GVA Grimley

LONDON BOROUGH OF BARNET

Town Centres Floorspace Needs Assessment
Retail Capacity Update

July 2010

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PLANS

APPENDICES

1. BACKGROUND/SCOPE OF WORKS

1.1 GVA Grimley has been instructed by the London Borough of Barnet to update retail capacity projections previously set out in the Town Centres Floorspace Needs Assessment (TCFNA) 2009. Recent economic circumstances have led to the need for a further review of the assessment and need for new floorspace in the Borough. This paper sets out the findings of our update, and forecasts the need for further convenience and comparison retail floorspace to the period 2026, incorporating interim years of 2011, 2016 and 2021. The capacity tables accompanying this assessment are attached in Appendix 1 and 2.

1.2 We should note with caution the growing margins of error when forecasting over such lengthy time periods, and as recommended in policy, the Council should review these forecasts at appropriate times throughout the LDF period, generally no longer than 5 year intervals. Nevertheless, long term forecasting gives a good indication of the broad levels of growth expected between 2010 and 2016, based on current research and evidence.

1.3 This piece of work has been commissioned in order to take into account planning commitments for additional retail floorspace granted consent since the 2009 study; to take into account the recent economic circumstances/recession; and to assist in the consideration of recent investor interest in the Borough leading to proposals for further convenience and comparison goods retail floorspace.

1.4 Using the same approach incorporated in the 2009 TCFNA, we have explored the capacity for further comparison and convenience goods retail floorspace within two scenarios. First, we forecast capacity at a global level for the whole of the Borough; and second, we forecast capacity within the defined sub-areas illustrated on Plan 2.

Population

1.5 Using the same approach adopted in the TCFNA we have established the baseline population at 2010 using the Experian E-Marketer system which provides estimates of population based on trend line projections and the 2001 census for small, localised areas. Using the latest data from the Council and GLA's forecasts we have calculated individual growth rates for each zone broadly within the Borough boundary (Zones 1-11). These growth rates have been applied to the Experian baseline at 2010. We have adopted Experian's population forecasts at 2011, 2016, 2021 and 2026 for Zones 12-16.

1.6 The survey area and breakdown of zones is illustrated on Plan 1. The survey area extends beyond the Borough boundary (broadly Zones 1-11) to include parts of neighbouring Boroughs (Enfield, Haringey, Camden, Brent, Harrow and Hertsmere). This is intended to capture the combined sphere of influence of Barnet's centres across the wider area.

1.7 We estimate the overall population of the survey area is currently 697,051 (2010). The total population of the survey area is forecast to grow to 705,633 by 2011, to 745,957 by 2016, to 772,043 by 2021 and to 784,892 by 2026 (Table 1, Appendix 1). These figures represent an overall growth of 12.6% between 2010 and 2026.

Expenditure Growth

1.8 The Experian E-Marketer database also provides estimates of per capita expenditure for convenience and comparison goods in 2008 prices. We have made deductions for special forms of trading which represents expenditure not available to spend in the shops, i.e. internet and catalogue shopping. We have applied per capita expenditure for convenience and comparison goods within each zone to the population forecasts.

1.9 Since the TCFNA was undertaken the economy has gone through a period of rapid deterioration which has had far-reaching implications on available income, and consequently expenditure. Recent research by Verdict suggests that 'growth will be lacklustre. However, as GDP growth improves through 2012 onwards, retail expenditure should also benefit'[1].

1.10 Growth projections used in Retail Studies and supporting retail statements for planning applications should therefore respond to advice in respect of the most recent economic expectations, followed by ultra long term trends in the longer term projections. Paragraph B.21, Appendix B of the Good Practice Guide on Need, Impact and the Sequential Approach states that expenditure growth rates should draw on national long-term trends, but may also have regard to expectations about future regional economic performance and to recent evidence of retail growth. It recommends that growth rates should generally adopt a conservative level of growth in order to reflect the inherent uncertainty in economic forecasts, and the cyclical nature of the retail sector.

1.11 The growth projections used within this update have therefore responded to advice in respect of the use of trend line (historic) growth rates and forecast growth rates based on consumer expectations. Due to the retail expenditure boom in the latter half of the 1990s and the first half of the 2000s and the more recent economic recession, there are significant differences between these two approaches.

1.12 Trend growth rates have, until recently, been influenced by the spending boom of recent years (until 2007). Trend line forecasting, based on these historic trends, incorporate booms and busts since the 1960s and therefore provide a flat rate average over long and ultra long-time periods, i.e. beyond 2021. These are no longer appropriate for short-term retail projections given the current slow-down in the economy. The period up to 2016 will be affected noticeably by the recession and the weak upturn that is likely to follow. The time period required to enable growth rates to return to 'boom' levels is unknown, but it is clear that this is unlikely to happen before 2016.

[1] Verdict Datamonitor, July 2010, UK Retail Futures 2014: Retail & the Economy

1.13 On this basis we are advised to use economic forecasts prepared by MapInfo/Oxford Economic Forecasting and Experian Business Strategies which take into consideration current and future economic instability. Evidently, the growth rates used for our retail capacity forecasting have changed as a consequence, and have considerable implications on the levels of floorspace town centres can sustain in the short-to-medium term, i.e. up to 2016. In the previous study we applied a consistent growth rate of 0.3% per annum for convenience goods and 3.7% per annum for comparison goods. For this update we have applied the following growth rates:

Period	Convenience Goods	Comparison Goods
2008-2009	0.5% pa	1.1% pa
2009-2010	0.1% pa	-0.1% pa
2010-2011	0.9% pa	1.4% pa
2011-2016	1.1% pa	2.6% pa
2016-2026	0.5% pa	4.7% pa

1.14 Changes should also be factored in, in respect of sales efficiency rates. This growth represents the ability of retailers to increase their productivity and absorb higher than inflation increases in their costs (such as rents, rates and service charges) by increasing their average sales densities. The application of a turnover 'efficiency' growth rate is a standard approach used in retail planning studies and PPS4 also advocates the use of a realistic assessment of 'forecast improvements in retail sales efficiency' (EC1.4.c.iii).

1.15 Based on advice published by Experian we have adopted our standardised approach and amended sales efficiency growth for comparison goods to 1.1% per annum between 2010 and 2011, 1.7% per annum between 2011 and 2016 and 2% per annum post 2016. For convenience goods we assume 0.5% per annum sales efficiency growth between 2011 and 2026. In accordance with best practice we have applied this to out-of-centre foodstores although it should be acknowledged that this may marginally understate capacity that could be appropriately met by development located in centres.

Special Forms of Trading

1.16 Non-store retail sales (or sales by special forms of trading) comprise more than just sales on the internet, or e-tailing. They include e-tailing and mail order and street market stalls. Internet retail sales comprise sales by bricks and mortar retailers and sales by wholly internet-based businesses. Non-store retail sales, excluding e-tailing, are expected to decline over the next ten years, but this will be more than offset by the growth of e-tailing, resulting in overall growth in non-store sales in absolute and percentage terms.

1.17 Total non-store convenience retail sales (including e-tailing) are expected to increase from 3.8% of sales in 2010, to 4.0% in 2011, to 5.0% in 2016 and 5.2% in 2021. These special forms of trading (SFT) are expected to stabilise around 5.5% at 2025. Total comparison non-store retail sales are expected to increase from 9.1% in 2010, to 9.7% in 2011 before stabilising at 11.5% from 2016 onwards.

1.18 These growth forecasts take into account Experian's latest forecasts published in the Retail Planner note on non-store retailing (March 2010). The revised figures assume lower growth than that assumed in the 2009 study which forecast growth in SFT up to 8.1% by 2016 for convenience goods and 13.9% by 2016 for comparison goods.

Available Expenditure

1.19 Table 2 in Appendices 1 and 2 applies per capita expenditure to the population forecasts, which indicates that total available convenience goods expenditure within the survey area is currently £1.292billion (b from hereon). This is forecast to grow to £1.317b by 2011, to £1.450b by 2016, to £1.532b by 2021, and to £1.588b by 2026. This equates to an overall growth of £296m (23%) between 2010 and 2026. This is greater than the level of growth estimated in the 2009 study (15% between 2009 and 2026) reflecting variations in the growth rates applied.

1.20 Total available comparison goods expenditure within the survey area is currently £2.020b, and is forecast to grow to £2.060b by 2011, to £2.415b by 2016, to £2.138b by 2021 and to £4.000b by 2026. This equates to an overall growth of £1.979b (98%) between 2010 and 2026. This is lower than the 2009 study which identified growth in the region of 107%; however this update reflects the significant implications of the economic downturn, particularly to the period 2016.

Quantifying Retail Need

1.21 We have used a conventional step-by-step methodology, consistent with best practice, to examine quantitative need across the survey area. This draws on the results of the household telephone survey of existing shopping patterns to model the flows of available expenditure to different retail destinations. The model illustrates the total available pot of convenience goods expenditure and then identifies claims on this expenditure in respect of existing retail floorspace (both in and out-of-centre) and the ability of this to increase their sales efficiency in the future, special forms of trading and finally retail planning commitments not yet implemented. When existing claims on expenditure have been deducted, we can identify the pot of residual expenditure to support new retail floorspace in the future.

2. CONVENIENCE GOODS ASSESSMENT

2.1 In the TCFNA we identified baseline global capacity for 103 sqm net at 2011, increasing to 3,233 sqm net by 2016 and 5,028 by 2021. Addressing each sub-area across the Borough in turn, we have reviewed shopping patterns derived from the 2008 telephone survey results, and the performance of existing convenience goods floorspace based on the updated population and expenditure forecasts (Appendix 1).

Existing Claims on Capacity

2.2 Through discussions with the Council it is apparent that there have been several new foodstore developments since the previous study, in addition to other committed convenience goods retail floorspace which needs to be taken into account in our model as a claim on the existing pot of available expenditure.

2.3 In the 2009 study we modelled five commitments with a combined convenience floorspace of 1,628 sqm. As part of this update, we have carried four of these commitments forward (the fifth has now expired) along with a further 13 commitments which have been granted consent since the previous study. All commitments combined amount to a convenience floorspace of 5,673 sqm net. We have included a comprehensive list of all commitments (both built and unbuilt) which have been factored into our analysis in Appendix 1. In addition to identified commitments, we expect that there are likely to be other commitments for additional floorspace located outside the Borough which may also have potential to absorb capacity and impact on centres within the Borough.

2.4 Based on company average sales derived from Verdict (2009) where possible, we estimate that the current level of additional floorspace identified as commitments will generate a combined turnover in the region of £31.7m at 2011 (Table 59, Appendix 1).

Convenience Goods Capacity

2.5 Based on current market shares, on a global scale we project capacity to support 4,323 sqm net at 2011, increasing to 8,240 sqm net by 2016, 9,878 sqm net by 2021 and 9,888 sqm net by 2026 (Table 61, Appendix 1). This is higher level of capacity than identified in the previous study, reflecting marginally higher population and expenditure growth and lower deductions for SFT.

2.6 Tables 1.1 and 1.2 below demonstrate the breakdown of available expenditure and floorspace capacity for additional convenience goods floorspace in the different sub-areas of the Borough.

Table 1.1: Residual Convenience Goods Expenditure by Sub-Area (£m)

	2011 (£m)	2016 (£m)	2021 (£m)
Borough	**43,450**	**84,903**	**104,355**
North	10,914	13,292	13,509
West	971	21,477	32,004
East	59,698	68,245	71,699
South East	2,213	5,446	7,010
South West	-30,346	-23,557	-19,867

Source: GVA Grimley Convenience Capacity Modelling, Appendix 1

Table 1.2: Convenience Floorspace Capacity by Sub-Area (sqm net)

	2011 (sqm net)	2016 (sqm net)	2021 (sqm net)
Borough	**4,323**	**8,240**	**9,878**
North	1,086	1,290	1,279
West	97	2,084	3,030
East	5,940	6,623	6,787
South East	220	529	664
South West	-3,020	-2,286	-1,881

Source: GVA Grimley Convenience Capacity Modelling, Appendix 1

2.7 It is evident that, consistent with the previous study, the largest proportion of capacity arises in the East, largely as a result of the strong performance of the Sainsbury's North Finchley (Table 27, Appendix 1) and fewer commitments claiming capacity. There is a reasonable level of capacity arising in the North (Chipping Barnet and New Barnet) despite new commitments in Chipping Barnet (Tesco Express and Sainsbury's Local). By 2016 there is also reasonable capacity arising in the West (Edgware) reflecting anticipated population growth in Zones 8 and 9 between 2016 and 2026 (Table 1, Appendix 1). There is marginal capacity arising in the south-east sub-area and negative capacity arising in the south-west sub-area. The latter is reflective of the more modest performance of existing foodstores in this part of the Borough.

Convenience Goods Capacity with Pipeline Development

2.8 Consistent with the previous study we have undertaken convenience goods capacity scenarios, examining the implications for capacity of development in the pipeline coming forward which is set out in Table 60 in Appendix 1. Based on constant market share, the baseline convenience goods capacity assessment identifies global capacity for additional floorspace in the Borough at 2011, taking into all account identified commitments. The scenario testing seeks to understand the effects of new development on capacity.

2.9 For the scenario testing we have sought to anticipate when development is likely to come forward. The timing of development affects the estimates of capacity as there will be more growth and expenditure to support new floorspace over a longer timescale. Given that a planning application for the Tesco Express at Great North Road has already been submitted to the Council, it is possible that this store, subject to approval, could realistically come forward by 2011. We have anticipated that residual floorspace allocated within the Mill Hill and Colindale AAPs[2] would not come forward until at least 2016. Finally, we understand that the replacement Tesco Extra store and unit shops at Brent Cross South would not come forward until 2018 so we have factored this development into our forecasts for 2021.

2.10 Table 1.3 demonstrates the effects of pipeline development coming forward at the different intervals stated above, on the capacity in South-West, West and North sub-areas of the Borough. There are no identified pipeline developments emerging in the East or South-East sub-areas.

Table 1.3: Scenario Testing of Convenience Goods Capacity by Sub-Area (sqm net)

	2011 (sqm net)	**2016 (sqm net)**	**2021 (sqm net)**
Global Baseline Capacity	4,323	8,240	9,878
Residual Capacity assuming Pipeline development* comes forward	**3,847**	**7,235**	**2,218**
North Baseline Capacity	1,086	1,290	1,279
Residual Capacity assuming Pipeline development* comes forward	**609**	**813**	**802**
West Baseline Capacity	97	2,084	3,030
Residual Capacity assuming Pipeline development* comes forward	97	**1,556**	**2,501**
East Baseline Capacity	5,940	6,623	6,787
South East Baseline Capacity	220	529	664
South West Baseline Capacity	-3,020	-2,286	-1,881
Residual Capacity assuming Pipeline development* comes forward	-3,020	-2,286	**-8,536**

Source: GVA Grimley Convenience Capacity Modelling, Appendix 1 *listed in Table 60, Appendix 1

2.11 In the North sub-area there is capacity to support the Tesco Express at Great North Road at 2011 and marginal residual capacity (609 sqm net) available over and above this.

2.12 In the West sub-area there is capacity to support residual floorspace allocated within the Mill Hill and Colindale AAPs and residual capacity to support a further 1,556 sqm net of additional convenience goods floorspace.

[2] Some of the allocated floorspace has already been granted planning consent and has therefore been factored in as a commitment.

2.13 In the South West sub-area we anticipate that the replacement Tesco Extra store and unit shops and Brent Cross South would have been built by 2018 and we have therefore made an allowance for this in our forecasts at 2021. As previously highlighted, on the basis of current market share this level of development would create a significant oversupply of convenience goods floorspace in the sub-area. This surplus could be to the extent of -8,536 sqm net by 2021 and -8,374 by 2026 (Table 72, Appendix 1). However, as previously acknowledged, the whole ethos for Brent Cross Cricklewood is to create a new town centre we anticipate that there will be a significant increase in market share such that the new convenience floorspace would be supported.

3. COMPARISON GOODS ASSESSMENT

3.1 In the TCFNA we identified baseline global capacity for 11,356 sqm net at 2011, increasing to 47,917 sqm net by 2016 and 81,024 by 2021. Addressing each sub-area across the Borough in turn, we have reviewed shopping patterns derived from the 2008 telephone survey results, and the performance of existing convenience goods floorspace based on the updated population and expenditure forecasts (Appendix 2).

Existing Claims on Capacity

3.2 When forecasting capacity for new comparison goods floorspace in the Borough, our model has taken into consideration commitments for new comparison goods floorspace. The previous study identified four commitments which were, on the whole, of a reasonably small scale. As part of this update we have carried three previously identified commitments forward and factored in ten additional commitments. Again these are generally small-scale individually, however in total we have identified 7,046 sqm net additional comparison goods floorspace coming forward across the Borough (Table 55, Appendix 2) with could achieve a combined turnover of £21.4m at 2011.

Comparison Goods Capacity

3.3 Based on current market shares and reflecting the slowdown in the economy, we have not identified any capacity in the short-term. In contrast to our previous findings we project an oversupply of floorspace, in the region of -2,268 sqm net, by 2011 (Table 57, Appendix 2). However, reflecting anticipated improvements in economic growth in the longer term, by 2016 we forecast capacity to support 13,762 sqm net, increasing to 50,853 sqm net by 2021.

3.4 Tables 1.4 and 1.5 demonstrate the breakdown of available expenditure and floorspace capacity for additional comparison goods floorspace in the different sub-areas of the Borough. It is evident that, consistent with our previous assessment, the majority of capacity is arising in the South-West sub-area (Brent Cross/Cricklewood). There is also some modest capacity arising in the East (North Finchley), West (Edgware) and North (Chipping Barnet).

3.5 We do not project any capacity in the South-East (Golders Green/Temple Fortune) sub-area in the short-medium term and by 2021 we project only marginal capacity to support 302 sqm net additional comparison goods floorspace.

Table 1.4: Residual Comparison Goods Expenditure by Sub-Area (£000)

	2011 (£000)	2016 (£000)	2021 (£000)
Borough	**-12,613**	**83,255**	**339,652**
North	-163	698	5,463
West	-940	15,199	46,902
East	-2,592	2,820	32,949
South East	-423	-26	2,019
South West	-8,495	64,564	252,320

Source: GVA Grimley Comparison Capacity Modelling, Appendix 2

Table 1.5: Comparison Floorspace Capacity by Sub-Area (sqm net)

	2011 (sqm net)	2016 (sqm net)	2021 (sqm net)
Borough	**-2,268**	**13,762**	**50,853**
North	-29	115	818
West	-169	2,512	7,022
East	-466	466	4,933
South East	-76	-4	302
South West	-1,528	10,673	37,777

Source: GVA Grimley Comparison Capacity Modelling, Appendix 2

Comparison Goods Capacity with Pipeline Development

3.6 As part of our update assessment, we have examined the implications for capacity of comparison developments coming forward (Table 56, Appendix 2). As before, we have drawn on estimates by GVA Grimley and information provided by the Council.

3.7 Brent Cross Cricklewood remains the most significant retail development in the pipeline. The outline planning application has been approved by the Secretary of State however the S.106 agreement is still awaiting completion and therefore formal planning consent has yet to be granted. The development has potential to provide approximately 28,590 sqm net of new comparison goods floorspace, likely to be built by 2018, which could equate to a turnover of £208m by 2021.

3.8 We also anticipate some comparison floorspace coming forward as part of the offer in the replacement Tesco Extra store at Brent Cross South Retail Park and as part of the residual floorspace allocated within the Colindale AAP.

3.9 We have anticipated that new comparison floorspace could come forward Colindale by 2016 whilst development at Brent Cross South and Brent Cross Cricklewood has been factored in by 2021.

3.10 The global capacity forecasts demonstrate that pipeline development will meet a significant proportion of capacity up to 2021 (Table 63, Appendix 2). Table 1.6 illustrates that by 2021, the amount of floorspace taken up by proposed developments in the pipeline has the potential to reduce capacity from 50,853 sqm net to 16,800 sqm net. This is just over half the amount of residual capacity identified after commitments and pipeline development in the previous study (32,301 sqm net). On this basis, we would re-emphasise out previous advice that, with this level of residual capacity it will be more appropriate to plan for modest comparison goods development in the Borough including extensions to existing town centre schemes and more modest extensions to current centres.

3.11 Given that there are no identified developments in the pipeline coming forward in the North, East or South-East sub-areas, the capacity forecasts remain the same as the baseline. After taking into account pipeline development planned as part of the Colindale AAP, we forecast reasonable capacity arising in the West sub-region in the medium-long term. After taking into account Brent Cross Cricklewood by 2021, we project some residual capacity in the South West to support further comparison goods floorspace in the sub-region.

Table 1.6: Scenario Testing of Comparison Goods Capacity by Sub-Area (sqm net)

	2011 (sqm net)	2016 (sqm net)	2021 (sqm net)
Global Baseline Capacity	-2,268	13,762	50,853
Residual Capacity assuming Pipeline development* comes forward	-2,268	**13,314**	**16,800**
North Baseline Capacity	-29	115	818
West Baseline Capacity	-169	2,512	7,022
Residual Capacity assuming Pipeline development* comes forward	-169	**2,064**	**6,574**
East Baseline Capacity	-466	466	4,933
South East Baseline Capacity	-76	-4	302
South West Baseline Capacity	-1,528	10,673	37,777
Residual Capacity assuming Pipeline development* comes forward	-1,528	10,673	**4,173**

Source: GVA Grimley Comparison Capacity Modelling, Appendix 2 *listed in Table 56, Appendix 2

4. SUMMARY

4.1 The focus of this update has been to take into consideration changes in the economic outlook following the recent recession and to consider the effect of additional commitments and pipeline developments having come forward since the previous study.

4.2 Reflecting the recent recession, it is evident that growth in comparison goods expenditure is much lower than previously anticipated. In contrast, our projections for convenience goods expenditure have improved. Forecast growth of SFT (including internet spending) for both comparison and convenience goods, is now thought to be lower than previously anticipated. These key changes have obviously had an impact on the overall level of capacity identified in the Borough. In short, the pot of available comparison goods expenditure floorspace has fallen whilst available convenience goods expenditure has increased.

