0%
Friern Barnet centre	11.2%	1.2%	12.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.2%	0.0%	0.9%	0.0%
Friern Bridge Retail Park, Friern Bridge	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Great North Leisure Park, North Finchley	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Great North Road centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
New Southgate centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
North Finchley centre	0.0%	3.9%	44.7%	19.7%	16.3%	1.8%	0.0%	6.6%	8.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other, zone 3	0.0%	0.0%	1.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Whetstone centre	3.8%	14.0%	9.0%	3.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	12.7%	0.0%	1.2%	0.0%	0.0%
Zone 4 total	0.0%	0.0%	0.0%	15.5%	0.0%	0.0%	0.0%	29.5%	1.3%	0.0%	1.6%	0.0%	0.0%	0.0%	5.6%	0.0%
Holders Hill Circus centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Mill Hill centre	0.0%	0.0%	0.0%	15.5%	0.0%	0.0%	0.0%	29.5%	1.3%	0.0%	1.6%	0.0%	0.0%	0.0%	5.6%	0.0%
Zone 5 total	0.0%	0.0%	3.9%	20.6%	33.7%	0.0%	0.0%	0.0%	0.0%	0.0%	7.4%	0.0%	0.0%	0.0%	0.0%	0.0%
Church End, Finchley centre	0.0%	0.0%	3.9%	20.6%	33.7%	0.0%	0.0%	0.0%	0.0%	0.0%	7.4%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 6 total	0.0%	0.0%	12.8%	2.5%	1.2%	69.4%	21.6%	0.0%	0.0%	8.0%	0.0%	0.0%	6.9%	0.0%	0.0%	0.0%
Colney Hatch Lane centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
East Finchley centre	0.0%	0.0%	7.2%	2.5%	1.2%	12.4%	4.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Muswell Hill centre (LBH)	0.0%	0.0%	5.5%	0.0%	0.0%	57.0%	17.2%	0.0%	0.0%	8.0%	0.0%	0.0%	6.9%	0.0%	0.0%	0.0%
Zone 8 total	0.0%	0.0%	0.0%	9.2%	0.0%	0.0%	0.0%	19.1%	6.5%	0.0%	0.0%	0.0%	0.0%	9.5%	0.0%	0.0%
Apex Corner centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Deansbrook Road centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Edgware centre	0.0%	0.0%	0.0%	9.2%	0.0%	0.0%	0.0%	19.1%	6.5%	0.0%	0.0%	0.0%	0.0%	9.5%	0.0%	0.0%
Hale Lane centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 9 total	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.1%	4.8%	0.0%	8.7%	0.0%	0.0%	1.2%	0.0%	0.0%
Burnt Oak centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Colindale – The Hyde centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.8%	0.0%	8.7%	0.0%	0.0%	0.0%	0.0%	0.0%
Grahame Park centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Queensbury Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.1%	0.0%	0.0%	0.0%	0.0%	0.0%	1.2%	0.0%	0.0%
The Hyde Retail Park, Edgware Rd	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 10 total	0.0%	0.0%	1.7%	9.2%	1.9%	0.0%	5.7%	9.3%	0.0%	35.2%	2.4%	0.0%	0.0%	0.0%	5.6%	0.0%
Brent Street centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.6%	0.0%
Childs Hill centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Golders Green centre	0.0%	0.0%	0.0%	9.2%	0.9%	0.0%	1.3%	0.0%	0.0%	21.1%	2.4%	0.0%	0.0%	0.0%	0.0%	0.0%
Golders Green Road centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	9.3%	0.0%	11.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Temple Fortune centre	0.0%	0.0%	1.7%	0.0%	0.9%	0.0%	4.4%	0.0%	0.0%	2.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 11 total	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.1%	0.0%	1.2%	0.0%	0.0%	0.0%	0.0%	0.0%
Brent South Shopping Park, Brent Cross	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Broadway Retail Park, Cricklewood	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Hendon Central centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.1%	0.0%	1.2%	0.0%	0.0%	0.0%	0.0%	0.0%
Silkbridge Retail Park, Hendon	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Staples Corner, Geron Way, Cricklewood	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
West Hendon centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 12 total	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	73.5%	0.0%	0.0%	0.0%	0.0%
Borehamwood centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	73.5%	0.0%	0.0%	0.0%	0.0%
Borehamwood Shopping Park	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Stirling Retail Park, Borehamwood	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 13 total	0.0%	0.0%	3.3%	0.0%	0.0%	1.5%	2.4%	0.0%	1.3%	3.4%	1.6%	0.0%	21.6%	0.0%	0.0%	0.0%
Hampden Square centre (LBB)	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%	2.4%	0.0%	1.3%	3.4%	1.6%	0.0%	0.0%	0.0%	0.0%	0.0%
Southgate centre	0.0%	0.0%	3.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	21.6%	0.0%	0.0%	0.0%
Zone 14 total	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.6%	0.0%	0.0%	3.7%	0.0%	0.0%
Kingsbury Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.6%	0.0%	0.0%	1.9%	0.0%	0.0%
Stanmore Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.9%	0.0%	0.0%
Zone 15 total	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	18.5%	0.0%	0.0%	0.0%	18.1%	0.0%
Cricklewood centre (LBB)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	15.3%	0.0%	0.0%	0.0%	1.2%	0.0%
Kilburn Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.4%	0.0%
Other, zone 15	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.6%	0.0%	0.0%	0.0%	0.0%	0.0%
West Hampstead Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.4%	0.0%
Willesden Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.6%	0.0%	0.0%	0.0%	9.1%	0.0%
Zone 16 total	0.0%	2.6%	0.0%	1.1%	4.8%	8.0%	41.8%	1.4%	0.0%	30.6%	0.0%	2.1%	0.0%	0.0%	6.9%	40.6%
Hampstead Centre	0.0%	0.0%	0.0%	1.1%	3.6%	0.0%	15.0%	0.0%	0.0%	29.2%	0.0%	2.1%	0.0%	0.0%	6.9%	8.4%
Highgate Centre	0.0%	2.6%	0.0%	0.0%	0.0%	8.0%	19.3%	1.4%	0.0%	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%	12.0%
Kentish Town Centre	0.0%	0.0%	0.0%	0.0%	1.2%	0.0%	7.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	20.2%
Other, zone 16	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Central London total	9.7%	26.4%	3.9%	15.6%	40.0%	17.2%	26.0%	15.3%	59.0%	21.1%	41.4%	0.0%	31.7%	29.0%	43.7%	23.1%
Central London / West End	9.7%	26.4%	3.9%	15.6%	40.0%	17.2%	26.0%	15.3%	59.0%	21.1%	41.4%	0.0%	31.7%	29.0%	43.7%	23.1%
Outside study area	4.2%	5.5%	3.3%	3.2%	0.9%	2.0%	2.5%	10.1%	17.6%	1.7%	14.1%	11.6%	37.7%	55.3%	19.1%	36.4%
Study area sub-total	86.1%	68.1%	92.8%	81.2%	59.0%	80.8%	71.5%	74.6%	23.4%	77.2%	44.5%	88.4%	30.7%	15.7%	37.1%	40.6%
Outside study area sub total	13.9%	31.9%	7.2%	18.8%	41.0%	19.2%	28.5%	25.4%	76.6%	22.8%	55.5%	11.6%	69.3%	84.3%	62.9%	59.4%
Grand 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%

