

# Local Plan Key Facts Evidence Paper June 2021



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## 1. Introduction

The Local Plan, once adopted, will set out the planning policies for London Borough of Barnet up to 2036. The National Planning Policy Framework states that Local Plans should be “*underpinned by relevant and up-to-date evidence. This should be adequate and proportionate, focused tightly on supporting and justifying the policies concerned, and take into account relevant market signals*” (paragraph 31). In order to be found sound, a Local Plan will need to be justified and supported by a proportionate evidence base.

The purpose of this Paper is to provide an overview of the key facts and figures about Barnet and how these have helped shape Local Plan policies. It contains facts and figures related to Barnet’s socio-economic and environmental context.

Barnet has been significantly impacted by the COVID19 pandemic. While primarily a health issue, it is likely to have an impact across economic, environmental and social dimensions. Although evidence on the long term impact of COVID19 is still emerging, the information contained within this paper is based on the most up to date data available at the time.

This Paper does not represent the complete evidence base. The full evidence base comprises a wide range of documents which have been produced in support of the draft Barnet Local Plan and this Paper should be read in conjunction with those documents.

## 2. London Borough of Barnet in Context

Barnet is an outer London Borough adjacent to the London Boroughs of Enfield, Haringey, Camden, Brent and Harrow. To the north, it borders Hertsmere District in Hertfordshire.

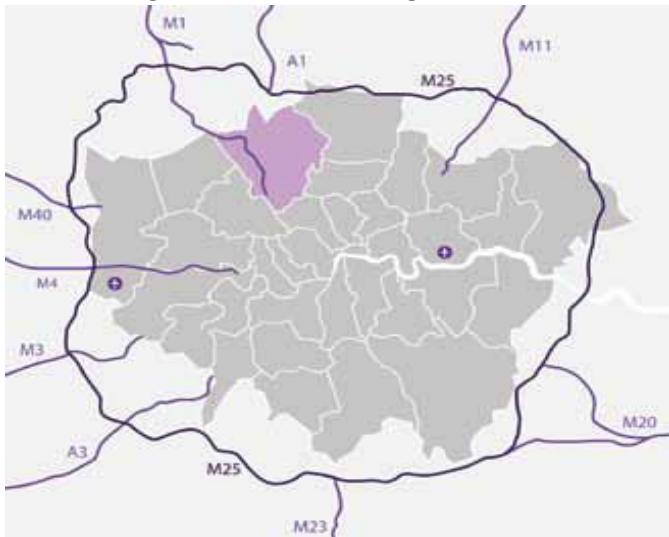
Barnet lies in the Thames Basin, its landform is characterised by gentle undulations shelving to the south, with the western part of the Borough generally lower lying. Much of the Borough lies on London Clay with more fertile alluvial soils along the river valleys of the Silkstream, Dollis and Pymmes Brooks.

There are three rivers in Barnet that remain at the surface and form distinctive habitats and valuable green corridors. The most significant open water habitat is the Welsh Harp Reservoir, a Site of Special Scientific Interest (SSSI) that supports a significant variety of wildfowl.

Barnet is one of the greenest boroughs in London, 28% of the Borough is designated as Green Belt. Overall, there are 1,192 hectares of public open space across the Borough.

Barnet is well connected through a comprehensive road and rail network; the M1 provides access to the North and the M25, and the A1000 links the Borough with Central London. Additionally, the North Circular Road (A406) provides major connections east and west. Barnet has good access to both the Northern Line and overground rail services.

Figure 1: London Borough of Barnet



### 3. Barnet's Population

Barnet's population has increased by 12% since 2011. The estimated population is 402,700 which makes Barnet the most populous London Borough.

The Borough's overall population is projected to increase to 452,000 by 2036, which is an increase of 13%.

The highest rates of population growth are forecast to occur around the planned development areas in the west of the Borough, particularly in Golders Green, Colindale, Mill Hill, West Hendon and Edgware.