4.3 Another key variable has been the change in commitments since the previous study. In terms of convenience goods, we previously modelled five commitments with a combined convenience floorspace of 1,628 sqm. As part of this update, we have carried four of these commitments forward (the fifth has now expired) along with a further 13 commitments which have been granted consent since the previous study. All commitments combined amount to a convenience floorspace of 5,673 sqm net with potential to turnover £31m.

4.4 Despite an increase in claims on available convenience goods expenditure, our revised forecasts indicate that there will be residual global capacity arising to support additional convenience goods floorspace at 2011 over and above these commitments. However, given the concentration of commitments within the South-West sub-area this does result in an oversupply of floorspace in this sub-area for the remainder of the plan period. This oversupply is compounded at 2021 when we factor in development in the pipeline, notably the Tesco Extra at Brent Cross, although this is likely to be supportable given the significant increase in market share anticipated following the establishment of the new town centre envisaged for Brent Cross Cricklewood.

4.5 We have not taken into account any additional convenience goods provision at New Barnet and as such there is residual global capacity to support 2,218 sqm net additional convenience goods provision over and above existing commitments and pipeline developments and the Council should plan to meet this need in accordance with PPS4 Policy EC5. This capacity represents a global figure that could be met by several small-scale developments across the Borough and does not necessarily suggest capacity for a single large supermarket.

4.6 In terms of comparison goods, we have carried three commitments forward and factored in ten additional commitments amounting to a total of 7,046 sqm net. We estimate that these commitments have potential to turnover £21m.

4.7 As highlighted above, the change in economic growth over the plan period has significantly reduced available expenditure and subsequent capacity to support additional comparison goods floorspace in the Borough. As a result our forecasts now show negative capacity in the short term and a much lower level of capacity arising by 2016 and 2021 compared our previous assessment.

4.8 Notwithstanding this, there is still capacity to support identified commitments and pipeline developments by 2016 and Brent Cross Cricklewood by 2021. Our forecasts also show that there will be residual capacity over and above existing commitments and pipeline development to support further comparison goods floorspace over the plan period. Consistent with our previous advice, Edgware, North Finchley and Chipping Barnet should be the priority for new comparison goods development. In accordance with PPS4, it will be necessary to direct global capacity to town centres in the first instance before giving consideration to edge of centre sites; after which out-of-centre sites may be considered as a last resort.

PLAN 1

BARNET SUB-AREAS AND FOODSTORES

KEY

Borough Boundary	
Survey Zone	

Sub-Areas

- North
- West
- East
- South-East
- South-West

Foodstores

- Town Centre
- Out-of-Centre
- > 3,000 sqm net
- 1,000 - 3,000 sqm net
- < 1,000 sqm net

1	Sainburys, East Barnet Rd, New Barnet
2	Sainburys, High Rd, North Finchley
3	Sainburys, Broadwalk Centre, Edgware
4	Sainburys, Hyde Estate Rd
5	Sainburys, Finchley Rd, Golders Green
6	Tesco, Ballards Lane, Finchely Church End
7	Tesco, Sentinel Square, Brent Street
8	Tesco, Coppetts Centre, North Circular Rd
9	Tesco, Brent Cross, Hendon Way
10	Tesco Metro, Burnt Oak Broadway
11	Tesco Express, East Barnet Road
12	Tesco Express, Golders Green
13	Waitrose, Spires S.C, Chipping Barnet
14	Waitrose, High Rd, Whetstone
15	Waitrose, Finchley Rd, Temple Fortune
16	Waitrose, Ballards Lane, North Finchley
17	Waitrose, Langstone Way, Mill Hill East
18	Waitrose, Brent Cross Shopping Centre
19	M&S Simply Food, High Rd, Whetstone
20	M&S Simply Food, Broadwalk, Edgware
21	M&S Simply Food, Finchley Rd, Temple Fortune
22	M&S Simply Food, Broadway, Mill Hill
23	M&S Foodhall, Brent Cross
24	Somerfield, Cricklewood Lane
25	Lidl, Edgware Rd, Cricklewood

GVA Grimley
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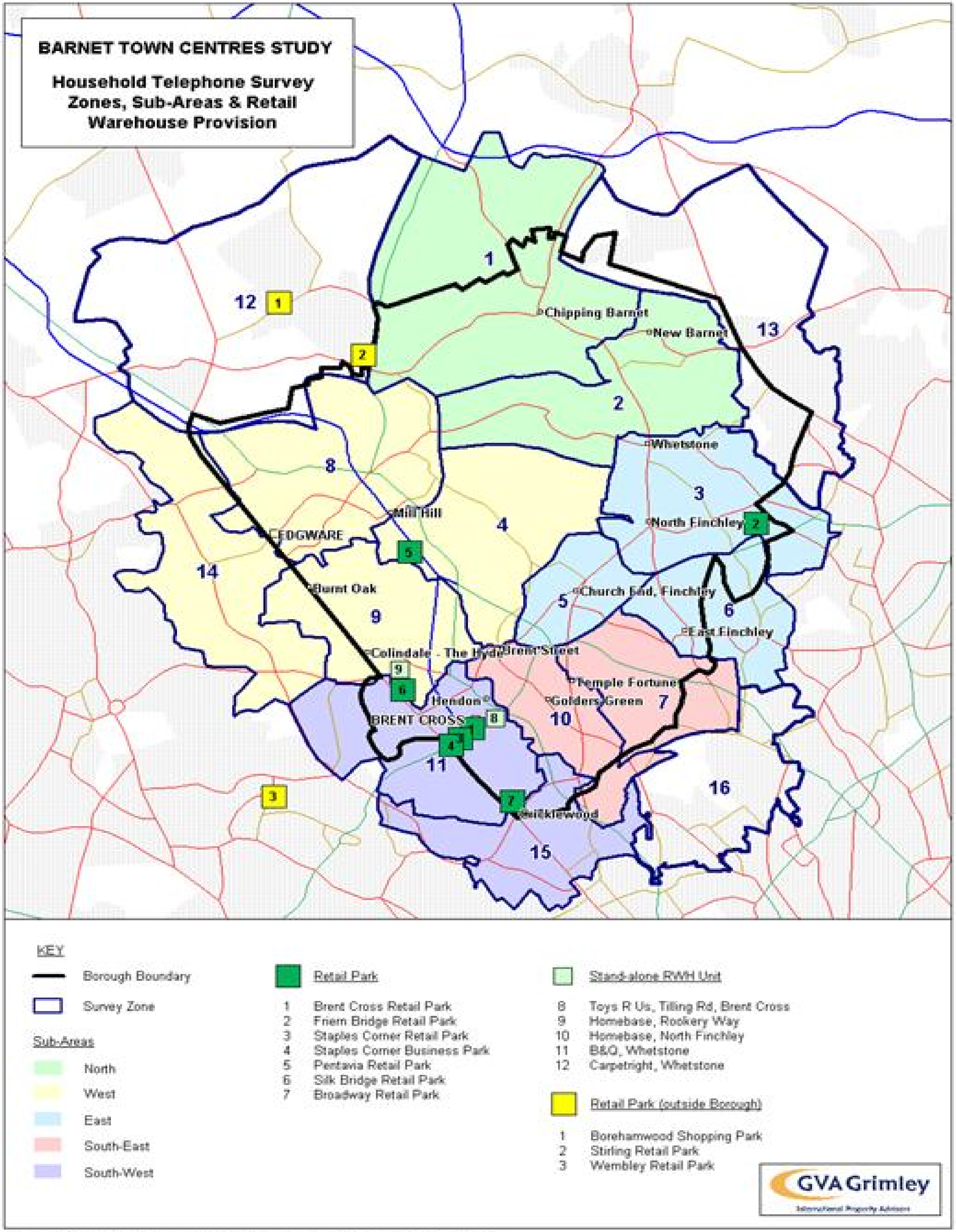
PLAN 2

BARNET SUB-AREAS AND RETAIL WAREHOUSES



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APPENDIX 1

CAPACITY PROJECTIONS: CONVENIENCE GOODS

LB BARNET
BOROUGH-WIDE TOWN CENTRES STUDY UPDATE 2010

TABLE 1
SURVEY AREA POPULATION FORECASTS

Catchment Zone	Postcode Sector Groupings	2010	2011	2016	2021	2026
1	EN5 2/3/4/5	30,899	**31,023**	**32,232**	**32,361**	**32,588**
2	EN5 1, EN4 8/9, N20 8/9	37,145	**37,294**	**37,555**	**38,080**	**38,994**
3	N20 0, N11 1/2/3, N12 0/8/9	61,118	**60,874**	**60,813**	**60,569**	**61,357**
4	N12 7, NW7 1/2, NW4 1	24,915	**25,837**	**30,255**	**31,011**	**28,810**
5	N3, 1/2/3	26,146	**25,963**	**25,677**	**26,140**	**24,101**
6	N2 8/9, N10 1/2/3	39,687	**39,449**	**38,818**	**38,701**	**37,114**
7	N2 0, NW11 6, N6 4	20,892	**20,704**	**20,373**	**20,149**	**18,376**
8	NW7 3/4, HA8 7/8/9	40,468	**40,347**	**40,790**	**41,484**	**45,093**
9	HA8 0/5, NW9 0/5/6, NW4 4	60,052	**62,274**	**70,058**	**70,899**	**76,216**
10	NW4 2, NW3 7, NW11 0/7/8/9	37,052	**36,681**	**35,764**	**38,053**	**36,721**
11	NW4 3, NW2 1/6/7, NW9 7/8	51,207	**53,665**	**71,589**	**73,951**	**75,504**
12	WD6 1/2/3/4/5	35,789	36,096	37,579	39,141	40,566
13	EN4 0, N14 4/5/6/7	28,859	28,965	29,804	30,421	30,830
14	HA7 1/2/4, HA8 6, NW9 9	42,336	42,604	43,632	44,496	45,020
15	NW2 2/3/4/5, NW10 1, NW6 1/2/7, NW3 6	79,486	80,988	87,008	90,871	93,061
16	N6 5/6, N19 5, NW3 1/2/4/5, NW5 1/2	81,000	82,376	87,708	91,539	94,213
TOTAL		**697,051**	**705,138**	**749,656**	**767,868**	**778,564**

SOURCE: Experian Business Solutions, June 2010

TABLE 1A
POPULATION GROWTH RATES

2010-2011 (%)	2011-2016 (%)	2016-2021 (%)	2021-2026 (%)
0.4	3.9	0.4	0.7
0.4	0.7	1.4	2.4
-0.4	-0.1	-0.4	1.3
3.7	17.1	2.5	-7.1
-0.7	-1.1	1.8	-7.8
-0.6	-1.6	-0.3	-4.1
-0.9	-1.6	-1.1	-8.8
-0.3	1.1	1.7	8.7
3.7	12.5	1.2	7.5
-1.0	-2.5	6.4	-3.5
4.8	33.4	3.3	2.1
0.9	4.1	4.2	3.6
0.4	2.9	2.1	1.3
0.6	2.4	2.0	1.2
1.9	7.4	4.4	2.4
1.7	6.5	4.4	2.9
1.2	6.3	2.4	1.4

LB BARNET
BOROUGH-WIDE TOWN CENTRES STUDY UPDATE 2010

TABLE 2
CONVENIENCE GOODS RETAIL EXPENDITURE FORECASTS PER CAPITA (2008 PRICES)

Growth in Per Capita Expenditure:

2008 - 2009	**0.5% pa**
2009 - 2010	**0.1% pa**
2010 - 2011	**0.9% pa**
2011 - 2016	**1.1% pa**
2016 - 2026	**0.5% pa**

ZONE	2008		2010		2011		2016		2021		2026	
		Minus SFT 3.0%		Minus SFT 3.8%		Minus SFT 4.0%		Minus SFT 5.0%		Minus SFT 5.2%		Minus SFT 5.5%
1	1,960	1,901	1,972	1,897	1,990	1,910	2,101	1,996	2,154	2,042	2,209	2,087
2	1,942	1,884	1,954	1,879	1,971	1,892	2,082	1,978	2,135	2,024	2,189	2,068
3	1,870	1,814	1,881	1,810	1,898	1,822	2,005	1,905	2,056	1,949	2,107	1,992
4	1,984	1,924	1,996	1,920	2,014	1,933	2,127	2,021	2,181	2,067	2,236	2,113
5	2,073	2,011	2,085	2,006	2,104	2,020	2,223	2,111	2,279	2,160	2,336	2,208
6	2,017	1,956	2,029	1,952	2,047	1,965	2,162	2,054	2,217	2,102	2,273	2,148
7	2,156	2,091	2,169	2,087	2,188	2,101	2,312	2,196	2,370	2,247	2,430	2,296
8	1,910	1,853	1,921	1,848	1,939	1,861	2,048	1,945	2,099	1,990	2,152	2,034
9	1,667	1,617	1,677	1,613	1,692	1,624	1,787	1,698	1,832	1,737	1,879	1,775
10	2,064	2,002	2,076	1,997	2,095	2,011	2,213	2,102	2,269	2,151	2,326	2,198
11	1,749	1,697	1,760	1,693	1,775	1,704	1,875	1,781	1,923	1,823	1,971	1,863
12	1,849	1,794	1,860	1,789	1,877	1,802	1,982	1,883	2,032	1,927	2,084	1,969
13	1,946	1,888	1,958	1,883	1,975	1,896	2,086	1,982	2,139	2,028	2,193	2,072
14	1,775	1,722	1,786	1,718	1,802	1,730	1,903	1,808	1,951	1,850	2,000	1,890
15	1,833	1,778	1,844	1,774	1,861	1,786	1,965	1,867	2,015	1,910	2,066	1,952
16	2,137	2,073	2,150	2,068	2,169	2,082	2,291	2,177	2,349	2,227	2,408	2,276

Source: Experian Business Strategies, June 2010

LB BARNET
BOROUGH-WIDE TOWN CENTRES STUDY UPDATE 2010

TABLE 3
SURVEY AREA - TOTAL CONVENIENCE GOODS RETAIL EXPENDITURE FORECASTS

ZONE	2010 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)
1	58,611	59,251	64,346	66,095	68,022
2	69,811	70,574	74,282	77,061	80,647
3	110,608	110,926	115,826	118,027	122,192
4	47,839	49,951	61,138	64,113	60,872
5	52,454	52,446	54,215	56,466	53,207
6	77,469	77,536	79,746	81,342	79,724
7	43,592	43,498	44,737	45,267	42,192
8	74,803	75,094	79,353	82,565	91,724
9	96,881	101,159	118,950	123,157	135,308
10	74,011	73,777	75,185	81,844	80,718
11	86,675	91,462	127,528	134,779	140,638
12	64,042	65,037	70,771	75,414	79,880
13	54,350	54,926	59,073	61,688	63,893
14	72,725	73,690	78,881	82,301	85,103
15	141,003	144,659	162,440	173,570	181,664
16	167,519	171,541	190,904	203,843	214,415
TOTAL	**1,292,392**	**1,315,527**	**1,457,374**	**1,527,534**	**1,580,199**

Source: Tables 1 & 2

LB BARNET
BOROUGH-WIDE TOWN CENTRES STUDY UPDATE 2010

BRENT CROSS REGIONAL SHOPPING CENTRE

TABLE 4
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

Catchment Zone	Waitrose					Marks and Spencer Food Hall					TOTAL				
	2010	2011	2016	2021	2026	2010	2011	2016	2021	2026	2010	2011	2016	2021	2026
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
3	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
4	3	3	3	3	3	0	0	0	0	0	3	3	3	3	3
5	0	0	0	0	0	1	1	1	1	1	1	1	1	1	1
6	0	0	0	0	0	1	1	1	1	1	1	1	1	1	1
7	3	3	3	3	3	0	0	0	0	0	3	3	3	3	3
8	1	1	1	1	1	0	0	0	0	0	1	1	1	1	1
9	2	2	2	2	2	0	0	0	0	0	2	2	2	2	2
10	3	3	3	3	3	1	1	1	1	1	4	4	4	4	4
11	9	9	9	9	9	2	2	2	2	2	11	11	11	11	11
12	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
13	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
14	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
15	2	2	2	2	2	1	1	1	1	1	4	4	4	4	4
16	3	3	3	3	3	0	0	0	0	0	3	3	3	3	3

SOURCE: Household Survey, September 2008

TABLE 5
CONVENIENCE GOODS ALLOCATION - SPEND (£) 2008 PRICES

Catchment Zone	Waitrose					Marks and Spencer Food Hall					TOTAL				
	2010	2011	2016	2021	2026	2010	2011	2016	2021	2026	2010	2011	2016	2021	2026
	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)
1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
3	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
4	1,363	1,424	1,742	1,827	1,735	0	0	0	0	0	1,363	1,424	1,742	1,827	1,735
5	0	0	0	0	0	590	590	610	635	599	590	590	610	635	599
6	0	0	0	0	0	581	582	598	610	598	581	582	598	610	598
7	1,515	1,512	1,555	1,573	1,466	0	0	0	0	0	1,515	1,512	1,555	1,573	1,466
8	1,066	1,070	1,131	1,177	1,307	0	0	0	0	0	1,066	1,070	1,131	1,177	1,307
9	2,180	2,276	2,676	2,771	3,044	0	0	0	0	0	2,180	2,276	2,676	2,771	3,044
10	2,461	2,453	2,500	2,721	2,684	555	553	564	614	605	3,016	3,006	3,064	3,335	3,289
11	8,017	8,460	11,796	12,467	13,009	1,495	1,578	2,200	2,325	2,426	9,513	10,038	13,996	14,792	15,435
12	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
13	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
14	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
15	3,384	3,472	3,899	4,166	4,360	1,622	1,664	1,868	1,996	2,089	5,006	5,135	5,767	6,162	6,449
16	5,067	5,189	5,775	6,166	6,486	503	515	573	612	643	5,570	5,704	6,348	6,778	7,129
TOTALS	**25,054**	**25,856**	**31,074**	**32,868**	**34,091**	**5,345**	**5,481**	**6,413**	**6,792**	**6,960**	**30,399**	**31,336**	**37,486**	**39,660**	**41,052**

SOURCE: Tables 3 & 4

LB BARNET
BOROUGH-WIDE TOWN CENTRES STUDY UPDATE 2010

EDGWARE MAJOR CENTRE

TABLE 6
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

Catchment Zone	Sainsburys, Broadwalk Centre					Marks and Spencer Food Hall Broadwalk Centre					Other Stores in Edgware					TOTAL				
	2010	2011	2016	2021	2026	2010	2011	2016	2021	2026	2010	2011	2016	2021	2026	2010	2011	2016	2021	2026
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%) (%)		(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
3	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
4	5	5	5	5	5	0	0	0	0	0	2	2	2	2	2	7	7	7	7	7
5	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
6	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
7	0	0	0	0	0	1	1	1	1	1	1	1	1	1	1	2	2	2	2	2
8	29	29	29	29	29	3	3	3	3	3	0	0	0	0	0	32	32	32	32	32
9	8	8	8	8	8	0	0	0	0	0	0	0	0	0	0	9	9	9	9	9
10	0	0	0	0	0	0	0	0	0	0	6	6	6	6	6	6	6	6	6	6
11	0	0	0	0	0	0	0	0	0	0	8	8	8	8	8	9	9	9	9	9
12	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
13	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
14	12	12	12	12	12	2	2	2	2	2	0	0	0	0	0	14	14	14	14	14
15	1	1	1	1	1	0	0	0	0	0	2	2	2	2	2	3	3	3	3	3
16	2	2	2	2	2	0	0	0	0	0	0	0	0	0	0	2	2	2	2	2

SOURCE: Household Survey, September 2008

TABLE 7
CONVENIENCE GOODS ALLOCATION - SPEND (£) 2008 PRICES

Catchment Zone	Sainsburys, Broadwalk Centre					Marks and Spencer Food Hall Broadwalk Centre					Other Stores in Edgware					TOTAL				
	2010	2011	2016	2021	2026	2010	2011	2016	2021	2026	2010	2011	2016	2021	2026	2010	2011	2016	2021	2026
	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000) (£000)		(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)
1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
3	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
4	2,213	2,310	2,828	2,965	2,815	0	0	0	0	0	1,005	1,049	1,284	1,346	1,278	3,217	3,359	4,112	4,312	4,094
5	0	0	0	0	0	0	0	0	0	0	197	197	203	212	200	197	197	203	212	200
6	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
7	0	0	0	0	0	360	359	369	373	348	360	359	369	373	348	719	718	738	747	696
8	21,917	22,002	23,250	24,192	26,875	2,225	2,234	2,361	2,456	2,729	0	0	0	0	0	24,143	24,236	25,611	26,648	29,604
9	8,017	8,371	9,843	10,191	11,197	0	0	0	0	0	315	329	387	400	440	8,332	8,700	10,230	10,592	11,636
10	0	0	0	0	0	0	0	0	0	0	4,737	4,722	4,812	5,238	5,166	4,737	4,722	4,812	5,238	5,166
11	347	366	510	539	563	0	0	0	0	0	7,324	7,729	10,776	11,389	11,884	7,671	8,094	11,286	11,928	12,446
12	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
13	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
14	8,472	8,585	9,190	9,588	9,914	1,582	1,603	1,716	1,790	1,851	0	0	0	0	0	10,054	10,188	10,905	11,378	11,765
15	1,163	1,193	1,340	1,432	1,499	0	0	0	0	0	3,384	3,472	3,899	4,166	4,360	4,547	4,665	5,239	5,598	5,859
16	3,141	3,216	3,579	3,822	4,020	0	0	0	0	0	0	0	0	0	0	3,141	3,216	3,579	3,822	4,020
TOTALS	**45,270**	**46,044**	**50,540**	**52,729**	**56,883**	**4,167**	**4,196**	**4,445**	**4,620**	**4,928**	**17,321**	**17,855**	**21,729**	**23,124**	**23,675**	**66,758**	**68,095**	**76,715**	**80,474**	**85,486**