L4a - Pubs / bars / nightclubs / music venues turnover in 2017

	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	Total
Zone 1 total	£7.55	£2.91	£0.84	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£11.30
Chipping Barnet centre	£7.55	£2.91	£0.84	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£11.30
Zone 2 total	£1.21	£4.89	£0.00	£0.00	£0.17	£0.00	£0.00	£1.02	£0.00	£0.00	£0.23	£0.00	£0.00	£0.00	£0.00	£0.00	£7.52
East Barnet Village centre	£0.16	£3.77	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£3.94
New Barnet centre	£1.05	£1.11	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.23	£0.00	£0.00	£0.00	£0.00	£0.00	£2.39
Other, zone 2	£0.00	£0.00	£0.00	£0.00	£0.17	£0.00	£0.00	£1.02	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£1.19
Zone 3 total	£1.85	£3.21	£16.39	£2.86	£2.40	£0.42	£0.00	£1.02	£1.38	£0.00	£0.00	£1.19	£0.38	£0.16	£0.41	£0.00	£31.65
Friern Barnet centre	£1.37	£0.20	£2.93	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.38	£0.00	£0.41	£0.00	£5.30
Friern Bridge Retail Park, Friern Bridge	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Great North Leisure Park, North Finchley	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Great North Road centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
New Southgate centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
North Finchley centre	£0.00	£0.65	£10.86	£2.43	£2.40	£0.42	£0.00	£1.02	£1.38	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£19.15
Other, zone 3	£0.00	£0.00	£0.42	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.42
Whetstone centre	£0.47	£2.35	£2.18	£0.43	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£1.19	£0.00	£0.16	£0.00	£0.00	£6.78
Zone 4 total	£0.00	£0.00	£0.00	£1.91	£0.00	£0.00	£0.00	£4.57	£0.22	£0.00	£0.23	£0.00	£0.00	£0.00	£2.42	£0.00	£9.35
Holders Hill Circus centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Mill Hill centre	£0.00	£0.00	£0.00	£1.91	£0.00	£0.00	£0.00	£4.57	£0.22	£0.00	£0.23	£0.00	£0.00	£0.00	£2.42	£0.00	£9.35
Zone 5 total	£0.00	£0.00	£0.96	£2.54	£4.96	£0.00	£0.00	£0.00	£0.00	£0.00	£1.08	£0.00	£0.00	£0.00	£0.00	£0.00	£9.53
Church End, Finchley centre	£0.00	£0.00	£0.96	£2.54	£4.96	£0.00	£0.00	£0.00	£0.00	£0.00	£1.08	£0.00	£0.00	£0.00	£0.00	£0.00	£9.53
Zone 6 total	£0.00	£0.00	£3.10	£0.31	£0.17	£15.87	£2.77	£0.00	£0.00	£1.82	£0.00	£0.00	£1.19	£0.00	£0.00	£0.00	£25.22
Colney Hatch Lane centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
East Finchley centre	£0.00	£0.00	£1.76	£0.31	£0.17	£2.83	£0.57	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£5.64
Muswell Hill centre (LBH)	£0.00	£0.00	£1.34	£0.00	£0.00	£13.04	£2.20	£0.00	£0.00	£1.82	£0.00	£0.00	£1.19	£0.00	£0.00	£0.00	£19.59
Zone 8 total	£0.00	£0.00	£0.00	£1.14	£0.00	£0.00	£0.00	£2.96	£1.07	£0.00	£0.00	£0.00	£0.00	£1.22	£0.00	£0.00	£6.39
Apex Corner centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Deansbrook Road centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Edgware centre	£0.00	£0.00	£0.00	£1.14	£0.00	£0.00	£0.00	£2.96	£1.07	£0.00	£0.00	£0.00	£0.00	£1.22	£0.00	£0.00	£6.39
Hale Lane centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Zone 9 total	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.33	£0.80	£0.00	£1.26	£0.00	£0.00	£0.16	£0.00	£0.00	£2.54
Burnt Oak centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Colindale – The Hyde centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.80	£0.00	£1.26	£0.00	£0.00	£0.00	£0.00	£0.00	£2.05
Grahame Park centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Queensbury Centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.33	£0.00	£0.00	£0.00	£0.00	£0.00	£0.16	£0.00	£0.00	£0.49
The Hyde Retail Park, Edgware Rd	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Zone 10 total	£0.00	£0.00	£0.42	£1.14	£0.28	£0.00	£0.73	£1.45	£0.00	£7.99	£0.34	£0.00	£0.00	£0.00	£2.42	£0.00	£14.77
Brent Street centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£2.42	£0.00	£2.42
Childs Hill centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Golders Green centre	£0.00	£0.00	£0.00	£1.14	£0.14	£0.00	£0.16	£0.00	£0.00	£4.79	£0.34	£0.00	£0.00	£0.00	£0.00	£0.00	£6.57
Golders Green Road centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£1.45	£0.00	£2.59	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£4.04
Temple Fortune centre	£0.00	£0.00	£0.42	£0.00	£0.14	£0.00	£0.57	£0.00	£0.00	£0.61	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£1.74
Zone 11 total	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.18	£0.00	£0.18	£0.00	£0.00	£0.00	£0.00	£0.00	£0.36
Brent South Shopping Park, Brent Cross	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Broadway Retail Park, Cricklewood	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Hendon Central centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.18	£0.00	£0.18	£0.00	£0.00	£0.00	£0.00	£0.00	£0.36
Silkbridge Retail Park, Hendon	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Staples Corner, Geron Way, Cricklewood	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
West Hendon centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Zone 12 total	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£6.86	£0.00	£0.00	£0.00	£0.00	£6.86
Borehamwood centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£6.86	£0.00	£0.00	£0.00	£0.00	£6.86
Borehamwood Shopping Park	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Stirling Retail Park, Borehamwood	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Zone 13 total	£0.00	£0.00	£0.80	£0.00	£0.00	£0.35	£0.30	£0.00	£0.22	£0.77	£0.23	£0.00	£3.70	£0.00	£0.00	£0.00	£6.38
Hampden Square centre (LBB)	£0.00	£0.00	£0.00	£0.00	£0.00	£0.35	£0.30	£0.00	£0.22	£0.77	£0.23	£0.00	£0.00	£0.00	£0.00	£0.00	£1.88
Southgate centre	£0.00	£0.00	£0.80	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£3.70	£0.00	£0.00	£0.00	£4.50
Zone 14 total	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.23	£0.00	£0.00	£0.48	£0.00	£0.00	£0.71
Kingsbury Centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.23	£0.00	£0.00	£0.24	£0.00	£0.00	£0.47
Stanmore Centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.24	£0.00	£0.00	£0.24
Zone 15 total	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£2.68	£0.00	£0.00	£0.00	£7.82	£0.00	£10.50
Cricklewood centre (LBB)	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£2.22	£0.00	£0.00	£0.00	£0.52	£0.00	£2.74
Kilburn Centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£1.03	£0.00	£1.03
Other, zone 15	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.23	£0.00	£0.00	£0.00	£0.00	£0.00	£0.23
West Hampstead Centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£2.32	£0.00	£2.32
Willesden Centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.23	£0.00	£0.00	£0.00	£3.95	£0.00	£4.18
Zone 16 total	£0.00	£0.44	£0.00	£0.13	£0.70	£1.84	£5.35	£0.22	£0.00	£6.95	£0.00	£0.20	£0.00	£0.00	£2.99	£16.74	£35.56
Hampstead Centre	£0.00	£0.00	£0.00	£0.13	£0.53	£0.00	£1.92	£0.00	£0.00	£6.64	£0.00	£0.20	£0.00	£0.00	£2.99	£3.48	£15.89
Highgate Centre	£0.00	£0.44	£0.00	£0.00	£0.00	£1.84	£2.47	£0.22	£0.00	£0.31	£0.00	£0.00	£0.00	£0.00	£0.00	£4.93	£10.21
Kentish Town Centre	£0.00	£0.00	£0.00	£0.00	£0.17	£0.00	£0.95	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£8.33	£9.46
Other, zone 16	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Central London total	£1.20	£4.43	£0.96	£1.92	£5.89	£3.92	£3.33	£2.37	£9.73	£4.79	£6.00	£0.00	£5.44	£3.75	£18.92	£9.51	£82.15
Central London / West End	£1.20	£4.43	£0.96	£1.92	£5.89	£3.92	£3.33	£2.37	£9.73	£4.79	£6.00	£0.00	£5.44	£3.75	£18.92	£9.51	£82.15
Outside study area	£0.51	£0.93	£0.80	£0.39	£0.14	£0.47	£0.32	£1.56	£2.90	£0.39	£2.05	£1.09	£6.47	£7.15	£8.28	£14.99	£48.44
Study area sub-total	£10.61	£11.44	£22.51	£10.02	£8.69	£18.48	£9.15	£11.56	£3.86	£17.54	£6.46	£8.25	£5.27	£2.02	£16.06	£16.74	£178.65
Outside study area sub total	£1.71	£5.36	£1.76	£2.32	£6.02	£4.39	£3.65	£3.93	£12.63	£5.18	£8.06	£1.09	£11.90	£10.90	£27.20	£24.50	£130.59
Grand total	**£12.32**	**£16.81**	**£24.27**	**£12.34**	**£14.71**	**£22.87**	**£12.80**	**£15.49**	**£16.49**	**£22.71**	**£14.51**	**£9.34**	**£17.17**	**£12.92**	**£43.25**	**£41.24**	**£309.24**