Between 2020 – 2030, the Joint Strategic Needs Assessment predicts that there will be a 30% increase in the number of older people (65+). This is

compared to a 5% increase in the number of young people (0-19) and a 9% increase for working age people (16 – 64)<sup>1</sup>.

Barnet has a higher proportion of people aged 85 and over (3.1%) compared to Outer London (1.8%) and the UK (2.3%). Hampstead Garden Suburb, Edgware, Finchley Church End and Mill Hill have the largest proportion of people who are over 65. Within Colindale and Golders Green wards, higher levels of growth in the proportion of the population aged 65+ are expected.

Barnet's population is projected to become more diverse, with the proportion of Black, Asian and Minority Ethnic (BAME) people in the Borough rising from 40% in 2020 to 43% in 2030. The White ethnic group is projected to decrease over the same period.

Figure 2: Percentage change in ethnic groups in Barnet (2020 – 2030)

Ethnic Group	% change between 2020–2030
Other Ethnic Group	24.60%
Other Asian	24.00%
Other Mixed	20.00%
Chinese	19.80%
Arab	19.20%
White & Black African	17.50%
Other White	17.20%
Pakistani	15.20%
Other Black	14.90%
Black African	14.50%

<sup>1</sup> These figures are based on the GLA Borough Preferred Option for 2018

White & Asian	12.20%
Indian	11.30%
White & Black Caribbean	11.10%
Black Caribbean	10.00%
Bangladeshi	7.70%
White Irish	2.20%
White British	0.60%
White Ethnic Group	5.80%
Black, Asian and Minority Ethnic (BAME)	17.30%

- **Employment:** Approximately 75.6% of the working age population were in employment, which is slightly higher than the London (75.3%) and national average (75.4%)<sup>4</sup>.
- **Unemployment:** The percentage of economically active people over the age of 16 and over who are unemployed (unemployment rate) was 5.3%. This is slightly lower than the London average (5.9%) but higher than the national average (4.6%)<sup>5</sup>.
- **Economic inactivity:** The percentage of working age people who are not in work and are not classed as unemployed (economic inactivity) was 20.5%. Of these, 75.9% were not available for work or were not seeking work. The economic inactivity rate is slightly higher than the London (41.9%) but lower than the national average (20.9%)<sup>6</sup>.

#### 4. Labour Market

A snapshot of Barnet's Labour Market reveals that the Borough's economic activity rate and employment rate is lower than the London and the UK average.

- **Economic activity:** Between Jul January 2020 - December 2020, there were almost 218,900<sup>2</sup> people living in Barnet who were economically active<sup>3</sup>. This includes residents employed and unemployed, people in full time education and those seeking employment. This represents 79% of the working age population.

Figure 3: Overview of Barnet's Labour Market

	LB Barnet		London (%)	National (%)
	No.	%		
Economically Active (16 – 64)	218,900	79.5	80.1	79.1
In Employment (16 – 64)	208,900	75.6	75.3	75.4

<sup>2</sup> Nomis (2018)

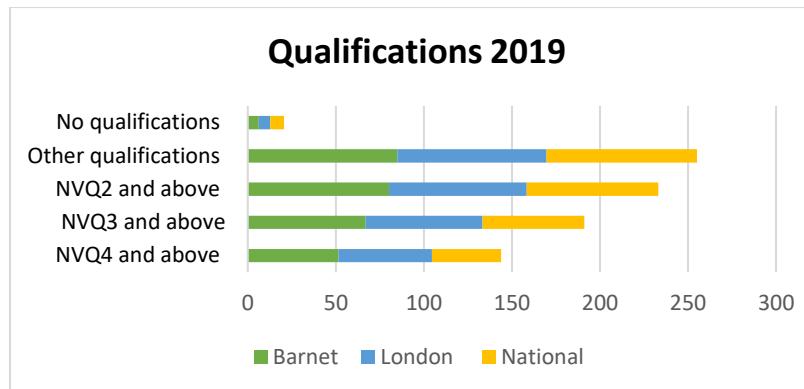
<sup>3</sup> People aged 16 and over who are either in employment or unemployed (NOMIS)