SOURCE: Tables 3 & 6

LB BARNET
BOROUGH-WIDE TOWN CENTRES STUDY UPDATE 2010

BRENT STREET DISTRICT CENTRE

TABLE 8
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

Catchment Zone	Tesco					Other Stores in Brent Street					TOTAL				
	2010	2011	2016	2021	2026	2010	2011	2016	2021	2026	2010	2011	2016	2021	2026
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
3	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
4	5	5	5	5	5	1	1	1	1	1	6	6	6	6	6
5	1	1	1	1	1	0	0	0	0	0	1	1	1	1	1
6	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
7	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
8	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
9	1	1	1	1	1	0	0	0	0	0	1	1	1	1	1
10	11	11	11	11	11	0	0	0	0	0	11	11	11	11	11
11	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
12	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
13	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
14	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
15	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
16	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

SOURCE: Household Survey, September 2008

TABLE 9
CONVENIENCE GOODS ALLOCATION - SPEND (£) 2008 PRICES

Catchment Zone	Tesco					Other Stores In Brent Street					TOTAL				
	2010	2011	2016	2021	2026	2010	2011	2016	2021	2026	2010	2011	2016	2021	2026
	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)
1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
3	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
4	2,404	2,510	3,072	3,222	3,059	419	437	535	561	533	2,822	2,947	3,607	3,783	3,591
5	393	393	407	423	399	0	0	0	0	0	393	393	407	423	399
6	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
7	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
8	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
9	1,041	1,087	1,279	1,324	1,455	0	0	0	0	0	1,041	1,087	1,279	1,324	1,455
10	7,845	7,820	7,970	8,675	8,556	0	0	0	0	0	7,845	7,820	7,970	8,675	8,556
11	347	366	510	539	563	0	0	0	0	0	347	366	510	539	563
12	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
13	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
14	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
15	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
16	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
TOTALS	**12,031**	**12,177**	**13,237**	**14,184**	**14,031**	**419**	**437**	**535**	**561**	**533**	**12,449**	**12,614**	**13,772**	**14,745**	**14,564**

SOURCE: Tables 3 & 8

LB BARNET
BOROUGH-WIDE TOWN CENTRES STUDY UPDATE 2010

CHIPPING BARNET DISTRICT CENTRE

TABLE 10
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

Catchment Zone	Waitrose, The Spires					Other Stores in chipping Barnet					TOTAL				
	2010	2011	2016	2021	2026	2010	2011	2016	2021	2026	2010	2011	2016	2021	2026
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	24	24	24	24	24	3	3	3	3	3	27	27	27	27	27
2	3	3	3	3	3	0	0	0	0	0	3	3	3	3	3
3	0	0	0	0	0	0	0	0	0	0	1	1	1	1	1
4	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
5	1	1	1	1	1	0	0	0	0	0	1	1	1	1	1
6	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
7	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
8	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
9	0	0	0	0	0	2	2	2	2	2	2	2	2	2	2
10	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
11	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
12	0	0	0	0	0	1	1	1	1	1	1	1	1	1	1
13	3	3	3	3	3	0	0	0	0	0	3	3	3	3	3
14	0	0	0	0	0	1	1	1	1	1	1	1	1	1	1
15	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
16	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

SOURCE: Household Survey, September 2008

TABLE 11
CONVENIENCE GOODS ALLOCATION - SPEND (£) 2008 PRICES

Catchment Zone	Waitrose, The Spires					Other Stores in Chipping Barnet					TOTAL				
	2010	2011	2016	2021	2026	2010	2011	2016	2021	2026	2010	2011	2016	2021	2026
	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)
1	14,213	14,368	15,604	16,028	16,495	1,832	1,852	2,011	2,065	2,126	16,045	16,220	17,615	18,094	18,621
2	2,374	2,400	2,526	2,620	2,742	0	0	0	0	0	2,374	2,400	2,526	2,620	2,742
3	332	333	347	354	367	332	333	347	354	367	664	666	695	708	733
4	144	150	183	192	183	0	0	0	0	0	144	150	183	192	183
5	393	393	407	423	399	0	0	0	0	0	393	393	407	423	399
6	0	0	0	0	0	232	233	239	244	239	232	233	239	244	239
7	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
8	224	225	238	248	275	0	0	0	0	0	224	225	238	248	275
9	0	0	0	0	0	1,574	1,644	1,933	2,001	2,199	1,574	1,644	1,933	2,001	2,199
10	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
11	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
12	0	0	0	0	0	480	488	531	566	599	480	488	531	566	599
13	1,563	1,579	1,698	1,774	1,837	0	0	0	0	0	1,563	1,579	1,698	1,774	1,837
14	0	0	0	0	0	545	553	592	617	638	545	553	592	617	638
15	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
16	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
TOTALS	**19,242**	**19,448**	**21,003**	**21,639**	**22,298**	**4,996**	**5,101**	**5,653**	**5,848**	**6,168**	**24,238**	**24,550**	**26,656**	**27,487**	**28,465**

SOURCE: Tables 3 & 10

LB BARNET
BOROUGH-WIDE TOWN CENTRES STUDY UPDATE 2010

CHURCH END, FINCHLEY DISTRICT CENTRE

TABLE 12
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

Catchment Zone	Tesco Metro, Ballards Lane					Other Stores in Finchley Church End					TOTAL				
	2010	2011	2016	2021	2026	2010	2011	2016	2021	2026	2010	2011	2016	2021	2026
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
3	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
4	16	16	16	16	16	0	0	0	0	0	16	16	16	16	16
5	34	34	34	34	34	0	0	0	0	0	34	34	34	34	34
6	5	5	5	5	5	0	0	0	0	0	5	5	5	5	5
7	3	3	3	3	3	0	0	0	0	0	3	3	3	3	3
8	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
10	1	1	1	1	1	0	0	0	0	0	1	1	1	1	1
11	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
12	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
13	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
14	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
15	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
16	1	1	1	1	1	0	0	0	0	0	1	1	1	1	1

SOURCE: Household Survey, September 2008

TABLE 13
CONVENIENCE GOODS ALLOCATION - SPEND (£) 2008 PRICES

Catchment Zone	Tesco Metro, Ballards Lane					Other Stores in Finchley Church End					TOTAL				
	2010	2011	2016	2021	2026	2010	2011	2016	2021	2026	2010	2011	2016	2021	2026
	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)
1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
3	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
4	7,594	7,930	9,706	10,178	9,663	0	0	0	0	0	7,594	7,930	9,706	10,178	9,663
5	17,703	17,701	18,298	19,057	17,957	197	197	203	212	200	17,900	17,897	18,501	19,269	18,157
6	4,125	4,129	4,246	4,331	4,245	0	0	0	0	0	4,125	4,129	4,246	4,331	4,245
7	1,515	1,512	1,555	1,573	1,466	0	0	0	0	0	1,515	1,512	1,555	1,573	1,466
8	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
10	555	553	564	614	605	0	0	0	0	0	555	553	564	614	605
11	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
12	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
13	163	165	177	185	192	0	0	0	0	0	163	165	177	185	192
14	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
15	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
16	1,382	1,415	1,575	1,682	1,769	0	0	0	0	0	1,382	1,415	1,575	1,682	1,769
TOTALS	**33,038**	**33,404**	**36,120**	**37,620**	**35,898**	**197**	**197**	**203**	**212**	**200**	**33,235**	**33,601**	**36,324**	**37,832**	**36,098**

SOURCE: Tables 3 & 12

LB BARNET
BOROUGH-WIDE TOWN CENTRES STUDY UPDATE 2010

EAST FINCHLEY DISTRICT CENTRE

TABLE 14
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

Catchment Zone	EAST FINCHLEY 2010 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)
1	0	0	0	0	0
2	0	0	0	0	0
3	0	0	0	0	0
4	0	0	0	0	0
5	0	0	0	0	0
6	4	4	4	4	4
7	3	3	3	3	3
8	0	0	0	0	0
9	0	0	0	0	0
10	0	0	0	0	0
11	0	0	0	0	0
12	0	0	0	0	0
13	0	0	0	0	0
14	0	0	0	0	0
15	0	0	0	0	0
16	0	0	0	0	0

SOURCE: Household Survey, September 2008

TABLE 15
CONVENIENCE GOODS ALLOCATION - SPEND (£) 2008 PRICES

Catchment Zone	EAST FINCHLEY 2010 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)
1	0	0	0	0	0
2	0	0	0	0	0
3	0	0	0	0	0
4	0	0	0	0	0
5	0	0	0	0	0
6	3,312	3,315	3,409	3,477	3,408
7	1,351	1,348	1,387	1,403	1,308
8	0	0	0	0	0
9	0	0	0	0	0
10	0	0	0	0	0
11	0	0	0	0	0
12	0	0	0	0	0
13	0	0	0	0	0
14	0	0	0	0	0
15	0	0	0	0	0
16	0	0	0	0	0
TOTALS	**4,663**	**4,663**	**4,796**	**4,881**	**4,716**

SOURCE: Tables 3 & 14

LB BARNET
BOROUGH-WIDE TOWN CENTRES STUDY UPDATE 2010

MILL HILL DISTRICT CENTRE

TABLE 16
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

Catchment Zone	MILL HILL 2010 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)
1	0	0	0	0	0
2	0	0	0	0	0
3	0	0	0	0	0
4	1	1	1	1	1
5	1	1	1	1	1
6	0	0	0	0	0
7	0	0	0	0	0
8	2	2	2	2	2
9	0	0	0	0	0
10	0	0	0	0	0
11	0	0	0	0	0
12	0	0	0	0	0
13	0	0	0	0	0
14	0	0	0	0	0
15	0	0	0	0	0
16	0	0	0	0	0

SOURCE: Household Survey, September 2008

TABLE 17
CONVENIENCE GOODS ALLOCATION - SPEND (£) 2008 PRICES

Catchment Zone	MILL HILL 2010 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)
1	0	0	0	0	0
2	0	0	0	0	0
3	0	0	0	0	0
4	562	587	718	753	715
5	393	393	407	423	399
6	0	0	0	0	0
7	142	141	145	147	137
8	1,608	1,615	1,706	1,775	1,972
9	0	0	0	0	0
10	0	0	0	0	0
11	0	0	0	0	0
12	0	0	0	0	0
13	0	0	0	0	0
14	0	0	0	0	0
15	0	0	0	0	0
16	0	0	0	0	0
TOTALS	**2,705**	**2,736**	**2,976**	**3,099**	**3,223**

SOURCE: Tables 3 & 16

LB BARNET
BOROUGH-WIDE TOWN CENTRES STUDY UPDATE 2010

COLINDALE DISTRICT CENTRE

TABLE 18
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

Catchment Zone	COLINDALE 2010 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)
1	0	0	0	0	0
2	0	0	0	0	0
3	0	0	0	0	0
4	0	0	0	0	0
5	0	0	0	0	0
6	0	0	0	0	0
7	0	0	0	0	0
8	0	0	0	0	0
9	1	1	1	1	1
10	0	0	0	0	0
11	0	0	0	0	0
12	0	0	0	0	0
13	0	0	0	0	0
14	0	0	0	0	0
15	0	0	0	0	0
16	0	0	0	0	0

SOURCE: Household Survey, September 2008

TABLE 19
CONVENIENCE GOODS ALLOCATION - SPEND (£) 2008 PRICES

Catchment Zone	COLINDALE 2010 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)
1	0	0	0	0	0
2	0	0	0	0	0
3	0	0	0	0	0
4	0	0	0	0	0
5	0	0	0	0	0
6	0	0	0	0	0
7	0	0	0	0	0
8	0	0	0	0	0
9	1,259	1,315	1,546	1,601	1,759
10	0	0	0	0	0
11	347	366	510	539	563
12	0	0	0	0	0
13	0	0	0	0	0
14	0	0	0	0	0
15	0	0	0	0	0
16	0	0	0	0	0
TOTALS	**1,606**	**1,681**	**2,056**	**2,140**	**2,322**

SOURCE: Tables 3 & 18

LB BARNET
BOROUGH-WIDE TOWN CENTRES STUDY UPDATE 2010

TEMPLE FORTUNE DISTRICT CENTRE

TABLE 20
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

Catchment Zone	Waitrose					Other Stores in Temple Fortune					TOTAL				
	2010	2011	2016	2021	2026	2010	2011	2016	2021	2026	2010	2011	2016	2021	2026
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
3	0	0	0	0	0	2	2	2	2	2	2	2	2	2	2
4	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
5	0	0	0	0	0	2	2	2	2	2	2	2	2	2	2
6	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
7	15	15	15	15	15	3	3	3	3	3	18	18	18	18	18
8	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
10	9	9	9	9	9	1	1	1	1	1	9	9	9	9	9
11	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
12	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
13	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
14	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
15	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
16	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

SOURCE: Household Survey, September 2008

TABLE 21
CONVENIENCE GOODS ALLOCATION - SPEND (£) 2008 PRICES

Catchment Zone	Waitrose					Other Stores in Temple Fortune					TOTAL				
	2010	2011	2016	2021	2026	2010	2011	2016	2021	2026	2010	2011	2016	2021	2026
	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)
1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
3	0	0	0	0	0	2,406	2,413	2,519	2,567	2,658	2,406	2,413	2,519	2,567	2,658
4	0	0	0	0	0	144	150	183	192	183	144	150	183	192	183
5	0	0	0	0	0	1,023	1,023	1,057	1,101	1,038	1,023	1,023	1,057	1,101	1,038
6	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
7	6,670	6,655	6,845	6,926	6,455	1,330	1,327	1,364	1,381	1,287	7,999	7,982	8,209	8,306	7,742
8	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
10	6,420	6,400	6,522	7,100	7,002	555	553	564	614	605	6,976	6,953	7,086	7,714	7,608
11	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
12	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
13	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
14	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
15	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
16	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
TOTALS	**13,090**	**13,055**	**13,367**	**14,026**	**13,458**	**5,457**	**5,465**	**5,688**	**5,855**	**5,770**	**18,547**	**18,520**	**19,055**	**19,881**	**19,228**

SOURCE: Tables 3 & 20

LB BARNET
BOROUGH-WIDE TOWN CENTRES STUDY UPDATE 2010

BURNT OAK DISTRICT CENTRE

TABLE 22
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

Catchment Zone	Tesco					Other Stores in Burnt Oak					TOTAL				
	2010	2011	2016	2021	2026	2010	2011	2016	2021	2026	2010	2011	2016	2021	2026
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
3	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
4	1	1	1	1	1	0	0	0	0	0	1	1	1	1	1
5	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
6	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
7	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
8	1	1	1	1	1	1	1	1	1	1	2	2	2	2	2
9	7	7	7	7	7	3	3	3	3	3	10	10	10	10	10
10	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
11	0	0	0	0	0	2	2	2	2	2	2	2	2	2	2
12	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
13	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
14	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
15	0	0	0	0	0	1	1	1	1	1	1	1	1	1	1
16	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

SOURCE: Household Survey, September 2008

TABLE 23
CONVENIENCE GOODS ALLOCATION - SPEND (£) 2008 PRICES

Catchment Zone	Tesco					Other Stores in Burnt Oak					TOTAL				
	2010	2011	2016	2021	2026	2010	2011	2016	2021	2026	2010	2011	2016	2021	2026
	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)
1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
3	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
4	359	375	459	481	457	0	0	0	0	0	359	375	459	481	457
5	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
6	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
7	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
8	916	920	972	1,011	1,124	561	563	595	619	688	1,477	1,483	1,567	1,631	1,812
9	6,975	7,283	8,564	8,867	9,742	2,616	2,731	3,212	3,325	3,653	9,591	10,015	11,776	12,193	13,395
10	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
11	0	0	0	0	0	1,690	1,784	2,487	2,628	2,742	1,690	1,784	2,487	2,628	2,742
12	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
13	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
14	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
15	0	0	0	0	0	1,340	1,374	1,543	1,649	1,726	1,340	1,374	1,543	1,649	1,726
16	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
TOTALS	**8,251**	**8,578**	**9,995**	**10,360**	**11,322**	**6,207**	**6,452**	**7,837**	**8,222**	**8,809**	**14,457**	**15,030**	**17,832**	**18,581**	**20,132**

SOURCE: Tables 3 & 22

LB BARNET
BOROUGH-WIDE TOWN CENTRES STUDY UPDATE 2010

CRICKLEWOOD DISTRICT CENTRE

TABLE 24
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

Catchment Zone	CRICKLEWOOD 2010 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)
1	0	0	0	0	0
2	0	0	0	0	0
3	0	0	0	0	0
4	0	0	0	0	0
5	0	0	0	0	0
6	0	0	0	0	0
7	0	0	0	0	0
8	0	0	0	0	0
9	0	0	0	0	0
10	0	0	0	0	0
11	2	2	2	2	2
12	0	0	0	0	0
13	0	0	0	0	0
14	0	0	0	0	0
15	2	2	2	2	2
16	0	0	0	0	0

SOURCE: Household Survey, September 2008

TABLE 25
CONVENIENCE GOODS ALLOCATION - SPEND (£) 2008 PRICES

Catchment Zone	CRICKLEWOOD 2010 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)
1	0	0	0	0	0
2	0	0	0	0	0
3	0	0	0	0	0
4	0	0	0	0	0
5	0	0	0	0	0
6	0	0	0	0	0
7	0	0	0	0	0
8	0	0	0	0	0
9	0	0	0	0	0
10	0	0	0	0	0
11	1,495	1,578	2,200	2,325	2,426
12	0	0	0	0	0
13	0	0	0	0	0
14	0	0	0	0	0
15	3,419	3,508	3,939	4,209	4,405
16	0	0	0	0	0
TOTALS	**4,914**	**5,086**	**6,139**	**6,534**	**6,831**

SOURCE: Tables 3 & 24

LB BARNET
BOROUGH-WIDE TOWN CENTRES STUDY UPDATE 2010

NORTH FINCHLEY DISTRICT CENTRE

TABLE 26
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

Catchment Zone	Sainsburys					Other Stores in North Finchley					TOTAL				
	2010	2011	2016	2021	2026	2010	2011	2016	2021	2026	2010	2011	2016	2021	2026
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
2	3	3	3	3	3	1	1	1	1	1	4	4	4	4	4
3	20	20	20	20	20	0	0	0	0	0	20	20	20	20	20
4	5	5	5	5	5	0	0	0	0	0	5	5	5	5	5
5	3	3	3	3	3	0	0	0	0	0	3	3	3	3	3
6	2	2	2	2	2	0	0	0	0	0	2	2	2	2	2
7	4	4	4	4	4	0	0	0	0	0	4	4	4	4	4
8	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
9	1	1	1	1	1	0	0	0	0	0	1	1	1	1	1
10	1	1	1	1	1	0	0	0	0	0	1	1	1	1	1
11	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
12	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
13	1	1	1	1	1	0	0	0	0	0	1	1	1	1	1
14	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
15	2	2	2	2	2	0	0	0	0	0	2	2	2	2	2
16	1	1	1	1	1	0	0	0	0	0	1	1	1	1	1

SOURCE: Household Survey, September 2008

TABLE 27
CONVENIENCE GOODS ALLOCATION - SPEND (£) 2008 PRICES

Catchment Zone	Sainsburys					Other Stores in North Finchley					TOTAL				
	2010	2011	2016	2021	2026	2010	2011	2016	2021	2026	2010	2011	2016	2021	2026
	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)
1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
2	2,374	2,400	2,526	2,620	2,742	471	476	501	520	544	2,845	2,876	3,027	3,140	3,286
3	21,845	21,908	22,876	23,310	24,133	0	0	0	0	0	21,845	21,908	22,876	23,310	24,133
4	2,356	2,460	3,011	3,158	2,998	0	0	0	0	0	2,356	2,460	3,011	3,158	2,998
5	1,416	1,416	1,464	1,525	1,437	0	0	0	0	0	1,416	1,416	1,464	1,525	1,437
6	1,917	1,919	1,974	2,013	1,973	0	0	0	0	0	1,917	1,919	1,974	2,013	1,973
7	1,874	1,870	1,924	1,946	1,814	0	0	0	0	0	1,874	1,870	1,924	1,946	1,814
8	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
9	1,041	1,087	1,279	1,324	1,455	0	0	0	0	0	1,041	1,087	1,279	1,324	1,455
10	796	793	808	880	868	0	0	0	0	0	796	793	808	880	868
11	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
12	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
13	571	577	620	648	671	0	0	0	0	0	571	577	620	648	671
14	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
15	3,243	3,327	3,736	3,992	4,178	0	0	0	0	0	3,243	3,327	3,736	3,992	4,178
16	1,382	1,415	1,575	1,682	1,769	0	0	0	0	0	1,382	1,415	1,575	1,682	1,769
TOTALS	**38,816**	**39,173**	**41,792**	**43,098**	**44,037**	**471**	**476**	**501**	**520**	**544**	**39,287**	**39,649**	**42,293**	**43,618**	**44,582**

SOURCE: Tables 3 & 26

LB BARNET
BOROUGH-WIDE TOWN CENTRES STUDY UPDATE 2010

NEW BARNET DISTRICT CENTRE

TABLE 28
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

Catchment Zone	Sainsburys					Other					TOTAL				
	2010	2011	2016	2021	2026	2010	2011	2016	2021	2026	2010	2011	2016	2021	2026
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	28	28	28	28	28	0	0	0	0	0	28	28	28	28	28
2	34	34	34	34	34	2	2	2	2	2	36	36	36	36	36
3	1	1	1	1	1	0	0	0	0	0	1	1	1	1	1
4	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
5	0	0	0	0	0	1	1	1	1	1	1	1	1	1	1
6	0	0	0	0	0	4	4	4	4	4	4	4	4	4	4
7	0	0	0	0	0	2	2	2	2	2	2	2	2	2	2
8	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
10	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
11	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
12	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
13	4	4	4	4	4	0	0	0	0	0	4	4	4	4	4
14	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
15	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
16	0	0	0	0	0	1	1	1	1	1	1	1	1	1	1