L5 - Food & drink (A3-A5) turnover in 2017

	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	Total
Zone 1 total	£25.94	£6.17	£3.59	£0.67	£0.00	£0.00	£0.00	£0.00	£0.57	£0.00	£0.00	£0.00	£0.94	£0.00	£0.00	£0.00	£37.88
Chipping Barnet centre	£25.94	£6.17	£3.59	£0.67	£0.00	£0.00	£0.00	£0.00	£0.57	£0.00	£0.00	£0.00	£0.94	£0.00	£0.00	£0.00	£37.88
Zone 2 total	£6.37	£9.15	£0.00	£0.00	£0.46	£0.00	£0.00	£1.33	£0.00	£0.00	£0.23	£0.00	£1.92	£0.00	£0.00	£0.00	£19.46
East Barnet Village centre	£0.16	£6.35	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£6.51
New Barnet centre	£6.21	£2.80	£0.00	£0.00	£0.28	£0.00	£0.00	£0.31	£0.00	£0.00	£0.23	£0.00	£1.92	£0.00	£0.00	£0.00	£11.75
Other, zone 2	£0.00	£0.00	£0.00	£0.00	£0.17	£0.00	£0.00	£1.02	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£1.19
Zone 3 total	£6.78	£23.71	£58.46	£8.14	£11.67	£1.26	£0.71	£1.70	£2.81	£0.35	£0.52	£2.52	£3.44	£0.54	£1.69	£0.00	£124.31
Friern Barnet centre	£3.66	£0.20	£5.12	£0.69	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.52	£0.00	£0.70	£0.00	£1.05	£0.00	£11.95
Friern Bridge Retail Park, Friern Bridge	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Great North Leisure Park, North Finchley	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Great North Road centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
New Southgate centre	£0.00	£0.00	£0.00	£0.00	£0.54	£0.00	£0.00	£0.00	£0.45	£0.00	£0.00	£0.00	£0.41	£0.00	£0.00	£0.00	£1.40
North Finchley centre	£0.00	£2.18	£34.88	£5.71	£9.89	£1.26	£0.71	£1.02	£1.38	£0.35	£0.00	£0.00	£0.00	£0.00	£0.64	£0.00	£58.03
Other, zone 3	£0.00	£0.00	£0.42	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.42
Whetstone centre	£3.12	£21.33	£18.04	£1.74	£1.25	£0.00	£0.00	£0.68	£0.98	£0.00	£0.00	£2.52	£2.33	£0.54	£0.00	£0.00	£52.52
Zone 4 total	£0.27	£1.31	£0.00	£7.03	£0.00	£0.00	£0.47	£23.12	£1.66	£0.00	£0.23	£1.33	£0.00	£1.20	£2.42	£0.00	£39.05
Holders Hill Circus centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Mill Hill centre	£0.27	£1.31	£0.00	£7.03	£0.00	£0.00	£0.47	£23.12	£1.66	£0.00	£0.23	£1.33	£0.00	£1.20	£2.42	£0.00	£39.05
Zone 5 total	£0.27	£0.00	£3.54	£9.12	£21.81	£0.42	£0.00	£0.00	£2.70	£0.44	£2.96	£0.00	£0.00	£0.00	£0.64	£0.00	£41.90
Church End, Finchley centre	£0.27	£0.00	£3.54	£9.12	£21.81	£0.42	£0.00	£0.00	£2.70	£0.44	£2.96	£0.00	£0.00	£0.00	£0.64	£0.00	£41.90
Zone 6 total	£0.00	£0.00	£7.40	£0.60	£6.27	£59.66	£12.42	£0.00	£1.36	£3.90	£0.00	£0.00	£1.19	£0.00	£0.00	£1.04	£93.83
Colney Hatch Lane centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.45	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.45
East Finchley centre	£0.00	£0.00	£1.76	£0.60	£6.27	£12.33	£4.84	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£25.80
Muswell Hill centre (LBH)	£0.00	£0.00	£5.64	£0.00	£0.00	£47.32	£7.58	£0.00	£0.91	£3.90	£0.00	£0.00	£1.19	£0.00	£0.00	£1.04	£67.58
Zone 8 total	£0.00	£0.00	£0.00	£3.31	£2.37	£0.00	£0.00	£14.36	£15.47	£0.44	£2.18	£0.48	£0.00	£4.70	£4.44	£0.00	£47.76
Apex Corner centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.44	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.44
Deansbrook Road centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Edgware centre	£0.00	£0.00	£0.00	£3.31	£2.37	£0.00	£0.00	£14.36	£15.47	£0.00	£1.92	£0.48	£0.00	£4.70	£4.44	£0.00	£47.05
Hale Lane centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.26	£0.00	£0.00	£0.00	£0.00	£0.00	£0.26
Zone 9 total	£0.00	£0.00	£0.00	£0.23	£0.00	£0.00	£0.00	£0.33	£4.74	£0.00	£7.40	£0.22	£0.00	£2.22	£0.00	£0.00	£15.14
Burnt Oak centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Colindale – The Hyde centre	£0.00	£0.00	£0.00	£0.23	£0.00	£0.00	£0.00	£0.00	£3.88	£0.00	£7.40	£0.22	£0.00	£0.00	£0.00	£0.00	£11.73
Grahame Park centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Queensbury Centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.33	£0.86	£0.00	£0.00	£0.00	£0.00	£2.22	£0.00	£0.00	£3.41
The Hyde Retail Park, Edgware Rd	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Zone 10 total	£0.00	£0.65	£0.42	£3.89	£1.48	£0.00	£8.01	£1.45	£1.44	£42.45	£1.01	£0.00	£0.32	£0.00	£15.66	£1.04	£77.81
Brent Street centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.57	£0.00	£0.00	£0.00	£0.00	£0.00	£3.23	£0.00	£3.81
Childs Hill centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.22	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.22
Golders Green centre	£0.00	£0.65	£0.00	£3.37	£0.70	£0.00	£2.44	£0.00	£0.86	£12.93	£1.01	£0.00	£0.00	£0.00	£6.23	£1.04	£29.24
Golders Green Road centre	£0.00	£0.00	£0.00	£0.52	£0.36	£0.00	£0.44	£1.45	£0.00	£25.56	£0.00	£0.00	£0.32	£0.00	£6.20	£0.00	£34.84
Temple Fortune centre	£0.00	£0.00	£0.42	£0.00	£0.42	£0.00	£4.91	£0.00	£0.00	£3.95	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£9.70
Zone 11 total	£0.00	£0.00	£0.00	£1.48	£0.28	£0.00	£0.64	£1.00	£7.61	£2.96	£9.25	£0.00	£0.00	£2.50	£3.80	£0.00	£29.51
Brent South Shopping Park, Brent Cross	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.42	£0.60	£0.00	£0.00	£5.77	£0.00	£0.00	£0.00	£3.80	£0.00	£10.59
Broadway Retail Park, Cricklewood	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Hendon Central centre	£0.00	£0.00	£0.00	£1.48	£0.28	£0.00	£0.22	£0.40	£7.61	£2.96	£3.15	£0.00	£0.00	£2.50	£0.00	£0.00	£18.59
Silkbridge Retail Park, Hendon	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Staples Corner, Geron Way, Cricklewood	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.33	£0.00	£0.00	£0.00	£0.00	£0.00	£0.33
West Hendon centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Zone 12 total	£0.27	£0.69	£0.00	£0.00	£0.54	£0.64	£0.00	£0.40	£0.45	£0.00	£2.20	£28.57	£0.00	£0.30	£0.00	£0.00	£34.05
Borehamwood centre	£0.27	£0.69	£0.00	£0.00	£0.54	£0.64	£0.00	£0.40	£0.45	£0.00	£2.20	£28.14	£0.00	£0.30	£0.00	£0.00	£33.62
Borehamwood Shopping Park	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.43	£0.00	£0.00	£0.00	£0.00	£0.43
Stirling Retail Park, Borehamwood	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Zone 13 total	£0.00	£0.78	£1.42	£0.23	£0.61	£0.35	£0.72	£0.00	£0.22	£4.10	£2.12	£0.00	£18.77	£0.00	£0.00	£0.00	£29.31
Hampden Square centre (LBB)	£0.00	£0.00	£0.00	£0.23	£0.61	£0.35	£0.30	£0.00	£0.22	£3.65	£2.12	£0.00	£0.00	£0.00	£0.00	£0.00	£7.48
Southgate centre	£0.00	£0.78	£1.42	£0.00	£0.00	£0.00	£0.42	£0.00	£0.00	£0.44	£0.00	£0.00	£18.77	£0.00	£0.00	£0.00	£21.83
Zone 14 total	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.40	£1.03	£0.00	£3.48	£0.28	£0.00	£6.13	£0.00	£0.00	£11.33
Kingsbury Centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£1.03	£0.00	£3.22	£0.00	£0.00	£0.80	£0.00	£0.00	£5.05
Stanmore Centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.40	£0.00	£0.00	£0.26	£0.28	£0.00	£5.33	£0.00	£0.00	£6.27
Zone 15 total	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£9.25	£0.00	£0.00	£0.00	£42.57	£0.00	£51.82
Cricklewood centre (LBB)	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£6.59	£0.00	£0.00	£0.00	£7.21	£0.00	£13.80
Kilburn Centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£2.20	£0.00	£0.00	£0.00	£9.34	£0.00	£11.55
Other, zone 15	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.23	£0.00	£0.00	£0.00	£0.64	£0.00	£0.87
West Hampstead Centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£13.21	£0.00	£13.21
Willesden Centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.23	£0.00	£0.00	£0.00	£12.17	£0.00	£12.40
Zone 16 total	£0.00	£0.44	£0.00	£0.13	£1.06	£3.83	£10.24	£0.22	£0.00	£15.07	£0.00	£0.20	£0.00	£0.00	£12.49	£56.98	£100.67
Hampstead Centre	£0.00	£0.00	£0.00	£0.13	£0.53	£0.00	£4.33	£0.00	£0.00	£14.77	£0.00	£0.20	£0.00	£0.00	£7.10	£8.70	£35.75
Highgate Centre	£0.00	£0.44	£0.00	£0.00	£0.00	£3.83	£4.96	£0.22	£0.00	£0.31	£0.00	£0.00	£0.00	£0.00	£5.39	£15.71	£30.85
Kentish Town Centre	£0.00	£0.00	£0.00	£0.00	£0.53	£0.00	£0.95	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£29.17	£30.65
Other, zone 16	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£3.41	£3.41
Central London total	£3.73	£15.55	£18.51	£13.34	£10.01	£16.85	£13.92	£9.80	£27.34	£14.30	£14.30	£2.53	£14.28	£9.47	£59.09	£35.85	£278.89
Central London / West End	£3.73	£15.55	£18.51	£13.34	£10.01	£16.85	£13.92	£9.80	£27.34	£14.30	£14.30	£2.53	£14.28	£9.47	£59.09	£35.85	£278.89
Outside study area	£3.08	£5.19	£5.74	£0.39	£0.67	£3.94	£0.76	£10.64	£16.08	£1.40	£16.45	£8.03	£25.60	£33.26	£23.67	£56.53	£211.42
Study area sub-total	£39.91	£42.91	£74.83	£34.83	£46.53	£66.16	£33.21	£44.29	£40.08	£69.71	£40.83	£33.61	£26.57	£17.59	£83.70	£59.07	£753.83
Outside study area sub total	**£6.80**	**£20.75**	**£24.25**	**£13.73**	**£10.68**	**£20.79**	**£14.68**	**£20.44**	**£43.42**	**£15.71**	**£30.75**	**£10.56**	**£39.88**	**£42.73**	**£82.76**	**£92.39**	**£490.31**
Grand total	**£46.72**	**£63.65**	**£99.07**	**£48.56**	**£57.21**	**£86.95**	**£47.89**	**£64.74**	**£83.50**	**£85.42**	**£71.57**	**£44.17**	**£66.46**	**£60.31**	**£166.46**	**£151.46**	**£1,244.14**