<sup>4</sup> Nomis (2018)

<sup>5</sup> Nomis (2018)

<sup>6</sup> Nomis (2018)

Economic inactivity				
Unemployment Rate (16 – 64)	11,700	5.3	5.9	4.6
Male unemployment rate	-	-	6.2	4.9
Female unemployment rate	8,400	8.1	5.6	4.2



Source: Nomis

## 5. Qualifications

In terms of qualifications and educational attainment, 61.9% of Barnet's residents in 2020 have a 'high' level qualification (defined as NVQ Level 4 or above), compared to 58.5% for London and 43.1% for the rest of the UK.

In 2018, 6.2 % of Barnet residents held no qualification, which is lower than both the London (6.6%) and national (7.8%) average.

Approximately 67% held 'mid' level qualification (defined as qualifications at NVQ level 3 or trade apprenticeships) which is lower than London (66%) but higher than the national average (57%).

Figure 4: Qualifications (Jan 2018 – Dec 2018)

## 6. Occupations

Analysis of employment by occupation data shows that 13.5% of Barnet's workers are in Manager, Director and Senior Official occupations. This is higher than both the London and national average. When this category is combined with professional occupants, 66.5% of Barnet's workforce falls into this combined work group (compared to 63.1% for London and 50.2% nationally). The higher level of senior occupants is linked with the Borough's high educational attainment level (see figure 4 ).

Figure 5: Occupations

Occupations	Barnet (%)	London (%)	National (%)
Group 1 – 3			
Managers, Directors and senior officials	13.5	13.4	11.5

Professional Occupations	32.5	29.9	22.8
Associate Professional & Technical	19.3	19.4	15.8
Group 4 - 5			
Admin & and Secretarial	9.1	9.2	10.0
Skilled Trades Occupation	7.1	6.0	9.2
Group 6-7			
Caring, Leisure and Other Services	7.3	6.5	8.8
Sales & Customer Services	-	5.2	6.9
Group 8 – 9			
Process plant & Machine operatives	-	3.3	5.5
Elementary Occupations	3.9	6.5	9.2

Source: Nomis

## 7. Housing

Barnet's population is expected to significantly increase over the plan period. To accommodate this level of growth, the Council will need to

deliver a minimum of 35,460 new homes over the same period (equating to 2,364 new homes a year).

Approximately 43% of the existing housing stock of 151,000 dwellings is made up of flats or maisonettes. It is expected that this figure will exceed 50% before 2030.

Since 2014, the average house price in Barnet has increased from £391,000 to £545,000<sup>7</sup> and is now 15 times the Borough median household income of £36,000<sup>8</sup> and placing Barnet within the 10 most expensive Boroughs in London.

Private sector rents have also increased with average rents around £1400, which is higher than the average outer London rent of £1300 and the third highest in London. Private sector rents have increased by 24% since 2011<sup>9</sup>.

Issues of affordability have resulted in a shift in housing tenure within the Borough. Figure 6 shows that private rented sector accommodation has increased from 17% of households in 2001 to 26% in 2016.

### Housing Delivery and Need

Since 2011, over 10,000 new homes have been built in Barnet, of which 2,657 are affordable homes for rent or sale. The majority of these new homes are 2 bed properties (49%).

In general, one and two bedroom dwellings are the most dominant type of accommodation delivered in Barnet, accounting for 78% of all new homes overall and 86% of flats (as indicated in Figure 7).