SOURCE: Household Survey, September 2008

TABLE 29
CONVENIENCE GOODS ALLOCATION - SPEND (£) 2008 PRICES

Catchment Zone	Sainsburys					Other					TOTAL				
	2010	2011	2016	2021	2026	2010	2011	2016	2021	2026	2010	2011	2016	2021	2026
	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)
1	16,557	16,738	18,178	18,672	19,216	0	0	0	0	0	16,557	16,738	18,178	18,672	19,216
2	23,544	23,801	25,052	25,989	27,198	1,326	1,341	1,411	1,464	1,532	24,870	25,142	26,463	27,453	28,731
3	830	832	869	885	916	0	0	0	0	0	830	832	869	885	916
4	0	0	0	0	0	144	150	183	192	183	144	150	183	192	183
5	0	0	0	0	0	393	393	407	423	399	393	393	407	423	399
6	0	0	0	0	0	3,176	3,179	3,270	3,335	3,269	3,176	3,179	3,270	3,335	3,269
7	0	0	0	0	0	719	718	738	747	696	719	718	738	747	696
8	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
10	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
11	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
12	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
13	2,079	2,101	2,260	2,360	2,444	0	0	0	0	0	2,079	2,101	2,260	2,360	2,444
14	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
15	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
16	0	0	0	0	0	1,047	1,072	1,193	1,274	1,340	1,047	1,072	1,193	1,274	1,340
TOTALS	**43,010**	**43,472**	**46,358**	**47,906**	**49,775**	**6,806**	**6,853**	**7,202**	**7,436**	**7,419**	**49,816**	**50,325**	**53,560**	**55,342**	**57,194**

SOURCE: Tables 3 & 28

LB BARNET
BOROUGH-WIDE TOWN CENTRES STUDY UPDATE 2010

WHETSTONE DISTRICT CENTRE

TABLE 30
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

Catchment Zone	Waitrose					Other Stores in Whetstone					TOTAL				
	2010	2011	2016	2021	2026	2010	2011	2016	2021	2026	2010	2011	2016	2021	2026
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	1	1	1	1	1	0	0	0	0	0	1	1	1	1	1
2	11	11	11	11	11	0	0	0	0	0	11	11	11	11	11
3	5	5	5	5	5	0	0	0	0	0	5	5	5	5	5
4	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
5	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
6	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
7	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
8	0	0	0	0	0	6	6	6	6	6	6	6	6	6	6
9	0	0	0	0	0	2	2	2	2	2	2	2	2	2	2
10	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
11	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
12	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
13	2	2	2	2	2	0	0	0	0	0	2	2	2	2	2
14	0	0	0	0	0	1	1	1	1	1	1	1	1	1	1
15	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
16	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

SOURCE: Household Survey, September 2008

TABLE 31
CONVENIENCE GOODS ALLOCATION - SPEND (£) 2008 PRICES

Catchment Zone	Waitrose					Other Stores in Whetstone					TOTAL				
	2010	2011	2016	2021	2026	2010	2011	2016	2021	2026	2010	2011	2016	2021	2026
	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)
1	440	444	483	496	510	0	0	0	0	0	440	444	483	496	510
2	7,417	7,499	7,892	8,188	8,569	0	0	0	0	0	7,417	7,499	7,892	8,188	8,569
3	5,890	5,907	6,168	6,285	6,507	0	0	0	0	0	5,890	5,907	6,168	6,285	6,507
4	144	150	183	192	183	0	0	0	0	0	144	150	183	192	183
5	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
6	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
7	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
8	0	0	0	0	0	4,395	4,412	4,662	4,851	5,389	4,395	4,412	4,662	4,851	5,389
9	0	0	0	0	0	1,671	1,745	2,052	2,124	2,334	1,671	1,745	2,052	2,124	2,334
10	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
11	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
12	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
13	978	989	1,063	1,110	1,150	0	0	0	0	0	978	989	1,063	1,110	1,150
14	0	0	0	0	0	491	497	532	556	574	491	497	532	556	574
15	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
16	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
TOTALS	**14,869**	**14,988**	**15,790**	**16,271**	**16,918**	**6,557**	**6,654**	**7,246**	**7,531**	**8,297**	**21,425**	**21,642**	**23,036**	**23,802**	**25,216**

SOURCE: Tables 3 & 30

LB BARNET
BOROUGH-WIDE TOWN CENTRES STUDY UPDATE 2010

HENDON CENTRAL DISTRICT CENTRE

TABLE 32
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

Catchment Zone	HENDON CENTRAL 2010 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)
1	0	0	0	0	0
2	0	0	0	0	0
3	0	0	0	0	0
4	0	0	0	0	0
5	0	0	0	0	0
6	0	0	0	0	0
7	0	0	0	0	0
8	0	0	0	0	0
9	0	0	0	0	0
10	1	1	1	1	1
11	0	0	0	0	0
12	0	0	0	0	0
13	0	0	0	0	0
14	0	0	0	0	0
15	0	0	0	0	0
16	0	0	0	0	0

SOURCE: Household Survey, September 2008

TABLE 33
CONVENIENCE GOODS ALLOCATION - SPEND (£) 2008 PRICES

Catchment Zone	HENDON CENTRAL 2010 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)
1	0	0	0	0	0
2	0	0	0	0	0
3	0	0	0	0	0
4	144	150	183	192	183
5	0	0	0	0	0
6	0	0	0	0	0
7	0	0	0	0	0
8	0	0	0	0	0
9	315	329	387	400	440
10	481	480	489	532	525
11	0	0	0	0	0
12	0	0	0	0	0
13	0	0	0	0	0
14	0	0	0	0	0
15	0	0	0	0	0
16	0	0	0	0	0
TOTALS	**939**	**958**	**1,059**	**1,125**	**1,147**

SOURCE: Tables 3 & 32

LB BARNET
BOROUGH-WIDE TOWN CENTRES STUDY UPDATE 2010

GOLDERS GREEN DISTRICT CENTRE

TABLE 34
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

Catchment Zone	Sainsburys					Tesco Express					Other Stores in Golders Green					TOTAL				
	2010	2011	2016	2021	2026	2010	2011	2016	2021	2026	2010	2011	2016	2021	2026	2010	2011	2016	2021	2026
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
2	0	0	0	0	0	2	2	2	2	2	0	0	0	0	0	2	2	2	2	2
3	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
4	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
5	0	0	0	0	0	0	0	0	0	0	1	1	1	1	1	1	1	1	1	1
6	0	0	0	0	0	1	1	1	1	1	0	0	0	0	0	1	1	1	1	1
7	3	3	3	3	3	1	1	1	1	1	0	0	0	0	0	4	4	4	4	4
8	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
10	9	9	9	9	9	3	3	3	3	3	3	3	3	3	3	14	14	14	14	14
11	2	2	2	2	2	0	0	0	0	0	0	0	0	0	0	2	2	2	2	2
12	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
13	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
14	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
15	7	7	7	7	7	1	1	1	1	1	0	0	0	0	0	8	8	8	8	8
16	5	5	5	5	5	0	0	0	0	0	0	0	0	0	0	5	5	5	5	5

SOURCE: Household Survey, September 2008

TABLE 35
CONVENIENCE GOODS ALLOCATION - SPEND (£) 2008 PRICES

Catchment Zone	Sainsburys					Tesco Express					Other Stores in Golders Green					TOTAL				
	2010	2011	2016	2021	2026	2010	2011	2016	2021	2026	2010	2011	2016	2021	2026	2010	2011	2016	2021	2026
	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)
1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
2	0	0	0	0	0	1,100	1,112	1,170	1,214	1,270	0	0	0	0	0	1,100	1,112	1,170	1,214	1,270
3	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
4	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
5	0	0	0	0	0	0	0	0	0	0	590	590	610	635	599	590	590	610	635	599
6	232	232	232	232	232	581	582	598	610	598	0	0	0	0	0	813	814	837	854	837
7	1,515	1,515	1,515	1,515	1,515	360	359	369	373	348	0	0	0	0	0	1,874	1,870	1,924	1,946	1,814
8	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
10	6,420	6,420	6,420	6,420	6,420	2,072	2,066	2,105	2,292	2,260	1,924	1,918	1,955	2,128	2,099	10,417	10,384	10,582	11,520	11,361
11	1,842	1,842	1,842	1,842	1,842	0	0	0	0	0	0	0	0	0	0	1,842	1,944	2,710	2,864	2,989
12	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
13	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
14	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
15	9,271	9,271	9,271	9,271	9,271	1,622	1,664	1,868	1,996	2,089	0	0	0	0	0	10,892	11,175	12,548	13,408	14,034
16	8,418	8,418	8,418	8,418	8,418	0	0	0	0	0	0	0	0	0	0	8,418	8,620	9,593	10,243	10,774
TOTALS	**27,698**	**27,698**	**27,698**	**27,698**	**27,698**	**5,734**	**5,781**	**6,110**	**6,485**	**6,565**	**2,514**	**2,508**	**2,565**	**2,763**	**2,697**	**35,947**	**36,509**	**39,975**	**42,685**	**43,678**

SOURCE: Tables 3 & 34

LOCAL CENTRES

TABLE 36
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

Catchment Zone	LOCAL CENTRES				
	2010	2011	2016	2021	2026
	(%)	(%)	(%)	(%)	(%)
1	0	0	0	0	0
2	2	2	2	2	2
3	2	2	2	2	2
4	0	0	0	0	0
5	0	0	0	0	0
6	0	0	0	0	0
7	1	1	1	1	1
8	0	0	0	0	0
9	0	0	0	0	0
10	1	1	1	1	1
11	0	0	0	0	0
12	0	0	0	0	0
13	0	0	0	0	0
14	0	0	0	0	0
15	0	0	0	0	0
16	1	1	1	1	1

SOURCE: Household Survey, September 2008

TABLE 37
CONVENIENCE GOODS ALLOCATION - SPEND (£) 2008 PRICES

Catchment Zone	LOCAL CENTRES				
	2010	2011	2016	2021	2026
	(£000)	(£000)	(£000)	(£000)	(£000)
1	176	178	193	198	204
2	1,326	1,341	1,411	1,464	1,532
3	2,046	2,052	2,143	2,183	2,261
4	0	0	0	0	0
5	0	0	0	0	0
6	0	0	0	0	0
7	283	283	291	294	274
8	0	0	0	0	0
9	0	0	0	0	0
10	481	480	489	532	525
11	347	366	510	539	563
12	0	0	0	0	0
13	0	0	0	0	0
14	0	0	0	0	0
15	458	470	528	564	590
16	2,429	2,487	2,768	2,956	3,109
TOTALS	**7,547**	**7,656**	**8,333**	**8,731**	**9,058**

SOURCE: Tables 3 & 36

TABLE 40
BRENT CROSS REGIONAL SHOPPING CENTRE CONVENIENCE GOODS FLOORSPACE

	Net Floorspace (sqm)	Net Convenience Ratio (%)	Net Convenience Floorspace (sqm)	Company Average Sales Density (£ per sq m net)	Total Potential Turnover (£000s)
TOWN CENTRE					
Waitrose	1,922	100%	1,922	11,869	22,812
M&S Food Hall	770	100%	770	11,686	8,998
SUB TOTAL	**2,692**		**2,692**	**11,817**	**31,810**

Source: IGD/LB Barnet/Experian Goad

TABLE 41
EDGWARE MAJOR CENTRE CONVENIENCE GOODS FLOORSPACE

	Net Floorspace (sqm)	Net Convenience Ratio (%)	Net Convenience Floorspace (sqm)	Company Average Sales Density (£ per sq m net)	Total Potential Turnover (£000s)
TOWN CENTRE					
Sainsbury's,The Broadwalk Centre	3,101	90%	2,791	9,990	27,881
M&S Food Hall, The Broadwalk Centre	1,645	100%	1,645	11,686	19,223
Other	3,064	100%	3,064	2,500	7,660
SUB TOTAL	**7,810**		**7,500**	**7,302**	**54,765**

Source: IGD/LB Barnet/Experian Goad

TABLE 42

BRENT STREET DISTRICT CENTRE CONVENIENCE GOODS FLOORSPACE

	Net Floorspace (sqm)	Net Convenience Ratio (%)	Net Convenience Floorspace (sqm)	Company Average Sales Density (£ per sq m net)	Total Potential Turnover (£000s)
TOWN CENTRE					
Tesco, Sentinel Square	677	100%	677	12,883	8,722
Other	1,385	100%	1,385	1,500	2,078
SUB TOTAL	**2,062**		**2,062**	**5,237**	**10,799**

Source: IGD/LB Barnet/Experian Goad

TABLE 43

CHIPPING BARNET DISTRICT CENTRE CONVENIENCE GOODS FLOORSPACE

	Net Floorspace (sqm)	Net Convenience Ratio (%)	Net Convenience Floorspace (sqm)	Company Average Sales Density (£ per sq m net)	Total Potential Turnover (£000s)
TOWN CENTRE					
Waitrose, The Spires Shopping Centre	1,505	100%	1,505	11,869	17,863
Other	2,152	100%	2,152	1,500	3,228
SUB TOTAL	**3,657**		**3,657**	**5,767**	**21,091**

Source: IGD/LB Barnet/Experian Goad

TABLE 44

CHURCH END, FINCHLEY DISTRICT CENTRE CONVENIENCE GOODS FLOORSPACE

	Net Floorspace (sqm)	Net Convenience Ratio (%)	Net Convenience Floorspace (sqm)	Company Average Sales Density (£ per sq m net)	Total Potential Turnover (£000s)
TOWN CENTRE					
Tesco, Ballards Lane	3,102	95%	2,947	12,883	37,965
Other	2,256	100%	2,256	1,500	3,384
SUB TOTAL	**5,358**		**5,203**	**7,947**	**41,349**

Source: IGD/LB Barnet/Experian Goad

TABLE 45

EAST FINCHLEY DISTRICT CENTRE CONVENIENCE GOODS FLOORSPACE

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

Source: IGD/LB Barnet/Experian Goad

TABLE 46

MILL HILL DISTRICT CENTRE CONVENIENCE GOODS FLOORSPACE

	Net Floorspace (sqm)	Net Convenience Ratio (%)	Net Convenience Floorspace (sqm)	Company Average Sales Density (£ per sq m net)	Total Potential Turnover (£000s)
TOWN CENTRE					
M&S, The Broadway	836	100%	836	11,686	9,769
Other	1,021	100%	1,021	1,500	1,532
SUB TOTAL	**1,857**		**1,857**	**6,086**	**11,301**

Source: IGD/LB Barnet/Experian Goad

TABLE 47

COLINDALE DISTRICT CENTRE CONVENIENCE GOODS FLOORSPACE

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

Source: IGD/LB Barnet/Experian Goad

TABLE 48

TEMPLE FORTUNE DISTRICT CENTRE CONVENIENCE GOODS FLOORSPACE

	Net Floorspace (sqm)	Net Convenience Ratio (%)	Net Convenience Floorspace (sqm)	Company Average Sales Density (£ per sq m net)	Total Potential Turnover (£000s)
TOWN CENTRE					
Waitrose, Finchley Road	1,880	100%	1,880	11,869	22,314
M&S, Finchley Road	836	100%	836	11,686	9,769
Other	1,690	100%	1,690	1,500	2,535
SUB TOTAL	**4,406**		**4,406**	**7,857**	**34,618**

Source: IGD/LB Barnet/Experian Goad

TABLE 49

BURNT OAK DISTRICT CENTRE CONVENIENCE GOODS FLOORSPACE

	Net Floorspace (sqm)	Net Convenience Ratio (%)	Net Convenience Floorspace (sqm)	Company Average Sales Density (£ per sq m net)	Total Potential Turnover (£000s)
TOWN CENTRE					
Tesco, Burnt Oak Broadway	1,092	95%	1,037	12,883	13,365
Other	3,715	100%	3,715	1,500	5,573
SUB TOTAL	**4,807**		**4,752**	**3,985**	**18,937**

Source: IGD/LB Barnet/Experian Goad

TABLE 50

CRICKLEWOOD DISTRICT CENTRE CONVENIENCE GOODS FLOORSPACE

	Net Floorspace (sqm)	Net Convenience Ratio (%)	Net Convenience Floorspace (sqm)	Company Average Sales Density (£ per sq m net)	Total Potential Turnover (£000s)
TOWN CENTRE					
Somerfield	753	100%	753	8,058	6,068
Other	4,766	100%	4,766	1,500	7,149
SUB TOTAL	**4,766**		**5,519**	**2,395**	**13,217**

Source: IGD/LB Barnet/Experian Goad

TABLE 51

NORTH FINCHLEY DISTRICT CENTRE CONVENIENCE GOODS FLOORSPACE

	Net Floorspace (sqm)	Net Convenience Ratio (%)	Net Convenience Floorspace (sqm)	Company Average Sales Density (£ per sq m net)	Total Potential Turnover (£000s)
TOWN CENTRE					
Sainsbury's, High Road	2,285	100%	2,285	9,990	22,827
Other	1,313	100%	1,313	1,500	1,970
SUB TOTAL	**3,598**		**3,598**	**6,892**	**24,797**

Source: IGD/LB Barnet/Experian Goad

TABLE 52

NEW BARNET DISTRICT CENTRE CONVENIENCE GOODS FLOORSPACE

	Net Floorspace (sqm)	Net Convenience Ratio (%)	Net Convenience Floorspace (sqm)	Company Average Sales Density (£ per sq m net)	Total Potential Turnover (£000s)
TOWN CENTRE					
Sainsbury's, East Barnet Road	2,955	90%	2,660	9,990	26,568
Other	286	100%	286	1,500	429
SUB TOTAL	**3,241**		**2,946**	**9,166**	**26,997**

Source: IGD/LB Barnet/Experian Goad

TABLE 53

WHETSTONE DISTRICT CENTRE CONVENIENCE GOODS FLOORSPACE

	Net Floorspace (sqm)	Net Convenience Ratio (%)	Net Convenience Floorspace (sqm)	Company Average Sales Density (£ per sq m net)	Total Potential Turnover (£000s)
TOWN CENTRE					
Waitrose, High Road	1,496	100%	1,496	11,869	17,756
Other	644	100%	644	1,500	966
SUB TOTAL	**2,140**		**2,140**	**8,749**	**18,722**

Source: IGD/LB Barnet/Experian Goad

TABLE 54

HENDON CENTRAL DISTRICT CENTRE CONVENIENCE GOODS FLOORSPACE

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

Source: IGD/LB Barnet/Experian Goad

TABLE 55

GOLDERS GREEN DISTRICT CENTRE CONVENIENCE GOODS FLOORSPACE

	Net Floorspace (sqm)	Net Convenience Ratio (%)	Net Convenience Floorspace (sqm)	Company Average Sales Density (£ per sq m net)	Total Potential Turnover (£000s)
TOWN CENTRE					
Sainsbury's, Finchley Road	1,260	100%	1,260	9,990	12,587
Tesco Express, Golders Green Road	262	100%	262	12,883	3,375
Other	1,580	100%	1,580	1,500	2,370
SUB TOTAL	**3,102**		**3,102**	**5,910**	**18,333**

Source: IGD/LB Barnet/Experian Goad

TABLE 56

LOCAL CENTRE CONVENIENCE GOODS FLOORSPACE

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

Source: IGD/LB Barnet/Experian Goad

TABLE 57

OUT OF CENTRE CONVENIENCE GOODS FLOORSPACE

	Net Floorspace (sqm)	Net Convenience Ratio (%)	Net Convenience Floorspace (sqm)	Company Average Sales Density (£ per sq m net)	Total Potential Turnover (£000s)
Lidl, Edgware Road, Cricklewood	741	100%	741		
M&S, High Road, Whetstone	836	100%	836	11,686	9,769
Sainsbury's, Hyde Estate Road	3,506	90%	3,155	9,990	31,522
Tesco, Brent Cross Retail Park, Cricklewood	3,681	75%	2,761	12,883	35,567
Tesco, Colney Hatch/North Circular Road	4,212	71%	3,007	12,883	38,739
Tesco Express East Barnet Road	233	100%	233	12,883	3,002
Waitrose, Ballards Lane, North Finchley	2,516	100%	2,516	11,869	29,862
Waitrose, Mill Hill East	1,685	100%	1,685	11,869	19,999
SUB TOTAL	**17,410**		**14,193**	**11,869**	**168,461**

Source: IGD/LB Barnet/Experian Goad

TABLE 58

TOTAL CONVENIENCE GOODS FLOORSPACE

	Net Floorspace (sqm)	Net Convenience Ratio (%)	Net Convenience Floorspace (sqm)	Company Average Sales Density (£ per sq m net)	Total Potential Turnover (£000s)
North	7,967		7,672	7,933	60,859
West	20,896		20,181	6,857	138,371
East	20,054		18,694	8,448	157,929
South West	11,139		12,740	6,534	83,246
South East	9,570		9,570	6,661	63,750
TOTAL	**69,626**		**68,856**	**7,322**	**504,156**