L6a - Cinema and theatre market shares in 2017

	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
Zone 2 total	12.0%	13.1%	6.6%	2.7%	5.3%	0.0%	0.0%	0.9%	8.1%	0.0%	0.0%	1.0%	3.6%	0.0%	0.0%	0.0%
Everyman, Great North Road	12.0%	13.1%	6.6%	2.7%	5.3%	0.0%	0.0%	0.9%	8.1%	0.0%	0.0%	1.0%	3.6%	0.0%	0.0%	0.0%
Zone 3 total	7.7%	11.7%	22.9%	53.4%	47.8%	11.7%	32.3%	24.1%	10.2%	33.7%	16.7%	0.0%	24.6%	10.5%	8.4%	9.7%
Vue North Finchley, Great North Leisure Park	7.7%	11.7%	22.9%	53.4%	47.8%	11.7%	32.3%	24.1%	10.2%	33.7%	16.7%	0.0%	24.6%	10.5%	8.4%	9.7%
Zone 6 total	63.4%	55.1%	48.3%	16.0%	35.1%	76.0%	41.5%	39.1%	3.7%	13.3%	1.6%	2.4%	26.0%	1.6%	8.3%	3.7%
Everyman Muswell Hill, Fortis Green Rd (LBH)	51.1%	28.3%	12.7%	0.0%	1.6%	57.3%	25.2%	10.5%	0.0%	4.0%	1.6%	0.8%	15.0%	0.9%	1.8%	2.6%
Phoenix Cinema, High Rd, East Finchley	12.3%	26.8%	35.6%	16.0%	33.5%	18.7%	16.3%	28.6%	3.7%	9.3%	0.0%	1.6%	10.9%	0.7%	6.5%	1.1%
Zone 11 total	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.1%	0.0%	8.1%	0.0%	0.0%	0.0%	0.0%	0.0%
Other, zone 11	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.1%	0.0%	8.1%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 12 total	1.2%	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%	4.0%	0.0%	0.0%	0.0%	69.1%	0.0%	2.7%	0.0%	0.0%
Reel Cinema, Metropolis Centre, Borehamwood	1.2%	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%	4.0%	0.0%	0.0%	0.0%	69.1%	0.0%	2.7%	0.0%	0.0%
Zone 15 total	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.7%	1.6%	18.6%	9.6%	0.0%	0.0%	0.9%	20.5%	1.4%
Other, zone 15	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	0.8%	0.0%	0.0%	0.0%	3.3%	1.4%
Vue, 02 Centre, Finchley Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.7%	1.6%	17.7%	8.8%	0.0%	0.0%	0.9%	17.3%	0.0%
Zone 16 total	0.0%	1.0%	0.0%	1.6%	0.8%	0.0%	7.1%	0.0%	0.0%	6.0%	0.8%	0.0%	0.0%	0.7%	31.1%	13.5%
Everyman, Haverstock Hill, Belsize Park	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	8.6%
Everyman, Holly Bush Vale, Hampstead	0.0%	0.0%	0.0%	0.7%	0.0%	0.0%	6.3%	0.0%	0.0%	2.7%	0.0%	0.0%	0.0%	0.7%	4.6%	1.4%
Odeon, 96 Finchley Rd, London	0.0%	1.0%	0.0%	0.9%	0.8%	0.0%	0.7%	0.0%	0.0%	3.3%	0.8%	0.0%	0.0%	0.0%	26.5%	3.4%
Central London total	11.6%	18.1%	14.3%	24.0%	4.1%	0.0%	7.6%	16.4%	13.6%	26.5%	12.1%	14.5%	7.8%	14.8%	6.0%	32.1%
Central London / West End	11.6%	18.1%	14.3%	24.0%	4.1%	0.0%	7.6%	16.4%	13.6%	26.5%	12.1%	14.5%	7.8%	14.8%	6.0%	32.1%
Outside study area	4.2%	1.0%	6.9%	2.2%	6.9%	12.3%	11.5%	13.8%	58.7%	1.9%	51.1%	13.1%	38.0%	68.8%	25.6%	39.5%
Study area sub-total	**84.3%**	**80.9%**	**78.9%**	**73.7%**	**89.0%**	**87.7%**	**80.9%**	**69.9%**	**27.7%**	**71.6%**	**36.8%**	**72.5%**	**54.2%**	**16.3%**	**68.4%**	**28.4%**
Outside study area sub total	**15.7%**	**19.1%**	**21.1%**	**26.3%**	**11.0%**	**12.3%**	**19.1%**	**30.1%**	**72.3%**	**28.4%**	**63.2%**	**27.5%**	**45.8%**	**83.7%**	**31.6%**	**71.6%**
Grand 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%**

L6b - Cinema and theatre turnover in 2017 (£m)

	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	Total
Zone 2 total	£1.34	£0.40	£0.30	£0.07	£0.17	£0.00	£0.00	£0.03	£0.23	£0.00	£0.00	£0.02	£0.12	£0.00	£0.00	£0.00	£2.68
Everyman, Great North Road	£1.34	£0.40	£0.30	£0.07	£0.17	£0.00	£0.00	£0.03	£0.23	£0.00	£0.00	£0.02	£0.12	£0.00	£0.00	£0.00	£2.68
Zone 3 total	£0.85	£0.36	£1.05	£1.35	£1.53	£0.58	£0.94	£0.71	£0.29	£1.75	£0.48	£0.00	£0.80	£0.25	£0.66	£0.84	£12.45
Vue North Finchley, Great North Leisure Park	£0.85	£0.36	£1.05	£1.35	£1.53	£0.58	£0.94	£0.71	£0.29	£1.75	£0.48	£0.00	£0.80	£0.25	£0.66	£0.84	£12.45
Zone 6 total	£7.05	£1.67	£2.22	£0.41	£1.12	£3.78	£1.21	£1.16	£0.11	£0.69	£0.05	£0.05	£0.85	£0.04	£0.65	£0.32	£21.36
Everyman Muswell Hill, Fortis Green Rd (LBH)	£5.69	£0.86	£0.58	£0.00	£0.05	£2.85	£0.74	£0.31	£0.00	£0.21	£0.05	£0.02	£0.49	£0.02	£0.14	£0.23	£12.22
Phoenix Cinema, High Rd, East Finchley	£1.36	£0.81	£1.64	£0.41	£1.07	£0.93	£0.47	£0.84	£0.11	£0.48	£0.00	£0.03	£0.36	£0.02	£0.51	£0.10	£9.14
Zone 11 total	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.12	£0.00	£0.23	£0.00	£0.00	£0.00	£0.00	£0.00	£0.34
Other, zone 11	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.12	£0.00	£0.23	£0.00	£0.00	£0.00	£0.00	£0.00	£0.34
Zone 12 total	£0.13	£0.00	£0.05	£0.00	£0.00	£0.00	£0.00	£0.12	£0.00	£0.00	£0.00	£1.41	£0.00	£0.06	£0.00	£0.00	£1.77
Reel Cinema, Metropolis Centre, Borehamwood	£0.13	£0.00	£0.05	£0.00	£0.00	£0.00	£0.00	£0.12	£0.00	£0.00	£0.00	£1.41	£0.00	£0.06	£0.00	£0.00	£1.77
Zone 15 total	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.05	£0.04	£0.96	£0.27	£0.00	£0.00	£0.02	£1.62	£0.13	£3.10
Other, zone 15	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.04	£0.02	£0.00	£0.00	£0.00	£0.26	£0.13	£0.45
Vue, 02 Centre, Finchley Road	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.05	£0.04	£0.92	£0.25	£0.00	£0.00	£0.02	£1.36	£0.00	£2.65
Zone 16 total	£0.00	£0.03	£0.00	£0.04	£0.03	£0.00	£0.21	£0.00	£0.00	£0.31	£0.02	£0.00	£0.00	£0.02	£2.45	£1.17	£4.27
Everyman, Haverstock Hill, Belsize Park	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.75	£0.75
Everyman, Holly Bush Vale, Hampstead	£0.00	£0.00	£0.00	£0.02	£0.00	£0.00	£0.18	£0.00	£0.00	£0.14	£0.00	£0.00	£0.00	£0.02	£0.36	£0.13	£0.85
Odeon, 96 Finchley Rd, London	£0.00	£0.03	£0.00	£0.02	£0.03	£0.00	£0.02	£0.00	£0.00	£0.17	£0.02	£0.00	£0.00	£0.00	£2.09	£0.30	£2.68
Central London total	£1.29	£0.55	£0.65	£0.61	£0.13	£0.00	£0.22	£0.48	£0.39	£1.38	£0.34	£0.30	£0.25	£0.35	£0.47	£2.79	£10.21
Central London / West End	£1.29	£0.55	£0.65	£0.61	£0.13	£0.00	£0.22	£0.48	£0.39	£1.38	£0.34	£0.30	£0.25	£0.35	£0.47	£2.79	£10.21
Outside study area	£0.46	£0.03	£0.32	£0.06	£0.22	£0.61	£0.34	£0.41	£1.67	£0.10	£1.45	£0.27	£1.24	£1.63	£2.02	£3.43	£14.25
Study area sub-total	**£9.37**	**£2.46**	**£3.62**	**£1.87**	**£2.85**	**£4.36**	**£2.36**	**£2.06**	**£0.79**	**£3.72**	**£1.05**	**£1.48**	**£1.77**	**£0.39**	**£5.38**	**£2.47**	**£45.97**
Outside study area sub total	**£1.75**	**£0.58**	**£0.97**	**£0.66**	**£0.35**	**£0.61**	**£0.56**	**£0.89**	**£2.05**	**£1.48**	**£1.80**	**£0.56**	**£1.50**	**£1.99**	**£2.49**	**£6.22**	**£24.46**
Grand total	**£11.12**	**£3.04**	**£4.59**	**£2.53**	**£3.20**	**£4.97**	**£2.91**	**£2.95**	**£2.84**	**£5.20**	**£2.84**	**£2.04**	**£3.27**	**£2.37**	**£7.87**	**£8.69**	**£70.42**