<sup>7</sup> Barnet Housing Strategy 2019 – 2024

<sup>8</sup> Barnet Housing Strategy 2019 – 2024

<sup>9</sup> Barnet Housing Strategy 2019 – 2024

Figure 6: Housing tenure 2011 – 2016

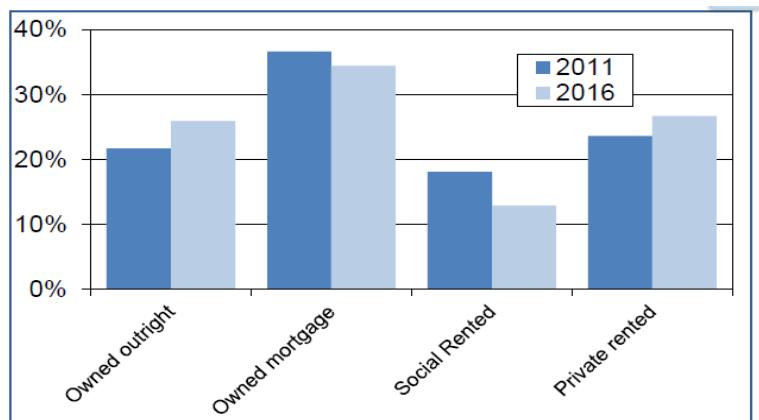
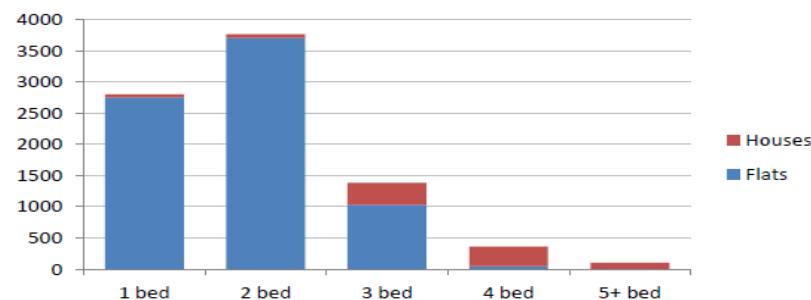


Figure 7: Proportion of new flats and houses by bedroom 2011/12-2016/17



The Strategic Housing Market Assessment (SHMA) identified the full Objectively Assessed Need (OAN) for housing in Barnet as 3,060 dwellings per year. According to the SHMA the priority size for affordable homes

are 2 bedroom dwellings while for market housing the priority size is 3 bedroom.

## 8. Barnet's Economy

Barnet lacks a single strong centre, consequently firms are distributed among a series of town centres along the A1000, the A406 North Circular and the A1/M1 corridor. The A1000 centres are mainly; although not exclusively, office-based in character, whilst the North Circular is largely occupied by distribution firms. The more significant centres, in job density terms include: Edgware, East Finchley, Finchley Church End, Brent Street Hendon and North Finchley, with secondary centres in Chipping Barnet and New Barnet (see Figure 8).

There are around 23,000 businesses in Barnet, employing 132,000 people. Key employment sectors include:

- Professional and financial
- Care and Health
- Education
- Retail
- Hospitality, Leisure and Recreation
- Business Support Services
- Construction