Source: IGD/LB Barnet/Experian Goad

LB BARNET
BOROUGH-WIDE TOWN CENTRES STUDY UPDATE 2010

TABLE 59
RETAIL CONVENIENCE COMMITMENTS

	Net Floorspace (sqm)	Status	Net Convenience Ratio (%)	Net Convenience (sqm)	Co Average Sales (£ per sq m net)	Average Turnover 2010 (£000s)	Average Turnover 2011 (£000s)	Average Turnover 2016 (£000s)	Average Turnover 2021 (£000s)	Average Turnover 2026 (£000s)
Extention to Tesco, Colney Hatch/North Circular Road	308	Completed	100%	308	3,000	924	929	952	976	1,001
Former Courts Unit, Staples Corner Retail Park, Edgware Road	402	Completed	100%	402	3,000	1,206	1,212	1,243	1,274	1,306
Grahame Park Estate, Lanacre Avenue	351	Not Started	100%	351	3,000	1,053	1,058	1,085	1,112	1,140
Unit 1C Brent Cross Shopping Centre	161	Completed	100%	161	3,000	482	484	496	509	521
NEW COMMITMENTS										
West Hendon Estate, West Hendon	750	Not Started	100%	750	3,000	2,250	2,261	2,318	2,377	2,437
Land at the former RAF East Camp Site, Aerodrome Road/Grahame Park Way, Hendon	400	Not Started	100%	400	3,000	1,199	1,204	1,235	1,266	1,298
204-206 Ballards Lane	408	Completed	100%	408	3,000	1,224	1,230	1,261	1,293	1,326
713 Finchley Road	370	Not Started	100%	370	3,000	1,110	1,116	1,144	1,173	1,202
Colindale Hospital, Colindale Avenue	45	Site cleared	100%	45	3,000	135	136	139	143	146
Land at Station House and part of Colindale Hospital, Colindale Avenue	390	Not Started	100%	390	3,000	1,170	1,176	1,206	1,236	1,267
1285 Finchley Road	329	Under Construction	100%	329	3,000	987	992	1,017	1,043	1,069
Tesco Express, Hale Lane, Edgware	494	Completed	100%	494	12,883	6,364	6,396	6,558	6,723	6,893
Tesco Express, 64-66 High Street, Barnet	208	Completed	100%	208	12,883	2,680	2,693	2,761	2,831	2,902
Sainsbury's Local, 146 High Street, Barnet	250	Completed	100%	250	9,990	2,494	2,506	2,569	2,634	2,701
Tesco Express, Beaufort Park, Unit 3, Block B	235	Completed	100%	235	12,883	3,031	3,047	3,123	3,202	3,283
Iceland, 43 The Broadway, Mill Hill	319	Completed	100%	319	6,244	1,989	1,999	2,049	2,101	2,154
Tesco Express, 7-11 Victoria Road, East Barnet	255	Completed	100%	255	12,883	3,283	3,299	3,382	3,468	3,555
TOTAL	**5,673**			**5,673**		**31,579**	**31,737**	**32,538**	**33,360**	**34,202**

Source: LB Barnet

LB BARNET
BOROUGH-WIDE TOWN CENTRES STUDY UPDATE 2010

TABLE 60
RETAIL PIPELINE - CONVENIENCE GOODS

	Net Floorspace (sqm)	Net Convenience Ratio (%)	Net Convenience (sqm)	Co Average Sales (£ per sqm net)	Total Turnover 2010 (£000s)	Total Turnover 2011 (£000s)	Total Turnover 2016 (£000s)	Total Turnover 2021 (£000s)	Total Turnover 2026 (£000s)
Brent Cross, Tesco Extra plus unit shops (Replacement Flsp Only)	7,380	70%	5,166	12,883	66,554	66,887	68,576	70,308	72,083
Mill Hill AAP	1,000	100%	1,000	2,500	2,500	2,513	2,576	2,641	2,708
Colindale AAP	1,114	100%	1,114	2,500	2,786	2,800	2,871	2,943	3,017
NEW PIPELINE DEVELOPMENTS									
Tesco Express, 7-9 Greenhill Parade, Great North Road,	370	100%	370	12,883	4,767	4,791	4,912	5,036	5,163
TOTAL	**9,864**		**7,650**		**76,607**	**76,990**	**78,934**	**80,927**	**82,971**

Source: LB Barnet

LB BARNET
BOROUGH-WIDE TOWN CENTRES STUDY UPDATE 201

CAPACITY PROJECTIONS: CONVENIENCE GOODS

TABLE 61
FUTURE SHOP GLOBAL FLOORSPACE CAPACITY FOR LB BARNET

GROWTH IN SALES PER SQ M	0.5 %pa '11-'26				
	CONVENIENCE GOODS				
	2010	2011	2016	2021	2026
Total Convenience Goods Turnover in LB Barnet (£000)	568,876	578,182	640,419	668,759	684,661
Existing Shop Floorspace (sqm net)	68,856	68,856	68,856	68,856	68,856
Sales per sqm net £	8,262	7,322	7,507	7,696	7,891
Sales from Existing Floorspace (£000)	568,876	504,156	516,886	529,938	543,320
Sales from Committed Floorspace (£000)	0	31,737	32,538	33,360	34,202
Residual Spending to Support new shops (£000)	0	42,290	90,994	105,460	107,138
Sales per sqm net in new shops (£) Based on large store format	10,000	10,050	10,304	10,564	10,831
Capacity for new floorspace (sqm net)	0	4,208	8,831	9,983	9,892

TABLE 62
FUTURE SHOP FLOORSPACE CAPACITY FOR NORTH SUB AREA

GROWTH IN SALES PER SQ M	0.5 %pa '11-'26				
	CONVENIENCE GOODS				
	2010	2011	2016	2021	2026
Total Convenience Goods Turnover in LB Barnet (£000)	85,475	86,387	92,557	95,530	98,534
Existing Shop Floorspace (sqm net)	7,672	7,672	7,672	7,672	7,672
Sales per sqm net £	11,142	7,933	8,134	8,339	8,549
Sales from Existing Floorspace (£000)	85,475	60,859	62,396	63,972	65,587
Sales from Committed Floorspace (£000)	0	14,894	15,270	15,656	16,051
Residual Spending to Support new shops (£000)	0	10,634	14,891	15,902	16,896
Sales per sqm net in new shops (£) Based on large store format	10,000	10,050	10,304	10,564	10,831
Capacity for new floorspace (sqm net)	0	1,058	1,445	1,505	1,560

TABLE 63
FUTURE SHOP FLOORSPACE CAPACITY FOR WEST SUB AREA

GROWTH IN SALES PER SQ M	0.5 %pa '11-'26				
	CONVENIENCE GOODS				
	2010	2011	2016	2021	2026
Total Convenience Goods Turnover in LB Barnet (£000)	144,582	148,646	173,426	181,853	191,407
Existing Shop Floorspace (sqm net)	20,181	20,181	20,181	20,181	20,181
Sales per sqm net £	7,164	6,857	7,030	7,207	7,389
Sales from Existing Floorspace (£000)	144,582	138,371	141,865	145,447	149,120
Sales from Committed Floorspace (£000)	0	8,619	8,837	9,060	9,289
Residual Spending to Support new shops (£000)	0	1,656	22,723	27,345	32,998
Sales per sqm net in new shops (£) Based on large store format	10,000	10,050	10,304	10,564	10,831
Capacity for new floorspace (sqm net)	0	165	2,205	2,589	3,047

TABLE 64
FUTURE SHOP FLOORSPACE CAPACITY FOR EAST SUB AREA

GROWTH IN SALES PER SQ M	0.5 %pa '11-'26				
	CONVENIENCE GOODS				
	2010	2011	2016	2021	2026
Total Convenience Goods Turnover in LB Barnet (£000)	216,102	218,199	234,357	242,805	243,713
Existing Shop Floorspace (sqm net)	18,694	18,694	18,694	18,694	18,694
Sales per sqm net £	11,560	8,448	8,661	8,880	9,104
Sales from Existing Floorspace (£000)	216,102	157,929	161,917	166,006	170,198
Sales from Committed Floorspace (£000)	0	2,159	2,213	2,269	2,326
Residual Spending to Support new shops (£000)	0	58,111	70,227	74,530	71,189
Sales per sqm net in new shops (£) Based on large store format	10,000	10,050	10,304	10,564	10,831
Capacity for new floorspace (sqm net)	0	5,782	6,816	7,055	6,573

TABLE 65
FUTURE SHOP FLOORSPACE CAPACITY FOR SOUTH EAST SUB AREA

GROWTH IN SALES PER SQ M	0.5 %pa '11-'26				
	CONVENIENCE GOODS				
	2010	2011	2016	2021	2026
Total Convenience Goods Turnover in LB Barnet (£000)	66,943	67,643	72,802	77,310	77,469
Existing Shop Floorspace (sqm net)	9,570	9,570	9,570	9,570	9,570
Sales per sqm net £	6,995	6,661	6,830	7,002	7,179
Sales from Existing Floorspace (£000)	66,943	63,750	65,360	67,010	68,703
Sales from Committed Floorspace (£000)	0	2,107	2,161	2,215	2,271
Residual Spending to Support new shops (£000)	0	1,785	5,281	8,084	6,495
Sales per sqm net in new shops (£) Based on large store format	10,000	10,050	10,304	10,564	10,831
Capacity for new floorspace (sqm net)	0	178	513	765	600

TABLE 66
FUTURE SHOP FLOORSPACE CAPACITY FOR SOUTH WEST SUB AREA

GROWTH IN SALES PER SQ M	0.5 %pa '11-'26				
	CONVENIENCE GOODS				
	2010	2011	2016	2021	2026
Total Convenience Goods Turnover in LB Barnet (£000)	55,773	57,307	67,277	71,261	73,537
Existing Shop Floorspace (sqm net)	12,740	12,740	12,740	12,740	12,740
Sales per sqm net £	4,378	6,534	6,699	6,869	7,042
Sales from Existing Floorspace (£000)	55,773	83,246	85,348	87,503	89,713
Sales from Committed Floorspace (£000)	0	3,957	4,057	4,160	4,265
Residual Spending to Support new shops (£000)	0	-29,896	-22,128	-20,402	-20,440
Sales per sqm net in new shops (£) Based on large store format	10,000	10,050	10,304	10,564	10,831
Capacity for new floorspace (sqm net)	0	-2,975	-2,148	-1,931	-1,887

LB BARNET
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CAPACITY PROJECTIONS: CONVENIENCE GOODS

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

GROWTH IN SALES PER SQ M	0.5 %pa '11-'26				
	CONVENIENCE GOODS				
	2010	2011	2016	2021	2026
Total Convenience Goods Turnover in LB Barnet (£000)	568,876	578,182	640,419	668,759	684,661
Existing Shop Floorspace (sqm net)	68,856	68,856	68,856	68,856	68,856
Sales per sqm net £	8,262	7,322	7,507	7,696	7,891
Sales from Existing Floorspace (£000)	568,876	504,156	516,886	529,938	543,320
Sales from Committed Floorspace (£000)	0	36,527	111,473	114,287	117,173
Residual Spending to Support new shops (£000)	0	37,499	12,060	24,533	24,168
Sales per sqm net in new shops (£) Based on large store format	10,000	10,050	10,304	10,564	10,831
Capacity for new floorspace (sqm net)	0	3,731	1,170	2,322	2,231

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

GROWTH IN SALES PER SQ M	0.5 %pa '11-'26				
	CONVENIENCE GOODS				
	2010	2011	2016	2021	2026
Total Convenience Goods Turnover in LB Barnet (£000)	85,475	86,387	92,557	95,530	98,534
Existing Shop Floorspace (sqm net)	7,672	7,672	7,672	7,672	7,672
Sales per sqm net £	11,142	7,933	8,134	8,339	8,549
Sales from Existing Floorspace (£000)	85,475	60,859	62,396	63,972	65,587
Sales from Committed Floorspace (£000)	0	19,685	20,182	20,691	21,214
Residual Spending to Support new shops (£000)	0	5,843	9,979	10,867	11,733
Sales per sqm net in new shops (£) Based on large store format	10,000	10,050	10,304	10,564	10,831
Capacity for new floorspace (sqm net)	0	581	969	1,029	1,083

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

GROWTH IN SALES PER SQ M	0.5 %pa '11-'26				
	CONVENIENCE GOODS				
	2010	2011	2016	2021	2026
Total Convenience Goods Turnover in LB Barnet (£000)	144,582	148,646	173,426	181,853	191,407
Existing Shop Floorspace (sqm net)	20,181	20,181	20,181	20,181	20,181
Sales per sqm net £	7,164	6,857	7,030	7,207	7,389
Sales from Existing Floorspace (£000)	144,582	138,371	141,865	145,447	149,120
Sales from Committed Floorspace (£000)	0	8,619	14,284	14,644	15,014
Residual Spending to Support new shops (£000)	0	1,656	17,277	21,762	27,273
Sales per sqm net in new shops (£) Based on large store format	10,000	10,050	10,304	10,564	10,831
Capacity for new floorspace (sqm net)	0	165	1,677	2,060	2,518

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

GROWTH IN SALES PER SQ M	0.5 %pa '11-'26				
	CONVENIENCE GOODS				
	2010	2011	2016	2021	2026
Total Convenience Goods Turnover in LB Barnet (£000)	216,102	218,199	234,357	242,805	243,713
Existing Shop Floorspace (sqm net)	18,694	18,694	18,694	18,694	18,694
Sales per sqm net £	11,560	8,448	8,661	8,880	9,104
Sales from Existing Floorspace (£000)	216,102	157,929	161,917	166,006	170,198
Sales from Committed Floorspace (£000)	0	2,159	2,213	2,269	2,326
Residual Spending to Support new shops (£000)	0	58,111	70,227	74,530	71,189
Sales per sqm net in new shops (£) Based on large store format	10,000	10,050	10,304	10,564	10,831
Capacity for new floorspace (sqm net)	0	5,782	6,816	7,055	6,573

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

GROWTH IN SALES PER SQ M	0.5 %pa '11-'26				
	CONVENIENCE GOODS				
	2010	2011	2016	2021	2026
Total Convenience Goods Turnover in LB Barnet (£000)	66,943	67,643	72,802	77,310	77,469
Existing Shop Floorspace (sqm net)	9,570	9,570	9,570	9,570	9,570
Sales per sqm net £	6,995	6,661	6,830	7,002	7,179
Sales from Existing Floorspace (£000)	66,943	63,750	65,360	67,010	68,703
Sales from Committed Floorspace (£000)	0	2,107	2,161	2,215	2,271
Residual Spending to Support new shops (£000)	0	1,785	5,281	8,084	6,495
Sales per sqm net in new shops (£) Based on large store format	10,000	10,050	10,304	10,564	10,831
Capacity for new floorspace (sqm net)	0	178	513	765	600

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

GROWTH IN SALES PER SQ M	0.5 %pa '11-'26				
	CONVENIENCE GOODS				
	2010	2011	2016	2021	2026
Total Convenience Goods Turnover in LB Barnet (£000)	55,773	57,307	67,277	71,261	73,537
Existing Shop Floorspace (sqm net)	12,740	12,740	12,740	12,740	12,740
Sales per sqm net £	4,378	6,534	6,699	6,869	7,042
Sales from Existing Floorspace (£000)	55,773	83,246	85,348	87,503	89,713
Sales from Committed Floorspace (£000)	0	3,957	72,633	74,467	76,348
Residual Spending to Support new shops (£000)	0	-29,896	-90,704	-90,710	-92,523
Sales per sqm net in new shops (£) Based on large store format	10,000	10,050	10,304	10,564	10,831
Capacity for new floorspace (sqm net)	0	-2,975	-8,803	-8,587	-8,543

APPENDIX 2

CAPACITY PROJECTIONS: COMPARISON GOODS

LB BARNET
BOROUGH-WIDE TOWN CENTRES STUDY UPDATE 2010

TABLE 1
SURVEY AREA POPULATION FORECASTS

Catchment Zone	Postcode Sector Groupings	2010	2011	2016	2021	2026
1	EN5 2/3/4/5	30,899	**31,023**	**32,232**	**32,361**	**32,588**
2	EN5 1, EN4 8/9, N20 8/9	37,145	**37,294**	**37,555**	**38,080**	**38,994**
3	N20 0, N11 1/2/3, N12 0/8/9	61,118	**60,874**	**60,813**	**60,569**	**61,357**
4	N12 7, NW7 1/2, NW4 1	24,915	**25,837**	**30,255**	**31,011**	**28,810**
5	N3, 1/2/3	26,146	**25,963**	**25,677**	**26,140**	**24,101**
6	N2 8/9, N10 1/2/3	39,687	**39,449**	**38,818**	**38,701**	**37,114**
7	N2 0, NW11 6, N6 4	20,892	**20,704**	**20,373**	**20,149**	**18,376**
8	NW7 3/4, HA8 7/8/9	40,468	**40,347**	**40,790**	**41,484**	**45,093**
9	HA8 0/5, NW9 0/5/6, NW4 4	60,052	**62,274**	**70,058**	**70,899**	**76,216**
10	NW4 2, NW3 7, NW11 0/7/8/9	37,052	**36,681**	**35,764**	**38,053**	**36,721**
11	NW4 3, NW2 1/6/7, NW9 7/8	51,207	**53,665**	**71,589**	**73,951**	**75,504**
12	WD6 1/2/3/4/5	35,789	36,096	37,579	39,141	40,566
13	EN4 0, N14 4/5/6/7	28,859	28,965	29,804	30,421	30,830
14	HA7 1/2/4, HA8 6, NW9 9	42,336	42,604	43,632	44,496	45,020
15	NW2 2/3/4/5, NW10 1, NW6 1/2/7, NW3 6	79,486	80,988	87,008	90,871	93,061
16	N6 5/6, N19 5, NW3 1/2/4/5, NW5 1/2	81,000	82,376	87,708	91,539	94,213
TOTAL		**697,051**	**705,138**	**749,656**	**767,868**	**778,564**

SOURCE: Experian Business Solutions, June 2010

TABLE 1A
POPULATION GROWTH RATES

2010-2011 (%)	2011-2016 (%)	2016-2021 (%)	2021-2026 (%)
0.4	3.9	0.4	0.7
0.4	0.7	1.4	2.4
-0.4	-0.1	-0.4	1.3
3.7	17.1	2.5	-7.1
-0.7	-1.1	1.8	-7.8
-0.6	-1.6	-0.3	-4.1
-0.9	-1.6	-1.1	-8.8
-0.3	1.1	1.7	8.7
3.7	12.5	1.2	7.5
-1.0	-2.5	6.4	-3.5
4.8	33.4	3.3	2.1
0.9	4.1	4.2	3.6
0.4	2.9	2.1	1.3
0.6	2.4	2.0	1.2
1.9	7.4	4.4	2.4
1.7	6.5	4.4	2.9
1.2	**6.3**	**2.4**	**1.4**

LB BARNET
BOROUGH-WIDE TOWN CENTRES STUDY UPDATE 2010

TABLE 2
COMPARISON GOODS RETAIL EXPENDITURE FORECASTS PER CAPITA (2008 PRICES)

Growth in Per Capita Expenditure:

2008 - 2009	**1.1% pa**
2009 - 2010	**-0.1% pa**
2010 - 2011	**1.4% pa**
2011 - 2016	**2.6% pa**
2016 - 2026	**4.7% pa**

ZONE	2008		2010		2011		2016		2021		2026	
		Minus SFT at 7.5%		Minus SFT at 9.1%		Minus SFT at 9.7%		Minus SFT at 11.5%		Minus SFT at 11.5%		Minus SFT at 11.5%
1	3,164	2,927	3,196	2,905	3,240	2,926	3,684	3,260	4,635	4,102	5,832	5,161
2	3,215	2,974	3,247	2,952	3,293	2,973	3,743	3,313	4,710	4,168	5,926	5,244
3	3,047	2,818	3,077	2,797	3,121	2,818	3,548	3,140	4,464	3,950	5,616	4,970
4	3,279	3,033	3,312	3,010	3,358	3,032	3,818	3,379	4,804	4,251	6,044	5,349
5	3,475	3,214	3,510	3,190	3,559	3,214	4,046	3,581	5,091	4,505	6,405	5,668
6	3,337	3,087	3,370	3,064	3,418	3,086	3,886	3,439	4,889	4,326	6,151	5,443
7	3,584	3,315	3,620	3,290	3,670	3,314	4,173	3,693	5,250	4,647	6,606	5,846
8	3,109	2,876	3,140	2,854	3,184	2,875	3,620	3,204	4,555	4,031	5,730	5,071
9	2,592	2,398	2,618	2,380	2,655	2,397	3,018	2,671	3,797	3,360	4,777	4,228
10	3,490	3,228	3,525	3,204	3,574	3,228	4,064	3,596	5,113	4,525	6,433	5,693
11	2,773	2,565	2,801	2,546	2,840	2,564	3,229	2,857	4,062	3,595	5,111	4,523
12	2,827	2,615	2,855	2,595	2,895	2,614	3,292	2,913	4,141	3,665	5,211	4,611
13	3,232	2,990	3,264	2,967	3,310	2,989	3,763	3,330	4,735	4,190	5,957	5,272
14	2,917	2,698	2,946	2,678	2,987	2,698	3,396	3,006	4,273	3,782	5,376	4,758
15	3,134	2,899	3,165	2,877	3,210	2,898	3,649	3,229	4,591	4,063	5,776	5,112
16	3,675	3,399	3,712	3,374	3,764	3,399	4,279	3,787	5,384	4,765	6,774	5,995

Source: Experian Business Strategies and Expenditure Data for LB Barnet

TABLE 3
SURVEY AREA COMPARISON GOODS RETAIL EXPENDITURE FORECASTS

ZONE	2010 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)
1	89,756	90,773	105,091	132,749	168,188
2	109,638	110,881	124,417	158,727	204,496
3	170,971	171,531	190,942	239,273	304,956
4	75,004	78,347	102,229	131,835	154,092
5	83,414	83,436	91,948	117,766	136,611
6	121,586	121,740	133,481	167,436	202,023
7	68,743	68,622	75,240	93,623	107,426
8	115,508	116,003	130,681	167,212	228,681
9	142,904	149,274	187,124	238,255	322,244
10	118,718	118,390	128,621	172,182	209,049
11	130,365	137,620	204,565	265,867	341,526
12	92,887	94,369	109,473	143,458	187,064
13	85,631	86,574	99,261	127,471	162,535
14	113,377	114,929	131,152	168,277	214,212
15	228,702	234,726	280,991	369,226	475,738
16	273,289	279,963	332,148	436,146	564,767
TOTAL	**2,020,494**	**2,057,178**	**2,427,364**	**3,129,504**	**3,983,607**

Source: Tables 1&2

BRENT CROSS REGIONAL SHOPPING CENTRE

TABLE 4
COMPARISON GOODS MARKET SHARE (%)

Catchment Zone	Brent Cross Regional Shopping Centre 2010 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)
1	18.9	18.9	18.9	18.9	18.9
2	16.9	16.9	16.9	16.9	16.9
3	24.4	24.4	24.4	24.4	24.4
4	45.4	45.4	45.4	45.4	45.4
5	41.1	41.1	41.1	41.1	41.1
6	24.1	24.1	24.1	24.1	24.1
7	41.1	41.1	41.1	41.1	41.1
8	34.0	34.0	34.0	34.0	34.0
9	26.3	26.3	26.3	26.3	26.3
10	45.6	45.6	45.6	45.6	45.6
11	44.3	44.3	44.3	44.3	44.3
12	5.4	5.4	5.4	5.4	5.4
13	22.4	22.4	22.4	22.4	22.4
14	19.9	19.9	19.9	19.9	19.9
15	27.2	27.2	27.2	27.2	27.2
16	15.8	15.8	15.8	15.8	15.8