L7a - Health and fitness market shares in 2017

	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
Zone 1 total	33.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.4%	0.0%	0.0%
Other, zone 1	33.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.4%	0.0%	0.0%
Zone 2 total	6.3%	22.0%	6.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other, zone 2	6.3%	22.0%	6.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 3 total	33.6%	43.5%	59.8%	15.0%	42.9%	18.6%	17.4%	30.9%	9.1%	4.5%	7.1%	18.2%	25.4%	9.0%	3.7%	3.5%
David Lloyd, Leisure Way, High Road, Finchley	6.3%	0.0%	14.7%	10.6%	20.1%	3.4%	7.1%	0.0%	0.0%	4.5%	0.0%	0.0%	4.0%	0.0%	0.0%	0.0%
Great North Leisure Park, Chaplin House, Finchley	4.2%	3.3%	28.2%	0.0%	14.6%	0.0%	2.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Nuffield Health Fitness & Wellbeing Gym, Princess Park Manor	0.0%	0.0%	6.7%	0.0%	3.7%	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.5%	0.0%	3.7%	3.5%
Other, zone 3	0.0%	0.0%	10.2%	4.4%	0.0%	3.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.3%	0.0%	0.0%	0.0%
Pumping Iron Gym, Oakleigh Rd S	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
PureGym, Tally Ho Corner, High Road	23.1%	40.1%	0.0%	0.0%	4.4%	10.5%	8.4%	30.9%	9.1%	0.0%	7.1%	18.2%	15.5%	9.0%	0.0%	0.0%
Zone 4 total	0.0%	18.2%	0.0%	27.3%	8.3%	0.0%	3.8%	3.2%	12.0%	10.4%	10.0%	0.0%	0.0%	0.0%	11.7%	0.0%
Barnet Copthall Leisure Centre, Champions Way	0.0%	14.8%	0.0%	3.1%	0.0%	0.0%	3.8%	3.2%	4.5%	3.4%	0.0%	0.0%	0.0%	0.0%	11.7%	0.0%
Virgin Active, Langstone Way, Mill Hill	0.0%	3.3%	0.0%	24.2%	8.3%	0.0%	0.0%	0.0%	7.5%	7.0%	10.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 5 total	6.3%	0.0%	4.5%	11.4%	15.8%	13.0%	2.5%	0.0%	9.1%	0.0%	1.5%	0.0%	14.5%	0.0%	0.0%	3.5%
Other, zone 5	6.3%	0.0%	0.0%	0.0%	7.0%	0.0%	0.0%	0.0%	9.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Park View Health Clubs, Ballards Ln	0.0%	0.0%	4.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	14.5%	0.0%	0.0%	0.0%
PureGym, East End Road, Finchley	0.0%	0.0%	0.0%	11.4%	6.6%	0.0%	2.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
The Gym Group, East End Rd	0.0%	0.0%	0.0%	0.0%	2.2%	13.0%	0.0%	0.0%	0.0%	0.0%	1.5%	0.0%	0.0%	0.0%	0.0%	3.5%
Zone 6 total	0.0%	2.2%	25.5%	6.0%	7.2%	57.4%	11.9%	13.3%	2.4%	5.6%	0.0%	0.0%	0.0%	0.0%	0.0%	7.1%
Other, zone 6	0.0%	0.0%	0.0%	0.0%	1.7%	31.6%	0.0%	0.0%	0.0%	1.8%	0.0%	0.0%	0.0%	0.0%	0.0%	7.1%
The Laboratory Spa & Health Club, The Avenue, Muswell Hill (LBH)	0.0%	2.2%	4.5%	6.0%	0.0%	14.4%	0.0%	13.3%	2.4%	3.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
The Manor Health and Leisure, Fortis Green, Muswell Hill (LBH)	0.0%	0.0%	21.0%	0.0%	5.5%	11.3%	11.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 7 total	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other, zone 7	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 8 total	0.0%	3.3%	0.0%	17.0%	5.0%	0.0%	0.0%	13.3%	0.0%	0.0%	1.5%	0.0%	0.0%	1.1%	0.0%	0.0%
Other, zone 8	0.0%	3.3%	0.0%	17.0%	5.0%	0.0%	0.0%	13.3%	0.0%	0.0%	1.5%	0.0%	0.0%	1.1%	0.0%	0.0%
Zone 9 total	0.0%	0.0%	0.0%	12.0%	0.0%	0.0%	0.0%	12.4%	32.7%	0.0%	2.3%	0.0%	0.0%	35.9%	0.0%	0.0%
Barnet Burnt Oak Leisure Centre, Watling Avenue, Edgware	0.0%	0.0%	0.0%	12.0%	0.0%	0.0%	0.0%	3.2%	2.7%	0.0%	2.3%	0.0%	0.0%	9.0%	0.0%	0.0%
The Gym Zenith House, Edgware Rd, London	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	9.2%	29.9%	0.0%	0.0%	0.0%	0.0%	26.9%	0.0%	0.0%
Zone 10 total	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	7.8%	0.0%	0.0%	44.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
LA Fitness Golders Green, Golders Green Rd, Golders Green, London	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	7.8%	0.0%	0.0%	44.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Mr Fitta Gym, Sentinel Square, London	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 11 total	0.0%	0.0%	0.0%	0.0%	0.0%	1.7%	0.0%	0.0%	0.0%	0.0%	6.0%	0.0%	0.0%	0.0%	11.7%	0.0%
The Manor Health Club, Cricklewood Broadway, Cricklewood	0.0%	0.0%	0.0%	0.0%	0.0%	1.7%	0.0%	0.0%	0.0%	0.0%	6.0%	0.0%	0.0%	0.0%	11.7%	0.0%
Zone 12 total	0.0%	1.8%	0.0%	0.0%	0.0%	0.0%	0.0%	4.0%	0.0%	0.0%	12.3%	81.8%	0.0%	2.0%	0.0%	0.0%
Borehamwood	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.0%	0.0%	0.0%	2.3%	49.3%	0.0%	2.0%	0.0%	0.0%
The Venue Leisure Centre, Elstree Way, Borehamwood	0.0%	1.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	10.0%	32.5%	0.0%	0.0%	0.0%	0.0%
Zone 13 total	0.0%	1.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	40.0%	0.0%	0.0%	0.0%
Other, zone 13	0.0%	1.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.8%	0.0%	0.0%	0.0%
Southgate Leisure Centre, Winchmore Hill Road, Southgate	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	38.2%	0.0%	0.0%	0.0%
Zone 14 total	0.0%	0.0%	0.0%	1.3%	0.0%	0.0%	0.0%	18.9%	2.0%	0.0%	1.2%	0.0%	0.0%	4.2%	0.0%	0.0%
Aspire Leisure Centre, Wood Lane, Stanmore	0.0%	0.0%	0.0%	1.3%	0.0%	0.0%	0.0%	18.9%	0.0%	0.0%	0.0%	0.0%	0.0%	4.2%	0.0%	0.0%
Other, zone 14	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.0%	0.0%	1.2%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 15 total	0.0%	0.0%	0.0%	5.6%	20.7%	0.0%	42.8%	0.0%	6.4%	8.6%	9.8%	0.0%	0.0%	0.0%	70.4%	5.6%
Other, zone 15	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.3%	7.1%	0.0%	0.0%	0.0%	29.1%	0.0%
Swiss Cottage Leisure Centre, Adelaide Road, Camden Town	0.0%	0.0%	0.0%	1.7%	0.0%	0.0%	0.0%	0.0%	0.0%	1.8%	0.0%	0.0%	0.0%	0.0%	2.5%	5.6%
Virgin Active Cricklewood, Cricklewood Ln (LBB)	0.0%	0.0%	0.0%	3.9%	20.7%	0.0%	42.8%	0.0%	6.4%	4.5%	2.7%	0.0%	0.0%	0.0%	38.8%	0.0%
Zone 16 total	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.5%	0.0%	0.0%	1.8%	0.0%	0.0%	0.0%	0.0%	0.0%	36.1%
Other, zone 16	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.5%	0.0%	0.0%	1.8%	0.0%	0.0%	0.0%	0.0%	0.0%	36.1%
Central London total	4.2%	0.0%	0.0%	0.0%	0.0%	0.0%	4.0%	0.0%	0.0%	3.4%	0.0%	0.0%	0.0%	0.0%	0.0%	2.8%
Central London	4.2%	0.0%	0.0%	0.0%	0.0%	0.0%	4.0%	0.0%	0.0%	3.4%	0.0%	0.0%	0.0%	0.0%	0.0%	2.8%
Outside study area	16.0%	7.3%	3.5%	4.3%	0.0%	9.3%	2.0%	4.0%	26.4%	21.5%	48.4%	0.0%	20.2%	46.4%	2.5%	41.3%
Study area sub-total	79.8%	92.7%	96.5%	95.7%	100.0%	90.7%	94.0%	96.0%	73.6%	75.1%	51.6%	100.0%	79.8%	53.6%	97.5%	55.9%
Outside study area sub total	20.2%	7.3%	3.5%	4.3%	0.0%	9.3%	6.0%	4.0%	26.4%	24.9%	48.4%	0.0%	20.2%	46.4%	2.5%	44.1%
Grand 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%**

L7b - Health and fitness turnover in 2017 (£m)