Figure 8: Distribution of Barnet's businesses

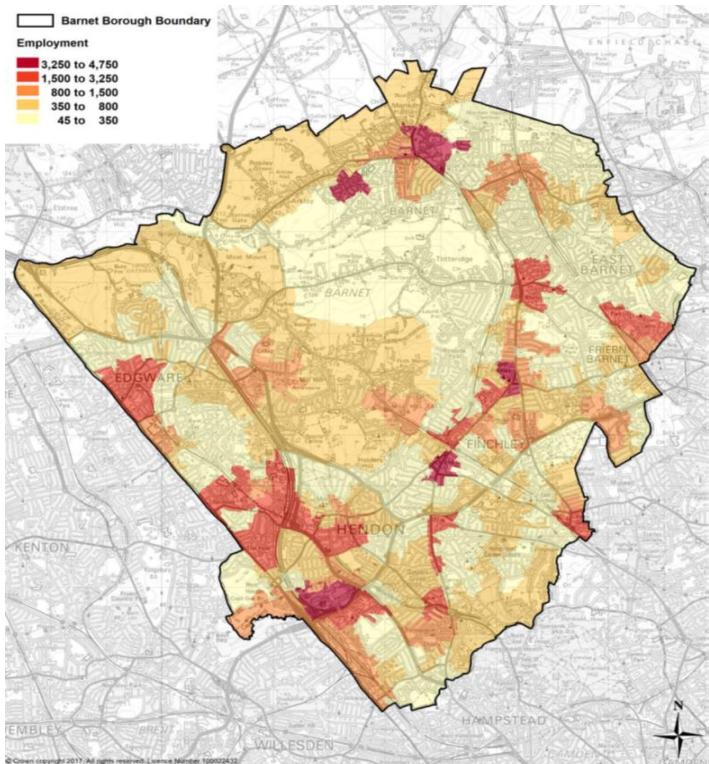
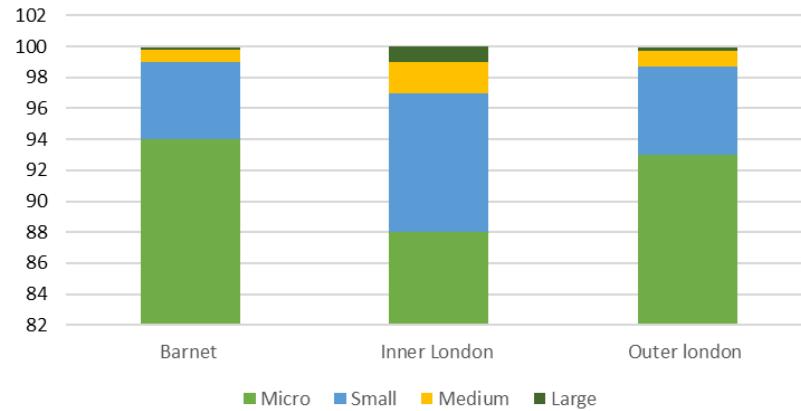


Figure 9 shows that a large proportion of businesses operating in Barnet are classified as 'micro' businesses, employing fewer than 9 people and make up approximately 94% of the Boroughs business base<sup>10</sup>.

Figure 9: Barnet's Business Profile 2019

<sup>10</sup> Nomis 2019

Barnet's business profile 2019 (%)



Since 2011, there has been a steady increase in businesses operating in Barnet (see Figure 10), along with a 15% increase in employment overall. In addition, the Borough also has a higher proportion of people who are self-employed (15.2%) compared to London as a whole (13.1%) and nationally (10.7%), suggesting high levels of entrepreneurship.

Barnet has a high business birth rate which is broadly in line with the London average and neighbouring Boroughs. However, the Borough also has a high business death rate and lower business survival rates than other areas.

Figure 10: No. of businesses operating in Barnet

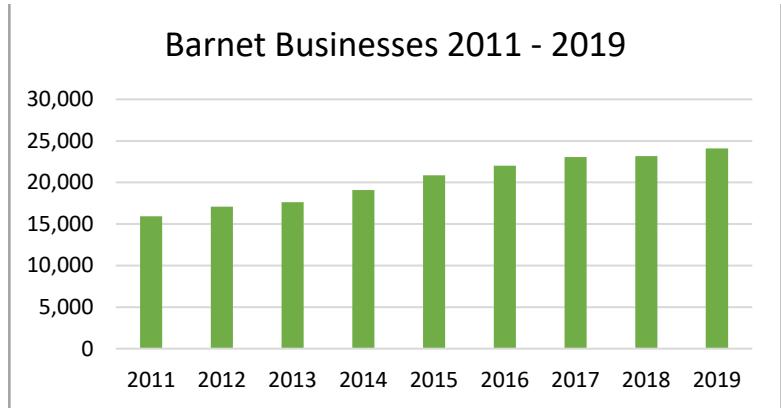
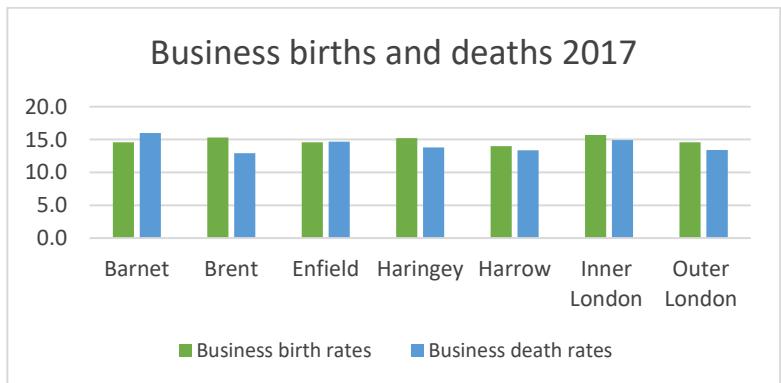