TABLE 5
COMPARISON GOODS SPEND (£)

Catchment Zone	Brent Cross Regional Shopping Centre 2010 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)
1	17,003	17,196	19,908	25,147	31,861
2	18,546	18,756	21,046	26,849	34,591
3	41,776	41,913	46,655	58,465	74,514
4	34,039	35,557	46,395	59,831	69,932
5	34,269	34,278	37,775	48,382	56,124
6	29,333	29,370	32,202	40,394	48,738
7	28,264	28,214	30,935	38,493	44,168
8	39,265	39,433	44,423	56,841	77,736
9	37,569	39,243	49,194	62,636	84,716
10	54,171	54,021	58,690	78,567	95,389
11	57,756	60,971	90,629	117,788	151,308
12	4,984	5,064	5,874	7,698	10,038
13	19,141	19,351	22,187	28,493	36,331
14	22,614	22,924	26,159	33,564	42,726
15	62,126	63,763	76,331	100,299	129,233
16	43,245	44,301	52,558	69,015	89,368
Sub Total	**544,100**	**554,354**	**660,962**	**852,463**	**1,076,773**
Inflow	136,025	138,588	165,241	213,116	269,193
TOTAL	**680,125**	**692,942**	**826,203**	**1,065,579**	**1,345,967**

Source: Tables 3 & 4

EDGWARE MAJOR CENTRE

TABLE 6
COMPARISON GOODS MARKET SHARE (%)

Catchment Zone	Edgware Major Centre 2010 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)
1	0.4	0.4	0.4	0.4	0.4
2	0.0	0.0	0.0	0.0	0.0
3	0.0	0.0	0.0	0.0	0.0
4	1.6	1.6	1.6	1.6	1.6
5	0.2	0.2	0.2	0.2	0.2
6	0.0	0.0	0.0	0.0	0.0
7	0.3	0.3	0.3	0.3	0.3
8	14.2	14.2	14.2	14.2	14.2
9	10.3	10.3	10.3	10.3	10.3
10	1.1	1.1	1.1	1.1	1.1
11	1.6	1.6	1.6	1.6	1.6
12	1.0	1.0	1.0	1.0	1.0
13	0.0	0.0	0.0	0.0	0.0
14	7.2	7.2	7.2	7.2	7.2
15	0.4	0.4	0.4	0.4	0.4
16	0.5	0.5	0.5	0.5	0.5

TABLE 7
COMPARISON GOODS SPEND (£)

Catchment Zone	Edgware Major Centre 2010 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)
1	350	354	410	518	656
2	0	0	0	0	0
3	0	0	0	0	0
4	1,237	1,293	1,687	2,175	2,542
5	152	152	167	214	249
6	0	0	0	0	0
7	204	203	223	278	318
8	16,380	16,450	18,531	23,712	32,428
9	14,755	15,413	19,321	24,600	33,272
10	1,326	1,323	1,437	1,923	2,335
11	2,127	2,245	3,337	4,337	5,572
12	934	949	1,101	1,443	1,881
13	0	0	0	0	0
14	8,181	8,293	9,464	12,143	15,458
15	886	910	1,089	1,431	1,844
16	1,351	1,384	1,641	2,155	2,791
Total	**47,884**	**48,968**	**58,409**	**74,930**	**99,347**

Source: Tables 3 & 6

BRENT STREET DISTRICT CENTRE

TABLE 8
COMPARISON GOODS MARKET SHARE (%)

	Brent Street District Centre				
Catchment	2010	2011	2016	2021	2026
Zone	(%)	(%)	(%)	(%)	(%)
1	0.0	0.0	0.0	0.0	0.0
2	0.0	0.0	0.0	0.0	0.0
3	0.0	0.0	0.0	0.0	0.0
4	0.5	0.5	0.5	0.5	0.5
5	0.0	0.0	0.0	0.0	0.0
6	0.0	0.0	0.0	0.0	0.0
7	0.0	0.0	0.0	0.0	0.0
8	0.0	0.0	0.0	0.0	0.0
9	0.0	0.0	0.0	0.0	0.0
10	0.1	0.1	0.1	0.1	0.1
11	0.0	0.0	0.0	0.0	0.0
12	0.0	0.0	0.0	0.0	0.0
13	0.0	0.0	0.0	0.0	0.0
14	0.1	0.1	0.1	0.1	0.1
15	0.0	0.0	0.0	0.0	0.0
16	0.2	0.2	0.2	0.2	0.2

TABLE 9
COMPARISON GOODS SPEND (£)

	Brent Street District Centre				
Catchment	2010	2011	2016	2021	2026
Zone	(£000)	(£000)	(£000)	(£000)	(£000)
1	0	0	0	0	0
2	0	0	0	0	0
3	0	0	0	0	0
4	408	427	557	718	839
5	0	0	0	0	0
6	0	0	0	0	0
7	0	0	0	0	0
8	0	0	0	0	0
9	0	0	0	0	0
10	116	116	126	169	205
11	0	0	0	0	0
12	0	0	0	0	0
13	0	0	0	0	0
14	104	105	120	154	197
15	0	0	0	0	0
16	678	694	824	1,082	1,401
Total	**1,307**	**1,343**	**1,627**	**2,123**	**2,641**

Source: Tables 3 & 8

CHIPPING BARNET DISTRICT CENTRE

TABLE 10
COMPARISON GOODS MARKET SHARE (%)

Catchment Zone	Chipping Barnet District Centre 2010 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)
1	11.7	11.7	11.7	11.7	11.7
2	6.0	6.0	6.0	6.0	6.0
3	0.8	0.8	0.8	0.8	0.8
4	0.3	0.3	0.3	0.3	0.3
5	0.0	0.0	0.0	0.0	0.0
6	0.3	0.3	0.3	0.3	0.3
7	0.3	0.3	0.3	0.3	0.3
8	0.0	0.0	0.0	0.0	0.0
9	0.0	0.0	0.0	0.0	0.0
10	0.0	0.0	0.0	0.0	0.0
11	0.0	0.0	0.0	0.0	0.0
12	0.1	0.1	0.1	0.1	0.1
13	0.7	0.7	0.7	0.7	0.7
14	0.0	0.0	0.0	0.0	0.0
15	0.0	0.0	0.0	0.0	0.0
16	0.0	0.0	0.0	0.0	0.0

TABLE 11
COMPARISON GOODS SPEND (£)

Catchment Zone	Chipping Barnet District Centre 2010 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)
1	10,512	10,631	12,308	15,547	19,698
2	6,621	6,696	7,513	9,585	12,349
3	1,400	1,404	1,563	1,959	2,497
4	222	232	303	391	457
5	0	0	0	0	0
6	344	344	377	473	571
7	230	229	252	313	359
8	0	0	0	0	0
9	0	0	0	0	0
10	0	0	0	0	0
11	0	0	0	0	0
12	133	135	157	205	267
13	604	611	701	900	1,147
14	0	0	0	0	0
15	0	0	0	0	0
16	0	0	0	0	0
Total	**20,065**	**20,283**	**23,173**	**29,373**	**37,345**

Source: Tables 3 & 10

LB BARNET
BOROUGH-WIDE TOWN CENTRES STUDY UPDATE 2010

CHURCH END, FINCHLEY DISTRICT CENTRE

TABLE 12
COMPARISON GOODS MARKET SHARE (%)

Catchment Zone	Church End, Finchley District Centre 2010 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)
1	0.0	0.0	0.0	0.0	0.0
2	0.1	0.1	0.1	0.1	0.1
3	0.0	0.0	0.0	0.0	0.0
4	0.1	0.1	0.1	0.1	0.1
5	1.2	1.2	1.2	1.2	1.2
6	0.3	0.3	0.3	0.3	0.3
7	0.3	0.3	0.3	0.3	0.3
8	0.0	0.0	0.0	0.0	0.0
9	0.0	0.0	0.0	0.0	0.0
10	0.3	0.3	0.3	0.3	0.3
11	0.0	0.0	0.0	0.0	0.0
12	0.0	0.0	0.0	0.0	0.0
13	0.1	0.1	0.1	0.1	0.1
14	0.4	0.4	0.4	0.4	0.4
15	0.0	0.0	0.0	0.0	0.0
16	0.5	0.5	0.5	0.5	0.5

TABLE 13
COMPARISON GOODS SPEND (£)

Catchment Zone	Church End, Finchley District Centre 2010 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)
1	0	0	0	0	0
2	87	88	99	126	163
3	0	0	0	0	0
4	64	67	88	113	132
5	1,007	1,008	1,110	1,422	1,650
6	334	335	367	460	556
7	179	179	196	244	280
8	0	0	0	0	0
9	0	0	0	0	0
10	352	351	381	510	620
11	0	0	0	0	0
12	0	0	0	0	0
13	73	74	85	109	139
14	411	416	475	610	776
15	0	0	0	0	0
16	1,351	1,384	1,641	2,155	2,791
Total	**3,859**	**3,902**	**4,443**	**5,751**	**7,106**

Source: Tables 3 & 12

EAST FINCHLEY DISTRICT CENTRE

TABLE 14
COMPARISON GOODS MARKET SHARE (%)

	East Finchley District Centre				
Catchment Zone	2010 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)
1	0.2	0.2	0.2	0.2	0.2
2	0.2	0.2	0.2	0.2	0.2
3	0.4	0.4	0.4	0.4	0.4
4	0.3	0.3	0.3	0.3	0.3
5	1.7	1.7	1.7	1.7	1.7
6	2.5	2.5	2.5	2.5	2.5
7	1.8	1.8	1.8	1.8	1.8
8	0.0	0.0	0.0	0.0	0.0
9	0.0	0.0	0.0	0.0	0.0
10	0.1	0.1	0.1	0.1	0.1
11	0.2	0.2	0.2	0.2	0.2
12	0.0	0.0	0.0	0.0	0.0
13	0.0	0.0	0.0	0.0	0.0
14	0.0	0.0	0.0	0.0	0.0
15	0.6	0.6	0.6	0.6	0.6
16	0.7	0.7	0.7	0.7	0.7

TABLE 15
COMPARISON GOODS SPEND (£)

	East Finchley District Centre				
Catchment Zone	2010 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)
1	152	153	178	224	284
2	249	252	283	361	465
3	632	634	706	885	1,128
4	222	232	303	391	457
5	1,419	1,419	1,564	2,003	2,324
6	3,088	3,092	3,390	4,253	5,131
7	1,247	1,244	1,364	1,698	1,948
8	0	0	0	0	0
9	0	0	0	0	0
10	116	116	126	169	205
11	254	268	399	518	666
12	0	0	0	0	0
13	0	0	0	0	0
14	0	0	0	0	0
15	1,270	1,304	1,561	2,051	2,642
16	1,947	1,995	2,367	3,108	4,024
Total	**10,597**	**10,711**	**12,241**	**15,660**	**19,274**

Source: Tables 3 & 14

MILL HILL DISTRICT CENTRE

TABLE 16
COMPARISON GOODS MARKET SHARE (%)

Catchment Zone	Mill Hill District Centre 2010 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)
1	0.9	0.9	0.9	0.9	0.9
2	0.2	0.2	0.2	0.2	0.2
3	0.3	0.3	0.3	0.3	0.3
4	4.5	4.5	4.5	4.5	4.5
5	0.5	0.5	0.5	0.5	0.5
6	0.0	0.0	0.0	0.0	0.0
7	0.3	0.3	0.3	0.3	0.3
8	5.8	5.8	5.8	5.8	5.8
9	3.5	3.5	3.5	3.5	3.5
10	0.9	0.9	0.9	0.9	0.9
11	1.4	1.4	1.4	1.4	1.4
12	0.6	0.6	0.6	0.6	0.6
13	0.0	0.0	0.0	0.0	0.0
14	0.3	0.3	0.3	0.3	0.3
15	0.7	0.7	0.7	0.7	0.7
16	0.0	0.0	0.0	0.0	0.0

TABLE 17
COMPARISON GOODS SPEND (£)

Catchment Zone	Mill Hill District Centre 2010 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)
1	828	837	969	1,224	1,551
2	185	187	210	268	346
3	483	485	540	676	862
4	3,355	3,504	4,573	5,897	6,892
5	417	417	459	588	682
6	0	0	0	0	0
7	235	235	257	320	367
8	6,723	6,751	7,606	9,732	13,309
9	4,939	5,159	6,468	8,235	11,138
10	1,107	1,104	1,199	1,605	1,949
11	1,881	1,986	2,952	3,836	4,928
12	525	533	618	810	1,057
13	0	0	0	0	0
14	344	349	398	511	651
15	1,572	1,613	1,931	2,538	3,270
16	0	0	0	0	0
Total	**22,593**	**23,161**	**28,180**	**36,241**	**47,002**

Source: Tables 3 & 16

COLINDALE DISTRICT CENTRE

TABLE 18
COMPARISON GOODS MARKET SHARE (%)

Catchment Zone	Colindale District Centre 2010 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)
1	0.0	0.0	0.0	0.0	0.0
2	0.0	0.0	0.0	0.0	0.0
3	0.0	0.0	0.0	0.0	0.0
4	0.7	0.7	0.7	0.7	0.7
5	0.0	0.0	0.0	0.0	0.0
6	0.0	0.0	0.0	0.0	0.0
7	0.0	0.0	0.0	0.0	0.0
8	0.0	0.0	0.0	0.0	0.0
9	1.7	1.7	1.7	1.7	1.7
10	0.0	0.0	0.0	0.0	0.0
11	1.4	1.4	1.4	1.4	1.4
12	0.0	0.0	0.0	0.0	0.0
13	0.0	0.0	0.0	0.0	0.0
14	0.7	0.7	0.7	0.7	0.7
15	0.0	0.0	0.0	0.0	0.0
16	0.0	0.0	0.0	0.0	0.0

TABLE 19
COMPARISON GOODS SPEND (£)

Catchment Zone	Colindale District Centre 2010 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)
1	0	0	0	0	0
2	0	0	0	0	0
3	0	0	0	0	0
4	515	538	702	905	1,058
5	0	0	0	0	0
6	0	0	0	0	0
7	0	0	0	0	0
8	0	0	0	0	0
9	2,402	2,509	3,145	4,004	5,416
10	0	0	0	0	0
11	1,846	1,949	2,897	3,765	4,836
12	0	0	0	0	0
13	0	0	0	0	0
14	747	757	864	1,109	1,411
15	0	0	0	0	0
16	0	0	0	0	0
Total	**5,510**	**5,753**	**7,608**	**9,783**	**12,722**

Source: Tables 3 & 18

TEMPLE FORTUNE DISTRICT CENTRE

TABLE 20
COMPARISON GOODS MARKET SHARE (%)

	Temple Fortune District Centre				
Catchment Zone	2010 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)
1	0.0	0.0	0.0	0.0	0.0
2	0.0	0.0	0.0	0.0	0.0
3	0.0	0.0	0.0	0.0	0.0
4	0.0	0.0	0.0	0.0	0.0
5	0.0	0.0	0.0	0.0	0.0
6	0.0	0.0	0.0	0.0	0.0
7	3.7	3.7	3.7	3.7	3.7
8	0.0	0.0	0.0	0.0	0.0
9	0.0	0.0	0.0	0.0	0.0
10	1.6	1.6	1.6	1.6	1.6
11	0.0	0.0	0.0	0.0	0.0
12	0.0	0.0	0.0	0.0	0.0
13	0.0	0.0	0.0	0.0	0.0
14	0.0	0.0	0.0	0.0	0.0
15	0.0	0.0	0.0	0.0	0.0
16	0.0	0.0	0.0	0.0	0.0

TABLE 21
COMPARISON GOODS SPEND (£)

	Temple Fortune District Centre				
Catchment Zone	2010 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)
1	0	0	0	0	0
2	0	0	0	0	0
3	0	0	0	0	0
4	0	0	0	0	0
5	0	0	0	0	0
6	0	0	0	0	0
7	2,576	2,572	2,820	3,509	4,026
8	0	0	0	0	0
9	0	0	0	0	0
10	1,951	1,946	2,114	2,830	3,436
11	0	0	0	0	0
12	0	0	0	0	0
13	0	0	0	0	0
14	0	0	0	0	0
15	0	0	0	0	0
16	0	0	0	0	0
Total	**4,528**	**4,518**	**4,934**	**6,339**	**7,463**

Source: Tables 3 & 18

BURNT OAK DISTRICT CENTRE

TABLE 22
COMPARISON GOODS MARKET SHARE (%)

	Burnt Oak District Centre				
Catchment Zone	2010 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)
1	0.0	0.0	0.0	0.0	0.0
2	0.0	0.0	0.0	0.0	0.0
3	0.0	0.0	0.0	0.0	0.0
4	0.0	0.0	0.0	0.0	0.0
5	0.0	0.0	0.0	0.0	0.0
6	0.0	0.0	0.0	0.0	0.0
7	0.3	0.3	0.3	0.3	0.3
8	0.3	0.3	0.3	0.3	0.3
9	2.9	2.9	2.9	2.9	2.9
10	0.6	0.6	0.6	0.6	0.6
11	0.5	0.5	0.5	0.5	0.5
12	0.2	0.2	0.2	0.2	0.2
13	0.0	0.0	0.0	0.0	0.0
14	0.0	0.0	0.0	0.0	0.0
15	0.0	0.0	0.0	0.0	0.0
16	0.0	0.0	0.0	0.0	0.0

TABLE 23
COMPARISON GOODS SPEND (£)

	Burnt Oak District Centre				
Catchment Zone	2010 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)
1	0	0	0	0	0
2	0	0	0	0	0
3	0	0	0	0	0
4	0	0	0	0	0
5	0	0	0	0	0
6	0	0	0	0	0
7	204	203	223	278	318
8	311	313	352	451	616
9	4,122	4,305	5,397	6,872	9,294
10	672	670	728	974	1,183
11	677	715	1,062	1,381	1,774
12	202	205	238	311	406
13	0	0	0	0	0
14	0	0	0	0	0
15	0	0	0	0	0
16	0	0	0	0	0
Total	**6,187**	**6,411**	**8,000**	**10,266**	**13,591**

Source: Tables 3 & 20

CRICKLEWOOD DISTRICT CENTRE

TABLE 24
COMPARISON GOODS MARKET SHARE (%)

	Cricklewood District Centre				
Catchment Zone	2010 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)
1	0.0	0.0	0.0	0.0	0.0
2	0.1	0.1	0.1	0.1	0.1
3	0.0	0.0	0.0	0.0	0.0
4	0.3	0.3	0.3	0.3	0.3
5	0.0	0.0	0.0	0.0	0.0
6	0.0	0.0	0.0	0.0	0.0
7	1.0	1.0	1.0	1.0	1.0
8	0.0	0.0	0.0	0.0	0.0
9	0.0	0.0	0.0	0.0	0.0
10	0.4	0.4	0.4	0.4	0.4
11	5.3	5.3	5.3	5.3	5.3
12	0.0	0.0	0.0	0.0	0.0
13	0.0	0.0	0.0	0.0	0.0
14	0.6	0.6	0.6	0.6	0.6
15	1.8	1.8	1.8	1.8	1.8
16	0.0	0.0	0.0	0.0	0.0

TABLE 25
COMPARISON GOODS SPEND (£)

	Cricklewood District Centre				
Catchment Zone	2010 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)
1	0	0	0	0	0
2	162	164	184	235	302
3	0	0	0	0	0
4	246	256	335	432	504
5	0	0	0	0	0
6	0	0	0	0	0
7	654	653	716	890	1,022
8	0	0	0	0	0
9	0	0	0	0	0
10	424	423	460	616	747
11	6,847	7,228	10,744	13,964	17,937
12	0	0	0	0	0
13	0	0	0	0	0
14	643	652	744	955	1,215
15	4,124	4,232	5,067	6,658	8,578
16	0	0	0	0	0
Total	**13,100**	**13,609**	**18,249**	**23,748**	**30,307**

Source: Tables 3 & 22

NORTH FINCHLEY DISTRICT CENTRE

TABLE 26
COMPARISON GOODS MARKET SHARE (%)

	North Finchley District Centre				
Catchment Zone	2010 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)
1	3.0	3.0	3.0	3.0	3.0
2	4.6	4.6	4.6	4.6	4.6
3	13.4	13.4	13.4	13.4	13.4
4	6.5	6.5	6.5	6.5	6.5
5	9.9	9.9	9.9	9.9	9.9
6	5.0	5.0	5.0	5.0	5.0
7	4.1	4.1	4.1	4.1	4.1
8	0.4	0.4	0.4	0.4	0.4
9	1.7	1.7	1.7	1.7	1.7
10	1.0	1.0	1.0	1.0	1.0
11	0.0	0.0	0.0	0.0	0.0
12	0.0	0.0	0.0	0.0	0.0
13	0.8	0.8	0.8	0.8	0.8
14	0.0	0.0	0.0	0.0	0.0
15	0.6	0.6	0.6	0.6	0.6
16	2.1	2.1	2.1	2.1	2.1

TABLE 27
COMPARISON GOODS SPEND (£)

	North Finchley District Centre				
Catchment Zone	2010 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)
1	2,653	2,683	3,107	3,924	4,972
2	5,025	5,082	5,702	7,275	9,372
3	22,968	23,043	25,650	32,143	40,967
4	4,879	5,097	6,650	8,576	10,024
5	8,248	8,250	9,091	11,644	13,507
6	6,030	6,038	6,620	8,304	10,019
7	2,810	2,805	3,075	3,826	4,391
8	418	420	473	606	829
9	2,420	2,527	3,168	4,034	5,456
10	1,193	1,190	1,293	1,731	2,101
11	0	0	0	0	0
12	0	0	0	0	0
13	722	730	837	1,075	1,371
14	0	0	0	0	0
15	1,353	1,389	1,663	2,185	2,815
16	5,792	5,934	7,040	9,244	11,970
Total	**64,511**	**65,187**	**74,370**	**94,567**	**117,794**