	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	Total
Zone 1 total	£2.09	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.12	£0.00	£0.00	£2.20
Other, zone 1	£2.09	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.12	£0.00	£0.00	£2.20
Zone 2 total	£0.39	£1.91	£0.87	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£3.17
Other, zone 2	£0.39	£1.91	£0.87	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£3.17
Zone 3 total	£2.09	£3.78	£7.75	£1.04	£3.43	£2.30	£1.27	£2.71	£0.87	£0.58	£0.66	£0.71	£2.32	£0.77	£0.70	£0.74	£31.72
David Lloyd, Leisure Way, High Road, Finchley	£0.39	£0.00	£1.90	£0.73	£1.61	£0.42	£0.52	£0.00	£0.00	£0.58	£0.00	£0.00	£0.36	£0.00	£0.00	£0.00	£6.52
Great North Leisure Park, Chaplin House, Finchley	£0.26	£0.29	£3.64	£0.00	£1.17	£0.00	£0.15	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£5.51
Nuffield Health Fitness & Wellbeing Gym, Princess Park Manor	£0.00	£0.00	£0.87	£0.00	£0.30	£0.17	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.32	£0.00	£0.70	£0.74	£3.10
Other, zone 3	£0.00	£0.00	£1.33	£0.31	£0.00	£0.42	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.21	£0.00	£0.00	£0.00	£2.26
Pumping Iron Gym, Oakleigh Rd S	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
PureGym, Tally Ho Corner, High Road	£1.44	£3.49	£0.00	£0.00	£0.35	£1.30	£0.61	£2.71	£0.87	£0.00	£0.66	£0.71	£1.42	£0.77	£0.00	£0.00	£14.32
Zone 4 total	£0.00	£1.58	£0.00	£1.89	£0.67	£0.00	£0.28	£0.28	£1.15	£1.33	£0.93	£0.00	£0.00	£0.00	£2.20	£0.00	£10.29
Barnet Copthall Leisure Centre, Champions Way	£0.00	£1.29	£0.00	£0.21	£0.00	£0.00	£0.28	£0.28	£0.43	£0.44	£0.00	£0.00	£0.00	£0.00	£2.20	£0.00	£5.12
Virgin Active, Langstone Way, Mill Hill	£0.00	£0.29	£0.00	£1.68	£0.67	£0.00	£0.00	£0.00	£0.72	£0.89	£0.93	£0.00	£0.00	£0.00	£0.00	£0.00	£5.17
Zone 5 total	£0.39	£0.00	£0.58	£0.79	£1.27	£1.60	£0.18	£0.00	£0.87	£0.00	£0.14	£0.00	£1.33	£0.00	£0.00	£0.74	£7.89
Other, zone 5	£0.39	£0.00	£0.00	£0.00	£0.56	£0.00	£0.00	£0.00	£0.87	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£1.83
Park View Health Clubs, Ballards Ln	£0.00	£0.00	£0.58	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£1.33	£0.00	£0.00	£0.00	£1.90
PureGym, East End Road, Finchley	£0.00	£0.00	£0.00	£0.79	£0.53	£0.00	£0.18	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£1.50
The Gym Group, East End Rd	£0.00	£0.00	£0.00	£0.00	£0.18	£1.60	£0.00	£0.00	£0.00	£0.00	£0.14	£0.00	£0.00	£0.00	£0.00	£0.74	£2.66
Zone 6 total	£0.00	£0.19	£3.30	£0.42	£0.58	£7.07	£0.87	£1.16	£0.23	£0.72	£0.00	£0.00	£0.00	£0.00	£0.00	£1.48	£16.03
Other, zone 6	£0.00	£0.00	£0.00	£0.00	£0.14	£3.90	£0.00	£0.00	£0.00	£0.23	£0.00	£0.00	£0.00	£0.00	£0.00	£1.48	£5.75
The Laboratory Spa & Health Club, The Avenue, Muswell Hill (LBH)	£0.00	£0.19	£0.58	£0.42	£0.00	£1.78	£0.00	£1.16	£0.23	£0.49	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£4.86
The Manor Health and Leisure, Fortis Green, Muswell Hill (LBH)	£0.00	£0.00	£2.72	£0.00	£0.44	£1.39	£0.87	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£5.42
Zone 7 total	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.37	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.37
Other, zone 7	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.37	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.37
Zone 8 total	£0.00	£0.29	£0.00	£1.18	£0.40	£0.00	£0.00	£1.16	£0.00	£0.00	£0.14	£0.00	£0.00	£0.09	£0.00	£0.00	£3.27
Other, zone 8	£0.00	£0.29	£0.00	£1.18	£0.40	£0.00	£0.00	£1.16	£0.00	£0.00	£0.14	£0.00	£0.00	£0.09	£0.00	£0.00	£3.27
Zone 9 total	£0.00	£0.00	£0.00	£0.83	£0.00	£0.00	£0.00	£1.09	£3.14	£0.00	£0.21	£0.00	£0.00	£3.05	£0.00	£0.00	£8.32
Barnet Burnt Oak Leisure Centre, Watling Avenue, Edgware	£0.00	£0.00	£0.00	£0.83	£0.00	£0.00	£0.00	£0.28	£0.26	£0.00	£0.21	£0.00	£0.00	£0.77	£0.00	£0.00	£2.35
The Gym Zenith House, Edgware Rd, London	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.81	£2.88	£0.00	£0.00	£0.00	£0.00	£2.29	£0.00	£0.00	£5.97
Zone 10 total	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.57	£0.00	£0.00	£5.67	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£6.24
LA Fitness Golders Green, Golders Green Rd, Golders Green, London	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.57	£0.00	£0.00	£5.67	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£6.24
Mr Fitta Gym, Sentinel Square, London	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Zone 11 total	£0.00	£0.00	£0.00	£0.00	£0.00	£0.21	£0.00	£0.00	£0.00	£0.00	£0.56	£0.00	£0.00	£0.00	£2.20	£0.00	£2.96
The Manor Health Club, Cricklewood Broadway, Cricklewood	£0.00	£0.00	£0.00	£0.00	£0.00	£0.21	£0.00	£0.00	£0.00	£0.00	£0.56	£0.00	£0.00	£0.00	£2.20	£0.00	£2.96
Zone 12 total	£0.00	£0.15	£0.00	£0.00	£0.00	£0.00	£0.00	£0.35	£0.00	£0.00	£1.14	£3.21	£0.00	£0.17	£0.00	£0.00	£5.03
Borehamwood	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.35	£0.00	£0.00	£0.21	£1.93	£0.00	£0.17	£0.00	£0.00	£2.67
The Venue Leisure Centre, Elstree Way, Borehamwood	£0.00	£0.15	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.93	£1.28	£0.00	£0.00	£0.00	£0.00	£2.36
Zone 13 total	£0.00	£0.15	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£3.67	£0.00	£0.00	£0.00	£3.82
Other, zone 13	£0.00	£0.15	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.17	£0.00	£0.00	£0.00	£0.32
Southgate Leisure Centre, Winchmore Hill Road, Southgate	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£3.50	£0.00	£0.00	£0.00	£3.50
Zone 14 total	£0.00	£0.00	£0.00	£0.09	£0.00	£0.00	£0.00	£1.66	£0.20	£0.00	£0.11	£0.00	£0.00	£0.36	£0.00	£0.00	£2.41
Aspire Leisure Centre, Wood Lane, Stanmore	£0.00	£0.00	£0.00	£0.09	£0.00	£0.00	£0.00	£1.66	£0.00	£0.00	£0.00	£0.00	£0.00	£0.36	£0.00	£0.00	£2.11
Other, zone 14	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.20	£0.00	£0.11	£0.00	£0.00	£0.00	£0.00	£0.00	£0.31
Zone 15 total	£0.00	£0.00	£0.00	£0.39	£1.66	£0.00	£3.12	£0.00	£0.61	£1.10	£0.91	£0.00	£0.00	£0.00	£13.21	£1.17	£22.17
Other, zone 15	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.29	£0.66	£0.00	£0.00	£0.00	£5.45	£0.00	£6.40
Swiss Cottage Leisure Centre, Adelaide Road, Camden Town	£0.00	£0.00	£0.00	£0.12	£0.00	£0.00	£0.00	£0.00	£0.00	£0.23	£0.00	£0.00	£0.00	£0.00	£0.47	£1.17	£1.99
Virgin Active Cricklewood, Cricklewood Ln (LBB)	£0.00	£0.00	£0.00	£0.27	£1.66	£0.00	£3.12	£0.00	£0.61	£0.58	£0.25	£0.00	£0.00	£0.00	£7.29	£0.00	£13.79
Zone 16 total	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.18	£0.00	£0.00	£0.23	£0.00	£0.00	£0.00	£0.00	£0.00	£7.57	£7.98
Other, zone 16	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.18	£0.00	£0.00	£0.23	£0.00	£0.00	£0.00	£0.00	£0.00	£7.57	£7.98
Central London total	£0.26	£0.00	£0.00	£0.00	£0.00	£0.00	£0.29	£0.00	£0.00	£0.44	£0.00	£0.00	£0.00	£0.00	£0.00	£0.59	£1.57
Central London	£0.26	£0.00	£0.00	£0.00	£0.00	£0.00	£0.29	£0.00	£0.00	£0.44	£0.00	£0.00	£0.00	£0.00	£0.00	£0.59	£1.57
Outside study area total	£0.99	£0.64	£0.46	£0.30	£0.00	£1.15	£0.15	£0.35	£2.53	£2.75	£4.49	£0.00	£1.85	£3.94	£0.47	£8.66	£28.72
Study area sub-total	£4.97	£8.06	£12.49	£6.62	£8.01	£11.18	£6.84	£8.41	£7.07	£9.62	£4.80	£3.92	£7.31	£4.56	£18.31	£11.71	£133.89
Outside study area sub total	£1.26	£0.64	£0.46	£0.30	£0.00	£1.15	£0.44	£0.35	£2.53	£3.18	£4.49	£0.00	£1.85	£3.94	£0.47	£9.25	£30.30
Grand total	**£6.22**	**£8.70**	**£12.95**	**£6.92**	**£8.01**	**£12.32**	**£7.28**	**£8.77**	**£9.60**	**£12.81**	**£9.29**	**£3.92**	**£9.16**	**£8.50**	**£18.77**	**£20.96**	**£164.18**