Figure 11: Business birth rates versus business deaths



## 9. Barnet's Town Centres

Barnet's town centre hierarchy (as set out in the London Plan) consists of one Major Centre (Edgware), 13 district centres, and 15 local and neighborhood centres, as well as a regional shopping centre at Brent Cross. Barnet has its own 'non planning' designation 'Main Town Centres'. These are Burnt Oak, Chipping Barnet, Finchley Central (Church End), Golders Green and North Finchley. 'main' town centres form the Council's priorities for investment and revitalisation, supporting local businesses and delivering mixed use development in accordance with the place making policies of the Local Plan.

Figure 12: Town Centre employment and performance



The majority of Barnet's town centres have experienced employment growth in recent years, with the exception of Edgware (-2%) and Cricklewood (-5%).

Some of Barnet's town centres have a specialist niche. Church End also known as Finchley Central specialises in the Financial & Professional as well as ICT & Digital sectors while in Cricklewood the retail sector is strong. Retail is considered weaker in the surrounding areas of Burnt Oak and Golders Green.

#### Overview of Barnet's Main Town Centres

This section provides an overview of the performance for each of Barnet's main town centres, ranked against London, Outer London and the Borough as a whole.

#### Edgware Town Centre

- Edgware is Barnet's largest town centre and is the only one designated as a Major Town Centre
- Edgware has experienced a reduction in employment between the period 2011 – 2016. It has also lost almost 7,000 sqm of office floorspace to permitted development rights.
- Edgware's vacancy levels are in line with London and Outer London average.

Table 1: Overview of Edgware Town Centre

Rank	Jobs change 2011- 2016	Retail floorspace change 2011-2016	Retail vacancy 2017	Convenience floorspace change (%)
1	London 13%	London 4%	Edgware 6%	Barnet (33%)
2	Outer London 10%	Edgware 2%	London 6%	Edgware 30%
3	Barnet 9%	Outer London 1%	Outer London 6%	Outer London 29%
4	Edgware - 2%	Barnet -3%	Barnet 12%	London 25%

Source: GLA Town Centre Health Checks (2017)

### Burnt Oak Town Centre

- Burnt Oak Town Centre includes land in LB Brent and LB Harrow.
- Burnt Oak experienced a significant increase in employment (+26% from 2011 – 2016) which is higher than its comparators.
- Within Burnt Oak, there has been a larger proportion of growth in retail floorspace than comparators.
- Burnt Oak has a slightly higher vacancy rate compared to London but below that of the Borough as a whole.

Table 2: Overview of Burnt Oak Town Centre

Rank	Jobs change 2011- 2016	Retail floorspace change 2011-2016	Retail vacancy 2017	Convenience floorspace change (%)
<b>1</b>	Burnt Oak 26%	Burnt Oak 6%	London 6%	Burnt Oak 25%
<b>2</b>	London 13%	London 4%	Outer London 6%	Barnet 33%
<b>3</b>	Outer London 10%	Outer London 1%	Burnt Oak 7%	Outer London 29%
<b>4</b>	Barnet 9%	Barnet -3%	Barnet 12%	London 25%

Source: GLA Town Centre Health Checks (2017)

### Chipping Barnet Town Centre

- With two Conservation Areas Chipping Barnet is a historic town centre.