Source: Tables 3 & 24

NEW BARNET DISTRICT CENTRE

TABLE 28
COMPARISON GOODS MARKET SHARE (%)

Catchment Zone	New Barnet District Centre 2010 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)
1	0.0	0.0	0.0	0.0	0.0
2	1.4	1.4	1.4	1.4	1.4
3	0.5	0.5	0.5	0.5	0.5
4	0.5	0.5	0.5	0.5	0.5
5	0.0	0.0	0.0	0.0	0.0
6	1.0	1.0	1.0	1.0	1.0
7	0.7	0.7	0.7	0.7	0.7
8	0.0	0.0	0.0	0.0	0.0
9	0.1	0.1	0.1	0.1	0.1
10	0.2	0.2	0.2	0.2	0.2
11	0.5	0.5	0.5	0.5	0.5
12	0.0	0.0	0.0	0.0	0.0
13	0.7	0.7	0.7	0.7	0.7
14	0.0	0.0	0.0	0.0	0.0
15	0.0	0.0	0.0	0.0	0.0
16	0.0	0.0	0.0	0.0	0.0

TABLE 29
COMPARISON GOODS SPEND (£)

Catchment Zone	New Barnet District Centre 2010 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)
1	0	0	0	0	0
2	1,560	1,578	1,770	2,259	2,910
3	828	831	925	1,159	1,477
4	360	377	491	634	741
5	0	0	0	0	0
6	1,212	1,214	1,331	1,669	2,014
7	480	479	525	653	750
8	0	0	0	0	0
9	196	205	257	327	442
10	239	239	259	347	421
11	614	648	964	1,253	1,609
12	0	0	0	0	0
13	604	611	701	900	1,147
14	0	0	0	0	0
15	0	0	0	0	0
16	0	0	0	0	0
Total	**6,095**	**6,181**	**7,223**	**9,200**	**11,511**

Source: Tables 3 & 26

WHETSTONE DISTRICT CENTRE

TABLE 30
COMPARISON GOODS MARKET SHARE (%)

Catchment Zone	Whetstone District Centre 2010 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)
1	1.4	1.4	1.4	1.4	1.4
2	1.8	1.8	1.8	1.8	1.8
3	1.5	1.5	1.5	1.5	1.5
4	1.0	1.0	1.0	1.0	1.0
5	0.2	0.2	0.2	0.2	0.2
6	0.5	0.5	0.5	0.5	0.5
7	0.0	0.0	0.0	0.0	0.0
8	0.2	0.2	0.2	0.2	0.2
9	0.0	0.0	0.0	0.0	0.0
10	0.0	0.0	0.0	0.0	0.0
11	0.0	0.0	0.0	0.0	0.0
12	0.0	0.0	0.0	0.0	0.0
13	0.0	0.0	0.0	0.0	0.0
14	0.2	0.2	0.2	0.2	0.2
15	0.0	0.0	0.0	0.0	0.0
16	0.0	0.0	0.0	0.0	0.0

TABLE 31
COMPARISON GOODS SPEND (£)

Catchment Zone	Whetstone District Centre 2010 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)
1	1,295	1,309	1,516	1,915	2,426
2	1,924	1,946	2,183	2,786	3,589
3	2,543	2,552	2,840	3,559	4,536
4	771	806	1,051	1,356	1,585
5	194	194	214	274	318
6	595	595	653	819	988
7	0	0	0	0	0
8	180	181	204	261	357
9	0	0	0	0	0
10	0	0	0	0	0
11	0	0	0	0	0
12	0	0	0	0	0
13	0	0	0	0	0
14	177	179	205	262	334
15	0	0	0	0	0
16	0	0	0	0	0
Total	**7,679**	**7,762**	**8,866**	**11,232**	**14,132**

Source: Tables 3 & 28

HENDON CENTRAL DISTRICT CENTRE

TABLE 32
COMPARISON GOODS MARKET SHARE (%)

	Hendon Central District Centre				
Catchment Zone	2010 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)
1	0.0	0.0	0.0	0.0	0.0
2	0.0	0.0	0.0	0.0	0.0
3	0.0	0.0	0.0	0.0	0.0
4	1.1	1.1	1.1	1.1	1.1
5	0.0	0.0	0.0	0.0	0.0
6	0.0	0.0	0.0	0.0	0.0
7	0.0	0.0	0.0	0.0	0.0
8	0.8	0.8	0.8	0.8	0.8
9	1.1	1.1	1.1	1.1	1.1
10	1.2	1.2	1.2	1.2	1.2
11	5.7	5.7	5.7	5.7	5.7
12	0.0	0.0	0.0	0.0	0.0
13	0.0	0.0	0.0	0.0	0.0
14	0.2	0.2	0.2	0.2	0.2
15	0.0	0.0	0.0	0.0	0.0
16	0.0	0.0	0.0	0.0	0.0

TABLE 33
COMPARISON GOODS SPEND (£)

	Hendon Central District Centre				
Catchment Zone	2010 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)
1	0	0	0	0	0
2	0	0	0	0	0
3	0	0	0	0	0
4	814	850	1,109	1,430	1,672
5	0	0	0	0	0
6	0	0	0	0	0
7	0	0	0	0	0
8	952	956	1,077	1,378	1,885
9	1,525	1,593	1,997	2,542	3,438
10	1,422	1,418	1,541	2,063	2,504
11	7,382	7,792	11,583	15,054	19,338
12	0	0	0	0	0
13	0	0	0	0	0
14	272	275	314	403	513
15	0	0	0	0	0
16	0	0	0	0	0
Total	**12,366**	**12,885**	**17,621**	**22,871**	**29,351**

Source: Tables 3 & 30

GOLDERS GREEN DISTRICT CENTRE

TABLE 34
COMPARISON GOODS MARKET SHARE (%)

Catchment Zone	Golders Green District Centre 2010 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)
1	0.0	0.0	0.0	0.0	0.0
2	0.0	0.0	0.0	0.0	0.0
3	0.0	0.0	0.0	0.0	0.0
4	0.3	0.3	0.3	0.3	0.3
5	0.0	0.0	0.0	0.0	0.0
6	0.0	0.0	0.0	0.0	0.0
7	0.3	0.3	0.3	0.3	0.3
8	0.3	0.3	0.3	0.3	0.3
9	0.4	0.4	0.4	0.4	0.4
10	2.1	2.1	2.1	2.1	2.1
11	0.0	0.0	0.0	0.0	0.0
12	0.0	0.0	0.0	0.0	0.0
13	0.0	0.0	0.0	0.0	0.0
14	0.0	0.0	0.0	0.0	0.0
15	0.4	0.4	0.4	0.4	0.4
16	0.0	0.0	0.0	0.0	0.0

TABLE 35
COMPARISON GOODS SPEND (£)

Catchment Zone	Golders Green District Centre 2010 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)
1	0	0	0	0	0
2	0	0	0	0	0
3	0	0	0	0	0
4	222	232	303	391	457
5	0	0	0	0	0
6	0	0	0	0	0
7	230	229	252	313	359
8	311	313	352	451	616
9	518	541	678	863	1,167
10	2,507	2,500	2,716	3,636	4,414
11	0	0	0	0	0
12	0	0	0	0	0
13	0	0	0	0	0
14	0	0	0	0	0
15	892	916	1,096	1,441	1,856
16	0	0	0	0	0
Total	**4,680**	**4,731**	**5,397**	**7,094**	**8,870**

Source: Tables 3 & 32

OUT OF CENTRE

TABLE 36
COMPARISON GOODS MARKET SHARE (%)

Catchment Zone	Friern Bridge Retail Park 2010 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)
1	2.6	2.6	2.6	2.6	2.6
2	5.3	5.3	5.3	5.3	5.3
3	6.5	6.5	6.5	6.5	6.5
4	0.9	0.9	0.9	0.9	0.9
5	1.9	1.9	1.9	1.9	1.9
6	4.9	4.9	4.9	4.9	4.9
7	1.8	1.8	1.8	1.8	1.8
8	0.3	0.3	0.3	0.3	0.3
9	0.4	0.4	0.4	0.4	0.4
10	0.4	0.4	0.4	0.4	0.4
11	0.0	0.0	0.0	0.0	0.0
12	0.0	0.0	0.0	0.0	0.0
13	1.4	1.4	1.4	1.4	1.4
14	0.6	0.6	0.6	0.6	0.6
15	0.5	0.5	0.5	0.5	0.5
16	0.8	0.8	0.8	0.8	0.8

TABLE 37
COMPARISON GOODS SPEND (£)

Catchment Zone	Friern Bridge Retail Park 2010 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)
1	2,343	2,369	2,743	3,465	4,390
2	5,855	5,921	6,644	8,477	10,921
3	11,191	11,227	12,498	15,661	19,961
4	666	695	907	1,170	1,367
5	1,554	1,555	1,713	2,194	2,545
6	5,926	5,934	6,506	8,161	9,846
7	1,208	1,205	1,322	1,645	1,887
8	318	319	359	460	629
9	619	646	810	1,032	1,395
10	424	423	460	616	747
11	0	0	0	0	0
12	0	0	0	0	0
13	1,216	1,230	1,410	1,810	2,308
14	643	652	744	955	1,215
15	1,225	1,258	1,505	1,978	2,549
16	2,099	2,150	2,551	3,349	4,337
Sub Total	35,286	35,585	40,173	50,972	64,099
Inflow	11,762	11,862	13,391	16,991	21,366
TOTAL	47,048	47,446	53,564	67,963	85,465

Source: Tables 3 & 32

TABLE 38
COMPARISON GOODS MARKET SHARE (%)

Catchment Zone	Stapes Corner Retail Park 2010 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)
1	0.0	0.0	0.0	0.0	0.0
2	0.1	0.1	0.1	0.1	0.1
3	0.0	0.0	0.0	0.0	0.0
4	0.2	0.2	0.2	0.2	0.2
5	0.4	0.4	0.4	0.4	0.4
6	0.0	0.0	0.0	0.0	0.0
7	0.3	0.3	0.3	0.3	0.3
8	0.3	0.3	0.3	0.3	0.3
9	1.0	1.0	1.0	1.0	1.0
10	1.5	1.5	1.5	1.5	1.5
11	0.8	0.8	0.8	0.8	0.8
12	0.1	0.1	0.1	0.1	0.1
13	0.0	0.0	0.0	0.0	0.0
14	0.0	0.0	0.0	0.0	0.0
15	1.3	1.3	1.3	1.3	1.3
16	0.6	0.6	0.6	0.6	0.6

TABLE 39
COMPARISON GOODS SPEND (£)

Catchment Zone	Stapes Corner Retail Park 2010 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)
1	0	0	0	0	0
2	162	164	184	235	302
3	0	0	0	0	0
4	119	124	162	209	244
5	346	346	381	488	566
6	0	0	0	0	0
7	225	225	246	306	352
8	327	328	369	473	646
9	1,367	1,428	1,790	2,279	3,082
10	1,795	1,790	1,944	2,603	3,160
11	1,070	1,129	1,678	2,181	2,802
12	127	130	150	197	257
13	0	0	0	0	0
14	0	0	0	0	0
15	2,922	2,999	3,590	4,718	6,079
16	1,528	1,565	1,857	2,438	3,158
Total	9,987	10,227	12,353	16,127	20,648
Inflow	6,658	6,818	8,235	10,751	13,765
TOTAL	16,645	17,045	20,588	26,878	34,413

Source: Tables 3 & 32

TABLE 40
COMPARISON GOODS MARKET SHARE (%)

Catchment Zone	Pentavia Retail Park 2010 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)
1	0.3	0.3	0.3	0.3	0.3
2	0.0	0.0	0.0	0.0	0.0
3	0.3	0.3	0.3	0.3	0.3
4	0.4	0.4	0.4	0.4	0.4
5	0.5	0.5	0.5	0.5	0.5
6	0.0	0.0	0.0	0.0	0.0
7	0.0	0.0	0.0	0.0	0.0
8	1.4	1.4	1.4	1.4	1.4
9	0.0	0.0	0.0	0.0	0.0
10	0.0	0.0	0.0	0.0	0.0
11	0.0	0.0	0.0	0.0	0.0
12	0.0	0.0	0.0	0.0	0.0
13	0.0	0.0	0.0	0.0	0.0
14	0.0	0.0	0.0	0.0	0.0
15	0.0	0.0	0.0	0.0	0.0
16	0.2	0.2	0.2	0.2	0.2

TABLE 41
COMPARISON GOODS SPEND (£)

Catchment Zone	Pentavia Retail Park 2010 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)
1	275	278	322	407	515
2	0	0	0	0	0
3	483	485	540	676	862
4	310	324	422	545	636
5	425	425	468	600	696
6	0	0	0	0	0
7	0	0	0	0	0
8	1,608	1,614	1,819	2,327	3,183
9	0	0	0	0	0
10	0	0	0	0	0
11	0	0	0	0	0
12	0	0	0	0	0
13	0	0	0	0	0
14	0	0	0	0	0
15	0	0	0	0	0
16	462	473	561	737	954
Total	3,562	3,599	4,132	5,291	6,846

Source: Tables 3 & 32

OUT OF CENTRE

TABLE 42
COMPARISON GOODS MARKET SHARE (%)

Catchment Zone	Silk Bridge Retail Park 2010 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)
1	0.0	0.0	0.0	0.0	0.0
2	0.0	0.0	0.0	0.0	0.0
3	0.0	0.0	0.0	0.0	0.0
4	0.6	0.6	0.6	0.6	0.6
5	0.4	0.4	0.4	0.4	0.4
6	0.0	0.0	0.0	0.0	0.0
7	0.3	0.3	0.3	0.3	0.3
8	0.5	0.5	0.5	0.5	0.5
9	3.6	3.6	3.6	3.6	3.6
10	0.2	0.2	0.2	0.2	0.2
11	2.5	2.5	2.5	2.5	2.5
12	0.6	0.6	0.6	0.6	0.6
13	0.0	0.0	0.0	0.0	0.0
14	1.6	1.6	1.6	1.6	1.6
15	0.9	0.9	0.9	0.9	0.9
16	0.4	0.4	0.4	0.4	0.4

TABLE 43
COMPARISON GOODS SPEND (£)

Catchment Zone	Silk Bridge Retail Park 2010 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)
1	0	0	0	0	0
2	0	0	0	0	0
3	0	0	0	0	0
4	440	459	599	773	903
5	293	293	323	413	479
6	0	0	0	0	0
7	225	225	246	306	352
8	559	562	633	810	1,107
9	5,170	5,400	6,769	8,619	11,657
10	239	239	259	347	421
11	3,195	3,373	5,014	6,517	8,371
12	590	600	696	912	1,189
13	0	0	0	0	0
14	1,761	1,785	2,037	2,613	3,327
15	2,046	2,100	2,514	3,303	4,256
16	959	982	1,166	1,531	1,982
Total	15,477	16,017	20,255	26,143	34,045

Source: Tables 3 & 32

TABLE 44
COMPARISON GOODS MARKET SHARE (%)

Catchment Zone	Broadway Retail Park, Cricklewood 2010 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)
1	0.0	0.0	0.0	0.0	0.0
2	0.1	0.1	0.1	0.1	0.1
3	0.1	0.1	0.1	0.1	0.1
4	0.2	0.2	0.2	0.2	0.2
5	0.2	0.2	0.2	0.2	0.2
6	0.3	0.3	0.3	0.3	0.3
7	0.3	0.3	0.3	0.3	0.3
8	0.0	0.0	0.0	0.0	0.0
9	0.1	0.1	0.1	0.1	0.1
10	0.9	0.9	0.9	0.9	0.9
11	1.9	1.9	1.9	1.9	1.9
12	0.1	0.1	0.1	0.1	0.1
13	0.0	0.0	0.0	0.0	0.0
14	0.4	0.4	0.4	0.4	0.4
15	1.6	1.6	1.6	1.6	1.6
16	0.4	0.4	0.4	0.4	0.4

TABLE 45
COMPARISON GOODS SPEND (£)

Catchment Zone	Broadway Retail Park, Cricklewood 2010 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)
1	0	0	0	0	0
2	87	88	99	126	163
3	126	126	140	176	224
4	129	134	175	226	264
5	158	158	174	223	259
6	334	335	367	460	556
7	189	189	207	258	296
8	0	0	0	0	0
9	114	119	149	190	256
10	1,024	1,021	1,110	1,486	1,804
11	2,417	2,552	3,793	4,930	6,332
12	68	69	80	105	137
13	0	0	0	0	0
14	403	408	466	598	761
15	3,555	3,648	4,367	5,739	7,394
16	1,137	1,165	1,382	1,815	2,350
Total	9,741	10,013	12,510	16,331	20,796

Source: Tables 3 & 32

TABLE 46
COMPARISON GOODS MARKET SHARE (%)

	Homebase North Finchley				
Catchment Zone	2010 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)
1	0.3	0.3	0.3	0.3	0.3
2	0.4	0.4	0.4	0.4	0.4
3	1.7	1.7	1.7	1.7	1.7
4	1.5	1.5	1.5	1.5	1.5
5	2.8	2.8	2.8	2.8	2.8
6	1.5	1.5	1.5	1.5	1.5
7	1.8	1.8	1.8	1.8	1.8
8	0.0	0.0	0.0	0.0	0.0
9	0.0	0.0	0.0	0.0	0.0
10	0.2	0.2	0.2	0.2	0.2
11	0.2	0.2	0.2	0.2	0.2
12	0.1	0.1	0.1	0.1	0.1
13	0.2	0.2	0.2	0.2	0.2
14	0.0	0.0	0.0	0.0	0.0
15	0.3	0.3	0.3	0.3	0.3
16	0.9	0.9	0.9	0.9	0.9

TABLE 47
COMPARISON GOODS SPEND (£)

	Homebase North Finchley				
Catchment Zone	2010 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)
1	275	278	322	406	515
2	423	427	480	612	788
3	2,897	2,907	3,236	4,055	5,168
4	1,115	1,165	1,520	1,960	2,291
5	2,312	2,313	2,549	3,264	3,787
6	1,793	1,795	1,968	2,469	2,979
7	1,211	1,209	1,326	1,650	1,893
8	0	0	0	0	0
9	0	0	0	0	0
10	232	232	252	337	409
11	239	253	376	488	627
12	68	69	80	105	137
13	147	148	170	218	278
14	0	0	0	0	0
15	742	761	911	1,197	1,543
16	2,559	2,621	3,110	4,083	5,288
Total	14,013	14,179	16,299	20,846	25,703

Source: Tables 3 & 32

OUT OF CENTRE

TABLE 48
COMPARISON GOODS MARKET SHARE (%)

Catchment Zone	B&Q Whetstone 2010 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)
1	3.4	3.4	3.4	3.4	3.4
2	3.3	3.3	3.3	3.3	3.3
3	1.8	1.8	1.8	1.8	1.8
4	1.3	1.3	1.3	1.3	1.3
5	0.9	0.9	0.9	0.9	0.9
6	0.6	0.6	0.6	0.6	0.6
7	0.3	0.3	0.3	0.3	0.3
8	0.1	0.1	0.1	0.1	0.1
9	0.0	0.0	0.0	0.0	0.0
10	0.0	0.0	0.0	0.0	0.0
11	0.0	0.0	0.0	0.0	0.0
12	0.1	0.1	0.1	0.1	0.1
13	0.9	0.9	0.9	0.9	0.9
14	0.0	0.0	0.0	0.0	0.0
15	0.1	0.1	0.1	0.1	0.1
16	0.3	0.3	0.3	0.3	0.3

TABLE 49
COMPARISON GOODS SPEND (£)

Catchment Zone	B&Q Whetstone 2008 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)
1	3,092	3,127	3,621	4,573	5,794
2	3,656	3,698	4,149	5,294	6,820
3	3,023	3,033	3,376	4,231	5,392
4	982	1,026	1,339	1,726	2,018
5	720	720	793	1,016	1,179
6	722	723	792	994	1,199
7	189	189	207	258	296
8	85	85	96	123	168
9	0	0	0	0	0
10	0	0	0	0	0
11	0	0	0	0	0
12	136	139	161	211	275
13	728	736	844	1,084	1,382
14	0	0	0	0	0
15	182	187	224	294	378
16	853	874	1,037	1,361	1,763
Total	14,369	14,536	16,638	21,164	26,664

Source: Tables 3 & 32

TABLE 50
COMPARISON GOODS MARKET SHARE (%)

Catchment Zone	Homebase Colindale 2008 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)
1	0.0	0.0	0.0	0.0	0.0
2	0.0	0.0	0.0	0.0	0.0
3	0.0	0.0	0.0	0.0	0.0
4	0.3	0.3	0.3	0.3	0.3
5	0.1	0.1	0.1	0.1	0.1
6	0.0	0.0	0.0	0.0	0.0
7	0.2	0.2	0.2	0.2	0.2
8	0.5	0.5	0.5	0.5	0.5
9	0.6	0.6	0.6	0.6	0.6
10	0.7	0.7	0.7	0.7	0.7
11	1.9	1.9	1.9	1.9	1.9
12	0.0	0.0	0.0	0.0	0.0
13	0.0	0.0	0.0	0.0	0.0
14	0.2	0.2	0.2	0.2	0.2
15	0.2	0.2	0.2	0.2	0.2
16	0.1	0.1	0.1	0.1	0.1

TABLE 51
COMPARISON GOODS SPEND (£)

Catchment Zone	Homebase Colindale 2010 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)
1	0	0	0	0	0
2	0	0	0	0	0
3	0	0	0	0	0
4	193	201	263	339	396
5	71	71	79	101	117
6	0	0	0	0	0
7	118	118	129	160	184
8	601	603	680	870	1,189
9	787	822	1,031	1,312	1,775
10	792	790	858	1,148	1,394
11	2,472	2,610	3,879	5,041	6,476
12	0	0	0	0	0
13	0	0	0	0	0
14	236	239	273	350	446
15	546	560	671	881	1,135
16	234	240	285	374	484
Total	6,049	6,254	8,145	10,577	13,596