L8a - Family entertainment market shares in 2017

	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
Zone 1 total	0.0%	2.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Chipping Barnet centre	0.0%	2.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 2 total	0.0%	2.6%	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%
East Barnet Village centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
New Barnet centre	0.0%	2.6%	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%
Other, zone 2	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 3 total	52.2%	41.4%	83.2%	50.3%	57.0%	54.6%	65.5%	89.2%	37.1%	81.8%	25.7%	2.7%	40.1%	3.8%	26.7%	29.8%
Friern Barnet centre	0.0%	0.0%	0.0%	3.5%	0.0%	11.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Friern Bridge Retail Park, Friern Bridge	0.0%	0.0%	0.0%	0.0%	2.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.3%	0.0%	0.0%	0.0%
Great North Leisure Park, North Finchley	0.0%	2.6%	2.9%	40.7%	25.6%	2.4%	6.1%	62.2%	11.7%	51.4%	7.0%	0.0%	5.7%	0.0%	0.0%	0.0%
Great North Road centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
New Southgate centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
North Finchley centre	52.2%	38.8%	80.3%	6.1%	28.9%	40.7%	59.4%	27.0%	25.4%	30.4%	18.7%	2.7%	32.1%	3.8%	26.7%	29.8%
Other, zone 3	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Whetstone centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 4 total	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Holders Hill Circus centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Mill Hill centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 5 total	31.1%	0.0%	0.0%	0.0%	5.0%	2.4%	0.0%	0.0%	2.1%	0.0%	13.3%	12.5%	0.0%	0.0%	0.0%	0.0%
Church End, Finchley centre	31.1%	0.0%	0.0%	0.0%	5.0%	2.4%	0.0%	0.0%	2.1%	0.0%	13.3%	12.5%	0.0%	0.0%	0.0%	0.0%
Zone 6 total	0.0%	15.0%	0.0%	3.5%	16.1%	33.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	10.7%	0.0%	22.1%	0.0%
Colney Hatch Lane centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
East Finchley centre	0.0%	12.4%	0.0%	3.5%	16.1%	18.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	10.7%	0.0%	0.0%	0.0%
Muswell Hill centre (LBH)	0.0%	2.6%	0.0%	0.0%	0.0%	14.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	22.1%	0.0%
Zone 8 total	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	12.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Apex Corner centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Deansbrook Road centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Edgware centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	12.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Hale Lane centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 9 total	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Burnt Oak centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Colindale – The Hyde centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Grahame Park centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Queensbury Centre (LBBr)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
The Hyde Retail Park, Edgware Rd (Colindale Retail Park)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 10 total	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Brent Street centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Childs Hill centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Golders Green centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Golders Green Road centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Temple Fortune centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 11 total	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	6.1%	0.0%	0.0%	0.0%	11.3%	0.0%	1.8%	11.9%	0.0%	0.0%
Brent South Shopping Park, Brent Cross	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	11.3%	0.0%	0.0%	11.9%	0.0%	0.0%
Broadway Retail Park, Cricklewood	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Hendon Central centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.8%	0.0%	0.0%	0.0%
Silkbridge Retail Park, Hendon	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Staples Corner, Geron Way, Cricklewood	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	6.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
West Hendon centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 12 total	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	13.7%	0.0%	0.0%	25.0%	0.0%	0.0%	0.0%	0.0%
Borehamwood centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	13.7%	0.0%	0.0%	25.0%	0.0%	0.0%	0.0%	0.0%
Borehamwood Shopping Park	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Stirling Retail Park, Borehamwood	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 13 total	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	10.7%	0.0%	0.0%	0.0%
Hampden Square centre (LBB)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Southgate centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	10.7%	0.0%	0.0%	0.0%
Zone 14 total	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.1%	0.0%	0.0%	0.0%	0.0%	27.6%	0.0%	0.0%
Kingsbury Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Stanmore Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.1%	0.0%	0.0%	0.0%	0.0%	27.6%	0.0%	0.0%
Zone 15 total	0.0%	0.0%	0.0%	2.4%	2.5%	0.0%	0.0%	0.0%	0.0%	1.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Cricklewood centre (LBB)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Kilburn Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other, zone 15	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
West Hampstead Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Willesden Centre	0.0%	0.0%	0.0%	2.4%	2.5%	0.0%	0.0%	0.0%	0.0%	1.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 16 total	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	7.8%
Hampstead Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Highgate Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Kentish Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	7.8%
Other, zone 16	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Central London total	16.7%	34.2%	13.2%	41.9%	19.3%	7.5%	28.5%	7.7%	0.0%	1.9%	28.1%	7.4%	10.7%	19.4%	24.5%	62.4%
Central London / West End	16.7%	34.2%	13.2%	41.9%	19.3%	7.5%	28.5%	7.7%	0.0%	1.9%	28.1%	7.4%	10.7%	19.4%	24.5%	62.4%
Outside study area	0.0%	4.7%	3.7%	1.8%	0.0%	2.4%	0.0%	3.1%	45.1%	0.0%	19.6%	52.4%	25.9%	37.2%	26.8%	0.0%
Study area sub-total	83.3%	61.1%	83.2%	56.2%	80.7%	90.0%	71.5%	89.2%	54.9%	98.1%	52.3%	40.2%	63.4%	43.4%	48.8%	37.6%
Outside study area sub total	16.7%	38.9%	16.8%	43.8%	19.3%	10.0%	28.5%	10.8%	45.1%	1.9%	47.7%	59.8%	36.6%	56.6%	51.2%	62.4%
Grand 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%

L8b - Family entertainment turnover in 2017 (£m)

	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	Total
Zone 1 total	£0.00	£0.02	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.02
Chipping Barnet centre	£0.00	£0.02	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.02
Zone 2 total	£0.00	£0.03	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.02	£0.00	£0.00	£0.00	£0.00	£0.00	£0.05
East Barnet Village centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
New Barnet centre	£0.00	£0.03	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.02	£0.00	£0.00	£0.00	£0.00	£0.00	£0.05
Other, zone 2	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Zone 3 total	£0.36	£0.40	£1.20	£0.39	£0.51	£0.75	£0.53	£0.87	£0.40	£1.16	£0.27	£0.01	£0.41	£0.04	£0.56	£0.69	£8.53
Friern Barnet centre	£0.00	£0.00	£0.00	£0.03	£0.00	£0.16	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.18
Friern Bridge Retail Park, Friern Bridge	£0.00	£0.00	£0.00	£0.00	£0.02	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.02	£0.00	£0.00	£0.00	£0.05
Great North Leisure Park, North Finchley	£0.00	£0.03	£0.04	£0.31	£0.23	£0.03	£0.05	£0.61	£0.12	£0.73	£0.07	£0.00	£0.06	£0.00	£0.00	£0.00	£2.28
Great North Road centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
New Southgate centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
North Finchley centre	£0.36	£0.37	£1.15	£0.05	£0.26	£0.56	£0.48	£0.26	£0.27	£0.43	£0.19	£0.01	£0.33	£0.04	£0.56	£0.69	£6.02
Other, zone 3	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Whetstone centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Zone 4 total	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.03	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.03
Holders Hill Circus centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Mill Hill centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.03	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.03
Zone 5 total	£0.21	£0.00	£0.00	£0.00	£0.04	£0.03	£0.00	£0.00	£0.02	£0.00	£0.14	£0.05	£0.00	£0.00	£0.00	£0.00	£0.51
Church End, Finchley centre	£0.21	£0.00	£0.00	£0.00	£0.04	£0.03	£0.00	£0.00	£0.02	£0.00	£0.14	£0.05	£0.00	£0.00	£0.00	£0.00	£0.51
Zone 6 total	£0.00	£0.15	£0.00	£0.03	£0.14	£0.45	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.11	£0.00	£0.46	£0.00	£1.34
Colney Hatch Lane centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
East Finchley centre	£0.00	£0.12	£0.00	£0.03	£0.14	£0.26	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.11	£0.00	£0.00	£0.00	£0.66
Muswell Hill centre (LBH)	£0.00	£0.03	£0.00	£0.00	£0.00	£0.19	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.46	£0.00	£0.68
Zone 8 total	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.18	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.18
Apex Corner centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Deansbrook Road centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Edgware centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.18	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.18
Hale Lane centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Zone 9 total	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Burnt Oak centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Colindale – The Hyde centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Grahame Park centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Queensbury Centre (LBBr)	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
The Hyde Retail Park, Edgware Rd (Colindale Retail Park)	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Zone 10 total	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Brent Street centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Childs Hill centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Golders Green centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Golders Green Road centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Temple Fortune centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Zone 11 total	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.05	£0.00	£0.00	£0.00	£0.12	£0.00	£0.02	£0.11	£0.00	£0.00	£0.30
Brent South Shopping Park, Brent Cross	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.12	£0.00	£0.00	£0.11	£0.00	£0.00	£0.23
Broadway Retail Park, Cricklewood	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Hendon Central centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.02	£0.00	£0.00	£0.00	£0.02
Silkbridge Retail Park, Hendon	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Staples Corner, Geron Way, Cricklewood	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.05	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.05
West Hendon centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Zone 12 total	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.15	£0.00	£0.00	£0.11	£0.00	£0.00	£0.00	£0.00	£0.25
Borehamwood centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.15	£0.00	£0.00	£0.11	£0.00	£0.00	£0.00	£0.00	£0.25
Borehamwood Shopping Park	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Stirling Retail Park, Borehamwood	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Zone 13 total	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.11	£0.00	£0.00	£0.00	£0.11
Hampden Square centre (LBB)	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Southgate centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.11	£0.00	£0.00	£0.00	£0.11
Zone 14 total	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.02	£0.00	£0.00	£0.00	£0.00	£0.26	£0.00	£0.00	£0.28
Kingsbury Centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Stanmore Centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.02	£0.00	£0.00	£0.00	£0.00	£0.26	£0.00	£0.00	£0.28
Zone 15 total	£0.00	£0.00	£0.00	£0.02	£0.02	£0.00	£0.00	£0.00	£0.00	£0.03	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.07
Cricklewood centre (LBB)	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Kilburn Centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Other, zone 15	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
West Hampstead Centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Willesden Centre	£0.00	£0.00	£0.00	£0.02	£0.02	£0.00	£0.00	£0.00	£0.00	£0.03	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.07
Zone 16 total	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.18	£0.18
Hampstead Centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Highgate Centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Kentish Town Centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.18	£0.18
Other, zone 16	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Central London total	£0.12	£0.33	£0.19	£0.32	£0.17	£0.10	£0.23	£0.08	£0.00	£0.03	£0.29	£0.03	£0.11	£0.18	£0.51	£1.45	£4.14
Central London / West End	£0.12	£0.33	£0.19	£0.32	£0.17	£0.10	£0.23	£0.08	£0.00	£0.03	£0.29	£0.03	£0.11	£0.18	£0.51	£1.45	£4.14
Outside study area	£0.00	£0.05	£0.05	£0.01	£0.00	£0.03	£0.00	£0.03	£0.48	£0.00	£0.20	£0.23	£0.26	£0.35	£0.56	£0.00	£2.26
Study area sub-total	**£0.58**	**£0.59**	**£1.20**	**£0.41**	**£0.70**	**£1.23**	**£0.58**	**£0.87**	**£0.59**	**£1.37**	**£0.54**	**£0.18**	**£0.65**	**£0.41**	**£1.02**	**£0.88**	**£11.77**
Outside study area sub total	**£0.12**	**£0.38**	**£0.24**	**£0.34**	**£0.17**	**£0.14**	**£0.23**	**£0.11**	**£0.48**	**£0.03**	**£0.49**	**£0.26**	**£0.37**	**£0.53**	**£1.07**	**£1.45**	**£6.41**
Grand total	**£0.69**	**£0.97**	**£1.44**	**£0.75**	**£0.87**	**£1.37**	**£0.81**	**£0.97**	**£1.07**	**£1.40**	**£1.03**	**£0.44**	**£1.02**	**£0.94**	**£2.09**	**£2.33**	**£18.18**

L9a - Bingo market shares in 2017

	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
Zone 12 total	-	0.0%	0.0%	0.0%	-	-	-	72.4%	0.0%	-	5.9%	100.0%	0.0%	-	0.0%	0.0%
Gala Bingo, The Point, Shenley Rd, Borehamwood	-	0.0%	0.0%	0.0%	-	-	-	72.4%	0.0%	-	5.9%	100.0%	0.0%	-	0.0%	0.0%
Zone 16 total	-	51.2%	0.0%	0.0%	-	-	-	27.6%	100.0%	-	94.1%	0.0%	0.0%	-	100.0%	0.0%
Beacon Bingo, Cricklewood Broadway, Cricklewood, London	-	51.2%	0.0%	0.0%	-	-	-	27.6%	100.0%	-	94.1%	0.0%	0.0%	-	100.0%	0.0%
Outside study area total	-	48.8%	100.0%	100.0%	-	-	-	0.0%	0.0%	-	0.0%	0.0%	100.0%	-	0.0%	100.0%
Mecca Wood Green, Lordship Ln, Wood Green, London	-	0.0%	0.0%	0.0%	-	-	-	0.0%	0.0%	-	0.0%	0.0%	0.0%	-	0.0%	0.0%
Other, outside area	-	48.8%	100.0%	100.0%	-	-	-	0.0%	0.0%	-	0.0%	0.0%	100.0%	-	0.0%	100.0%
Study area sub-total	-	51.2%	0.0%	0.0%	-	-	-	100.0%	100.0%	-	100.0%	100.0%	0.0%	-	100.0%	0.0%
Outside study area sub total	-	48.8%	100.0%	100.0%	-	-	-	0.0%	0.0%	-	0.0%	0.0%	100.0%	-	0.0%	100.0%
Grand total	**-**	**100.0%**	**100.0%**	**100.0%**	**-**	**-**	**-**	**100.0%**	**100.0%**	**-**	**100.0%**	**100.0%**	**100.0%**	**-**	**100.0%**	**100.0%**

L9b - Bingo turnover in 2017 (£m)

	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	Total
Zone 12 total	-	£0.00	£0.00	£0.00	-	-	-	£7.05	£0.00	-	£0.60	£4.36	£0.00	-	£0.00	£0.00	£12.02
Gala Bingo, The Point, Shenley Rd, Borehamwood	-	£0.00	£0.00	£0.00	-	-	-	£7.05	£0.00	-	£0.60	£4.36	£0.00	-	£0.00	£0.00	£12.02
Zone 16 total	-	£4.95	£0.00	£0.00	-	-	-	£2.69	£10.67	-	£9.72	£0.00	£0.00	-	£20.86	£0.00	£48.89
Beacon Bingo, Cricklewood Broadway, Cricklewood, London	-	£4.95	£0.00	£0.00	-	-	-	£2.69	£10.67	-	£9.72	£0.00	£0.00	-	£20.86	£0.00	£48.89
Outside study area total	-	£4.71	£14.38	£7.69	-	-	-	£0.00	£0.00	-	£0.00	£0.00	£10.18	-	£0.00	£23.28	£60.25
Mecca Wood Green, Lordship Ln, Wood Green, London	-	£0.00	£0.00	£0.00	-	-	-	£0.00	£0.00	-	£0.00	£0.00	£0.00	-	£0.00	£0.00	£0.00
Other, outside area	-	£4.71	£14.38	£7.69	-	-	-	£0.00	£0.00	-	£0.00	£0.00	£10.18	-	£0.00	£23.28	£60.25
Study area sub-total	-	£4.95	£0.00	£0.00	-	-	-	£9.74	£10.67	-	£10.32	£4.36	£0.00	-	£20.86	£0.00	£60.90
Outside study area sub total	-	£4.71	£14.38	£7.69	-	-	-	£0.00	£0.00	-	£0.00	£0.00	£10.18	-	£0.00	£23.28	£60.25
Grand total	**£0.00**	**£9.66**	**£14.38**	**£7.69**	**£0.00**	**£0.00**	**£0.00**	**£9.74**	**£10.67**	**£0.00**	**£10.32**	**£4.36**	**£10.18**	**£0.00**	**£20.86**	**£23.28**	**£121.15**

L10 - Food and drink capacity

		2017	2021	2026	2031	2036
Available expenditure						
A	Total expenditure (£m)	£1,244	£1,327	£1,494	£1,676	£1,876
B	Market share of study area (%)	39%	39%	39%	39%	39%
C	Retained expenditure (£m)	£480.35	£512.40	£576.92	£647.02	£724.21
D	Inflow expenditure (£m)	£59.23	£63.19	£71.14	£79.79	£89.31
E	Inflow proportion (%)	12%	12%	12%	12%	12%
F	Total available expenditure (£)	£540	£576	£648	£727	£814
Claims on expenditure						
G	Turnover of existing floorspace (£m)	540	548	559	571	580
Quantitative need						
H	Expenditure capacity (£m)	£0.00	£27.32	£88.75	£156.21	£233.74
I	Assumed sales density (£ per sqm gross)	£6,500	£6,631	£6,765	£6,901	£7,012
J	Gross quantitative need (sqm)	0	4,120	13,119	22,635	33,333

Notes

Source: Exerpian 2016 for total leisure expenditure and NEMS 2017

Assumptions: 0.4% Sales density growth rate per annum applied after 2017

L11 - Food and drink capacity for selecetd centres

	2017	2021	2026	2031	2036
LBB floorspace need (sqm gross)	**0**	**4,120**	**13,119**	**22,635**	**33,333**
North Finchley district centre	0	313	997	1,720	2,533
Whetstone district centre	0	257	819	1,413	2,080
Edgware major centre	0	204	650	1,122	1,652
Finchley Church End district centre	0	225	717	1,237	1,821
Mill Hill district centre	0	186	592	1,022	1,504
Chipping Barnet district centre	0	202	642	1,107	1,631
Golders Green district centre	0	120	382	658	970
East Finchley district centre	0	141	448	773	1,138
Hendon Central district centre	0	88	279	482	710
Cricklewood district centre	0	36	114	197	291
Colindale district centre	0	63	200	345	508
New Barnet district centre	0	54	171	295	434
Temple Fortune district centre	0	53	169	291	428
Brent Steet district centre	0	3	10	17	25
Burnt Oak district centre	0	0	0	0	0

L12 - Cinema capacity

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

Notes

Source: Exerpian MMG for population