Source: Tables 3 & 32

TABLE 52
BARNET CENTRES COMPARISON GOODS FLOORSPACE

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

Source: LB Barnet/Experian Goad

TABLE 53
BRENT CROSS SOUTH RETAIL PARK

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

Market Shares Added to Brent Cross Shopping Centre

TABLE 54

RETAIL WAREHOUSE FLOORSPACE

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

Source: Trevor Wood/LB Barnet/Experian Goad

LB BARNET
BOROUGH-WIDE TOWN CENTRES STUDY UPDATE 2010

TABLE 55
RETAIL COMPARISON COMMITMENTS

	Net Floorspace (sqm)	Status	Co Average Sales (£ per sq m net)	Average Turnover 2010 (£000s)	Average Turnover 2011 (£000s)	Average Turnover 2016 (£000s)	Average Turnover 2021 (£000s)	Average Turnover 2026 (£000s)
Former Courts Unit, Staples Corner Retail Park, Edgware Road	1,607	Completed	3,000	4,820	4,873	5,301	5,853	6,462
Extention to Tesco, Colney Hatch/North Circular Road	1,195	Completed	3,000	3,585	3,624	3,943	4,354	4,807
Unit 1C Brent Cross Shopping Centre	641	Completed	3,000	1,922	1,943	2,113	2,333	2,576
NEW COMMITMENTS								
Unit E1D Brent Cross Shopping Centre	-112	Completed	3,000	-335	-339	-369	-407	-449
Unit 4, Staples Corner Retail Park	1,801	Not Started	3,000	5,402	5,462	5,942	6,560	7,243
West Hendon Estate, West Hendon, London NW9	563	Not Started	3,000	1,688	1,706	1,856	2,049	2,263
Land at the former RAF East Camp Site Aerodrome Road/Grahame Park Way Hendon London NW9	300	Not Started	3,000	899	909	989	1,092	1,205
141 and 141A Hale Lane Edgware	99	Not Started	3,000	297	300	327	361	398
21 Colindale Avenue	116	Not Started	3,000	349	353	384	424	468
Endeavour House, 1 Lyonsdown Road, New Barnet	85	Completed	3,000	254	257	280	309	341
10 Golders Green Road	158	Not Started	3,000	475	480	523	577	637
214-218 Cricklewood Broadway	302	Not Started	3,000	905	914	995	1,098	1,213
Land at Station House and part of Colindale Hospital, Colindale Avenue	293	Not Started	3,000	878	887	965	1,066	1,177
TOTAL	**7,046**			**21,137**	**21,369**	**23,248**	**25,668**	**28,340**

Source: LB Barnet

LB BARNET
BOROUGH-WIDE TOWN CENTRES STUDY UPDATE 2010

TABLE 56
RETAIL PIPELINE - COMPARISON GOODS

	Net Floorspace (sqm)	Co Average Sales (£ per sqm net)	Total Turnover 2010 (£000s)	Total Turnover 2011 (£000s)	Total Turnover 2016 (£000s)	Total Turnover 2021 (£000s)	Total Turnover 2026 (£000s)
BXC application	28,590	6,000	171,540	173,427	188,678	208,316	210,407
Brent Cross, Tesco Extra plus unit shops (Replacement Flsp Only)	2,214	6,000	13,284	13,430	14,611	16,132	16,294
Colindale AAP	822	3,000	2,465	2,492	2,711	2,993	3,023
TOTAL	**31,626**		**187,289**	**189,349**	**206,000**	**227,441**	**229,724**

Source: LB Barnet

LB BARNET

BOROUGH-WIDE TOWN CENTRES STUDY UPDATE 2010

CAPACITY PROJECTIONS: COMPARISON GOODS

TABLE 57
FUTURE SHOP GLOBAL FLOORSPACE CAPACITY FOR LB BARNET

GROWTH IN SALES PER SQ M	1.1 %pa '10-'11 1.7 %pa '11-'16 2.0 %pa '16-'26				
	COMPARISON GOODS				
	2010	2011	2016	2021	2026
Total Comparison Goods Turnover in LB Barnet (£000)	883,547	900,166	1,071,809	1,379,093	1,747,627
Market Share from Survey Area	43.7	43.8	44.2	44.1	43.9
Survey Area Residents Spending	2,020,494	2,057,178	2,427,364	3,129,504	3,983,607
Inflow from beyond survey area (£000)	154,445	157,268	186,867	240,858	304,325
Total Town Centre Comparison Turnover (£000)	1,037,992	1,057,434	1,258,675	1,619,951	2,051,952
Existing Shop Floorspace (sqm net)	201,358	201,358	201,358	201,358	201,358
Sales per sqm net £	5,155	5,212	5,670	6,260	6,912
Sales from Existing Floorspace (£000)	1,037,992	1,049,410	1,141,694	1,260,523	1,391,719
Sales from Committed Floorspace (£000)	0	21,369	23,248	25,668	28,340
Residual Spending to Support new shops (£000)	0	-13,344	93,733	333,760	631,893
Sales per sqm net in new shops (£) Based on large store format	5,500	5,561	6,049	6,679	7,374
Capacity for new floorspace (sqm net)	0	-2,400	15,494	49,971	85,689

LB BARNET

BOROUGH-WIDE TOWN CENTRES STUDY UPDATE 2010

CAPACITY PROJECTIONS: COMPARISON GOODS

TABLE 60
FUTURE SHOP FLOORSPACE CAPACITY FOR EAST SUB AREA

GROWTH IN SALES PER SQ M			1.1 %pa '10-'11 1.7 %pa '11-'16 2.0 %pa '16-'26		
	COMPARISON GOODS				
	2010	2011	2016	2021	2026
Total Comparison Goods Turnover in LB Barnet (£000)	150,315	151,861	173,030	220,192	274,773
Market Share from Survey Area	7.4	7.4	7.1	7.0	6.9
Survey Area Residents Spending	2,020,494	2,057,178	2,427,364	3,129,504	3,983,607
Inflow to Friern Bridge Retail Park (25%) from beyond survey area (£000)	11,762	11,862	13,391	16,991	21,366
Total Town Centre Comparison Turnover (£000)	162,077	163,723	186,421	237,183	296,139
Existing Shop Floorspace (sqm net)	67,495	67,495	67,495	67,495	67,495
Sales per sqm net £	2,401	2,428	2,641	2,916	3,220
Sales from Existing Floorspace (£000)	162,077	163,860	178,270	196,824	217,310
Sales from Committed Floorspace (£000)	0	3,624	3,943	4,354	4,807
Residual Spending to Support new shops (£000)	0	-3,762	4,208	36,005	74,022
Sales per sqm net in new shops (£) Based on large store format	5,500	5,561	6,049	6,679	7,374
Capacity for new floorspace (sqm net)	0	-676	696	5,391	10,038

LB BARNET

BOROUGH-WIDE TOWN CENTRES STUDY UPDATE 2010

CAPACITY PROJECTIONS: COMPARISON GOODS

TABLE 61
FUTURE SHOP FLOORSPACE CAPACITY FOR SOUTH WEST

		1.1 %pa '10-'11			
GROWTH IN SALES PER SQ M		1.7 %pa '11-'16			
		2.0 %pa '16-'26			
	COMPARISON GOODS				
	2010	2011	2016	2021	2026
Total Comparison Goods Turnover in LB Barnet (£000)	589,294	601,087	721,695	931,540	1,177,875
Market Share from Survey Area	29.2	29.2	29.7	29.8	29.6
Survey Area Residents Spending	2,020,494	2,057,178	2,427,364	3,129,504	3,983,607
Inflow Brent Cross and Staples Corner Retail Park from beyond survey area (£000)	142,683	145,406	173,476	223,867	282,959
Total Town Centre Comparison Turnover (£000)	731,977	746,494	895,171	1,155,407	1,460,834
Existing Shop Floorspace (sqm net)	177,133	177,133	177,133	177,133	177,133
Sales per sqm net £	4,132	4,178	4,545	5,018	5,541
Sales from Existing Floorspace (£000)	731,977	740,029	805,107	888,903	981,421
Sales from Committed Floorspace (£000)	0	14,558	15,839	17,487	19,307
Residual Spending to Support new shops (£000)	0	-8,094	74,225	249,017	460,106
Sales per sqm net in new shops (£) Based on large store format	5,500	5,561	6,049	6,679	7,374
Capacity for new floorspace (sqm net)	0	-1,456	12,270	37,283	62,393

LB BARNET

BOROUGH-WIDE TOWN CENTRES STUDY UPDATE 2010

CAPACITY PROJECTIONS: COMPARISON GOODS

TABLE 62
FUTURE SHOP FLOORSPACE CAPACITY FOR SOUTH EAST

GROWTH IN SALES PER SQ M	1.1 %pa '10-'11 1.7 %pa '11-'16 2.0 %pa '16-'26				
	COMPARISON GOODS				
	2010	2011	2016	2021	2026
Total Comparison Goods Turnover in LB Barnet (£000)	10,515	10,591	11,958	15,556	18,974
Market Share from Survey Area	0.5	0.5	0.5	0.5	0.5
Survey Area Residents Spending	2,020,494	2,057,178	2,427,364	3,129,504	3,983,607
Inflow from beyond survey area (£000)	0	0	0	0	0
Total Town Centre Comparison Turnover (£000)	10,515	10,591	11,958	15,556	18,974
Existing Shop Floorspace (sqm net)	11,824	11,824	11,824	11,824	11,824
Sales per sqm net £	889	899	978	1,080	1,192
Sales from Existing Floorspace (£000)	10,515	10,631	11,566	12,769	14,098
Sales from Committed Floorspace (£000)	0	480	523	577	637
Residual Spending to Support new shops (£000)	0	-520	-130	2,210	4,239
Sales per sqm net in new shops (£) Based on large store format	5,500	5,561	6,049	6,679	7,374
Capacity for new floorspace (sqm net)	0	-93	-21	331	575

LB BARNET

BOROUGH-WIDE TOWN CENTRES STUDY UPDATE 2010

CAPACITY PROJECTIONS: COMPARISON GOODS

TABLE 58
FUTURE SHOP FLOORSPACE CAPACITY NORTH SUB AREA

GROWTH IN SALES PER SQ M	1.1 %pa '10-'11 1.7 %pa '11-'16 2.0 %pa '16-'26				
	COMPARISON GOODS				
	2010	2011	2016	2021	2026
Total Comparison Goods Turnover in LB Barnet (£000)	26,160	26,464	30,396	38,573	48,856
Market Share from Survey Area	1.3	1.3	1.3	1.2	1.2
Survey Area Residents Spending	2,020,494	2,057,178	2,427,364	3,129,504	3,983,607
Inflow from beyond survey area (£000)	0	0	0	0	0
Total Town Centre Comparison Turnover (£000)	26,160	26,464	30,396	38,573	48,856
Existing Shop Floorspace (sqm net)	11,443	11,443	11,443	11,443	11,443
Sales per sqm net £	2,286	2,311	2,515	2,776	3,065
Sales from Existing Floorspace (£000)	26,160	26,448	28,774	31,768	35,075
Sales from Committed Floorspace (£000)	0	257	280	309	341
Residual Spending to Support new shops (£000)	0	-241	1,343	6,496	13,440
Sales per sqm net in new shops (£) Based on large store format	5,500	5,561	6,049	6,679	7,374
Capacity for new floorspace (sqm net)	0	-43	222	973	1,823

LB BARNET

BOROUGH-WIDE TOWN CENTRES STUDY UPDATE 2010

CAPACITY PROJECTIONS: COMPARISON GOODS

TABLE 59
FUTURE SHOP FLOORSPACE CAPACITY WEST SUB AREA

GROWTH IN SALES PER SQ M	1.1 %pa '10-'11 1.7 %pa '11-'16 2.0 %pa '16-'26				
	COMPARISON GOODS				
	2010	2011	2016	2021	2026
Total Comparison Goods Turnover in LB Barnet (£000)	107,262	110,163	134,730	173,232	227,149
Market Share from Survey Area	5.3	5.4	5.6	5.5	5.7
Survey Area Residents Spending	2,020,494	2,057,178	2,427,364	3,129,504	3,983,607
Inflow from beyond survey area (£000)	0	0	0	0	0
Total Town Centre Comparison Turnover (£000)	107,262	110,163	134,730	173,232	227,149
Existing Shop Floorspace (sqm net)	68,467	68,467	68,467	68,467	68,467
Sales per sqm net £	1,567	1,584	1,723	1,902	2,101
Sales from Existing Floorspace (£000)	107,262	108,442	117,978	130,258	143,815
Sales from Committed Floorspace (£000)	0	2,449	2,664	2,941	3,248
Residual Spending to Support new shops (£000)	0	-728	14,087	40,032	80,086
Sales per sqm net in new shops (£) Based on large store format	5,500	5,561	6,049	6,679	7,374
Capacity for new floorspace (sqm net)	0	-131	2,329	5,994	10,860

LB BARNET

BOROUGH-WIDE TOWN CENTRES STUDY UPDATE 2010

CAPACITY PROJECTIONS: COMPARISON GOODS

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

GROWTH IN SALES PER SQ M	1.1 %pa '10-'11 1.7 %pa '11-'16 2.0 %pa '16-'26				
	COMPARISON GOODS				
	2010	2011	2016	2021	2026
Total Comparison Goods Turnover in LB Barnet (£000)	883,547	900,166	1,071,809	1,379,093	1,747,627
Market Share from Survey Area	43.7	43.8	44.2	44.1	43.9
Survey Area Residents Spending	2,020,494	2,057,178	2,427,364	3,129,504	3,983,607
Inflow from beyond survey area (£000)	154,445	157,268	186,867	240,858	304,325
Total Town Centre Comparison Turnover (£000)	1,037,992	1,057,434	1,258,675	1,619,951	2,051,952
Existing Shop Floorspace (sqm net)	201,358	201,358	201,358	201,358	201,358
Sales per sqm net £	5,155	5,212	5,670	6,260	6,912
Sales from Existing Floorspace (£000)	1,037,992	1,049,410	1,141,694	1,260,523	1,391,719
Sales from Committed Floorspace (£000)	0	21,369	40,570	253,109	258,064
Residual Spending to Support new shops (£000)	0	-13,344	76,411	106,319	402,169
Sales per sqm net in new shops (£) Based on large store format	5,500	5,561	6,049	6,679	7,374
Capacity for new floorspace (sqm net)	0	-2,400	12,631	15,918	54,537

LB BARNET

BOROUGH-WIDE TOWN CENTRES STUDY UPDATE 2010

CAPACITY PROJECTIONS: COMPARISON GOODS

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

GROWTH IN SALES PER SQ M	1.1 %pa '10-'11 1.7 %pa '11-'16 2.0 %pa '16-'26				
	COMPARISON GOODS				
	2010	2011	2016	2021	2026
Total Comparison Goods Turnover in LB Barnet (£000)	150,315	151,861	173,030	220,192	274,773
Market Share from Survey Area	7.4	7.4	7.1	7.0	6.9
Survey Area Residents Spending	2,020,494	2,057,178	2,427,364	3,129,504	3,983,607
Inflow to Friern Bridge Retail Park (25%) from beyond survey area (£000)	11,762	11,862	13,391	16,991	21,366
Total Town Centre Comparison Turnover (£000)	162,077	163,723	186,421	237,183	296,139
Existing Shop Floorspace (sqm net)	67,495	67,495	67,495	67,495	67,495
Sales per sqm net £	2,401	2,428	2,641	2,916	3,220
Sales from Existing Floorspace (£000)	162,077	163,860	178,270	196,824	217,310
Sales from Committed Floorspace (£000)	0	3,624	3,943	4,354	4,807
Residual Spending to Support new shops (£000)	0	-3,762	4,208	36,005	74,022
Sales per sqm net in new shops (£) Based on large store format	5,500	5,561	6,049	6,679	7,374
Capacity for new floorspace (sqm net)	0	-676	696	5,391	10,038

LB BARNET

BOROUGH-WIDE TOWN CENTRES STUDY UPDATE 2010

CAPACITY PROJECTIONS: COMPARISON GOODS

TABLE 67
FUTURE SHOP FLOORSPACE CAPACITY FOR SOUTH WEST - PIPELINE

GROWTH IN SALES PER SQ M			1.1 %pa '10-'11 1.7 %pa '11-'16 2.0 %pa '16-'26		
	COMPARISON GOODS				
	2010	2011	2016	2021	2026
Total Comparison Goods Turnover in LB Barnet (£000)	589,294	601,087	721,695	931,540	1,177,875
Market Share from Survey Area	29.2	29.2	29.7	29.8	29.6
Survey Area Residents Spending	2,020,494	2,057,178	2,427,364	3,129,504	3,983,607
Inflow Brent Cross and Staples Corner Retail Park from beyond survey area (£000)	142,683	145,406	173,476	223,867	282,959
Total Town Centre Comparison Turnover (£000)	731,977	746,494	895,171	1,155,407	1,460,834
Existing Shop Floorspace (sqm net)	177,133	177,133	177,133	177,133	177,133
Sales per sqm net £	4,132	4,178	4,545	5,018	5,541
Sales from Existing Floorspace (£000)	731,977	740,029	805,107	888,903	981,421
Sales from Committed Floorspace (£000)	0	14,558	30,450	241,935	246,008
Residual Spending to Support new shops (£000)	0	-8,094	59,614	24,569	233,405
Sales per sqm net in new shops (£) Based on large store format	5,500	5,561	6,049	6,679	7,374
Capacity for new floorspace (sqm net)	0	-1,456	9,854	3,678	31,651

LB BARNET

BOROUGH-WIDE TOWN CENTRES STUDY UPDATE 2010

CAPACITY PROJECTIONS: COMPARISON GOODS

TABLE 68
FUTURE SHOP FLOORSPACE CAPACITY FOR SOUTH EAST - PIPELINE

GROWTH IN SALES PER SQ M		1.1 %pa '10-'11 1.7 %pa '11-'16 2.0 %pa '16-'26			
	COMPARISON GOODS				
	2010	2011	2016	2021	2026
Total Comparison Goods Turnover in LB Barnet (£000)	10,515	10,591	11,958	15,556	18,974
Market Share from Survey Area	0.5	0.5	0.5	0.5	0.5
Survey Area Residents Spending	2,020,494	2,057,178	2,427,364	3,129,504	3,983,607
Inflow from beyond survey area (£000)	0	0	0	0	0
Total Town Centre Comparison Turnover (£000)	10,515	10,591	11,958	15,556	18,974
Existing Shop Floorspace (sqm net)	11,824	11,824	11,824	11,824	11,824
Sales per sqm net £	889	899	978	1,080	1,192
Sales from Existing Floorspace (£000)	10,515	10,631	11,566	12,769	14,098
Sales from Committed Floorspace (£000)	0	480	523	577	637
Residual Spending to Support new shops (£000)	0	-520	-130	2,210	4,239
Sales per sqm net in new shops (£) Based on large store format	5,500	5,561	6,049	6,679	7,374
Capacity for new floorspace (sqm net)	0	-93	-21	331	575

LB BARNET

BOROUGH-WIDE TOWN CENTRES STUDY UPDATE 2010

CAPACITY PROJECTIONS: COMPARISON GOODS

TABLE 64
FUTURE SHOP FLOORSPACE CAPACITY NORTH SUB AREA - PIPELINE

GROWTH IN SALES PER SQ M	1.1 %pa '10-'11 1.7 %pa '11-'16 2.0 %pa '16-'26				
	COMPARISON GOODS				
	2010	2011	2016	2021	2026
Total Comparison Goods Turnover in LB Barnet (£000)	26,160	26,464	30,396	38,573	48,856
Market Share from Survey Area	1.3	1.3	1.3	1.2	1.2
Survey Area Residents Spending	2,020,494	2,057,178	2,427,364	3,129,504	3,983,607
Inflow from beyond survey area (£000)	0	0	0	0	0
Total Town Centre Comparison Turnover (£000)	26,160	26,464	30,396	38,573	48,856
Existing Shop Floorspace (sqm net)	11,443	11,443	11,443	11,443	11,443
Sales per sqm net £	2,286	2,311	2,515	2,776	3,065
Sales from Existing Floorspace (£000)	26,160	26,448	28,774	31,768	35,075
Sales from Committed Floorspace (£000)	0	257	280	309	341
Residual Spending to Support new shops (£000)	0	-241	1,343	6,496	13,440
Sales per sqm net in new shops (£) Based on large store format	5,500	5,561	6,049	6,679	7,374
Capacity for new floorspace (sqm net)	0	-43	222	973	1,823

LB BARNET

BOROUGH-WIDE TOWN CENTRES STUDY UPDATE 2010

CAPACITY PROJECTIONS: COMPARISON GOODS

TABLE 65
FUTURE SHOP FLOORSPACE CAPACITY WEST SUB AREA - PIPELINE

GROWTH IN SALES PER SQ M	1.1 %pa '10-'11 1.7 %pa '11-'16 2.0 %pa '16-'26				
	COMPARISON GOODS				
	2010	2011	2016	2021	2026
Total Comparison Goods Turnover in LB Barnet (£000)	107,262	110,163	134,730	173,232	227,149
Market Share from Survey Area	5.3	5.4	5.6	5.5	5.7
Survey Area Residents Spending	2,020,494	2,057,178	2,427,364	3,129,504	3,983,607
Inflow from beyond survey area (£000)	0	0	0	0	0
Total Town Centre Comparison Turnover (£000)	107,262	110,163	134,730	173,232	227,149
Existing Shop Floorspace (sqm net)	68,467	68,467	68,467	68,467	68,467
Sales per sqm net £	1,567	1,584	1,723	1,902	2,101
Sales from Existing Floorspace (£000)	107,262	108,442	117,978	130,258	143,815
Sales from Committed Floorspace (£000)	0	2,449	5,375	5,934	6,270
Residual Spending to Support new shops (£000)	0	-728	11,376	37,040	77,063
Sales per sqm net in new shops (£) Based on large store format	5,500	5,561	6,049	6,679	7,374
Capacity for new floorspace (sqm net)	0	-131	1,881	5,546	10,450