- It has higher vacancy levels than comparator areas which has been increasing over the last five years.
- Chipping Barnet has experienced a significant loss of retail floorspace since 2012 although it still has a substantial amount of retail floorspace in comparison with other District town centres.
- It has a lower proportion of convenience floorspace when compared to Barnet

Table 3: Overview of Chipping Barnet Town Centre

Rank	Jobs change 2011- 2016	Retail floorspace change 2011-2016	Retail vacancy 2017	Convenience floorspace change (%)
<b>1</b>	London 13%	London 4%	London 6%	Barnet 33%
<b>2</b>	Chipping Barnet 12%	Outer London 1%	Outer London 6%	Outer London 29%
<b>3</b>	Outer London 10%	Barnet -3%	Barnet 12%	London 25%
<b>4</b>	Barnet 9%	Chipping Barnet -3%	Chipping Barnet 15%	Chipping Barnet 24%

Source: GLA Town Centre Health Checks (2017)

### Cricklewood Town Centre

- Cricklewood Town Centre extends into LB Brent as well as LB Camden.

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- There has been a reduction of employment in Cricklewood in recent years, whilst the rest of outer London and District centres have grown.
- Within Cricklewood, there has been strong growth in retail floorspace – significantly higher than the levels of growth seen across London and Outer London.
- It has a high vacancy rate than London and Outer London.
- It has experienced a larger decline in retail floorspace than the Barnet average and has the 2<sup>nd</sup> lowest amount of retail floorspace of Barnet's District town centres.
- It has a high vacancy rates – these are in line with Borough average.
- There is a significant proportion of convenience floorspace in Finchley Church End.

Table 4: overview of Cricklewood town centre

Rank	Jobs change 2011- 2016	Retail floorspace change 2011-2016	Retail vacancy 2017	Convenience floorspace change (%)
1	London 13%	Cricklewood 10%	London 6%	Barnet 33%
2	Outer London 10%	London 4%	Outer London 6%	Cricklewood 30%
3	Barnet 9%	Outer London 1%	Cricklewood 9%	Outer London 29%
4	Cricklewood -5%	Barnet -3%	Barnet 12%	London 25%

Source: GLA Town Centre Health Checks (2017)

### Finchley Church End Town Centre

- The Council has renamed Finchley Church End as Finchley Central Town Centre.

Table 5: Overview of Finchley Church End Town Centre

Rank	Jobs change 2011- 2016	Retail floorspace change 2011-2016	Retail vacancy 2017	Convenience floorspace change (%)
1	London 13%	London 4%	London 6%	Church End 47%
2	Outer London 10%	Outer London 1%	Outer London 6%	Barnet 33%
3	Barnet 9%	Barnet -3%	Barnet 12%	Outer London 23%
4	Church End 5%	Church End - 5%	Church End 13%	London 25%

Source: GLA Town Centre Health Checks (2017)

### North Finchley Town Centre

- North Finchley is one of Barnet's largest District town centres.

- It has experienced the highest level of employment growth across all District town centres and comparator areas.
- It has experienced the largest decline in retail floorspace in recent years but still a high amount of retail floorspace compared to other District town centres.
- North Finchley has higher vacancy rates than comparator areas.

Table 6: Overview of North Finchley Town Centre

Rank	Jobs change 2011- 2016	Retail floorspace change 2011-2016	Retail vacancy 2017	Convenience floorspace change (%)
1	North Finchley 29%	London 4%	London 6%	Barnet 33%
2	London 13%	Outer London 1%	Outer London 6%	Outer London 29%
3	Outer London 10%	Barnet -3%	Barnet 12%	North Finchley 29%
4	Barnet 9%	North Finchley -9%	North Finchley 13%	London 25%

Source: GLA Town Centre Health Checks (2017)

Barnet is well connected by major roads and is of critical strategic importance and a key freight route. In 2018, Barnet residents owned 142,000 private cars which is the 2<sup>nd</sup> highest level of car ownership in London.

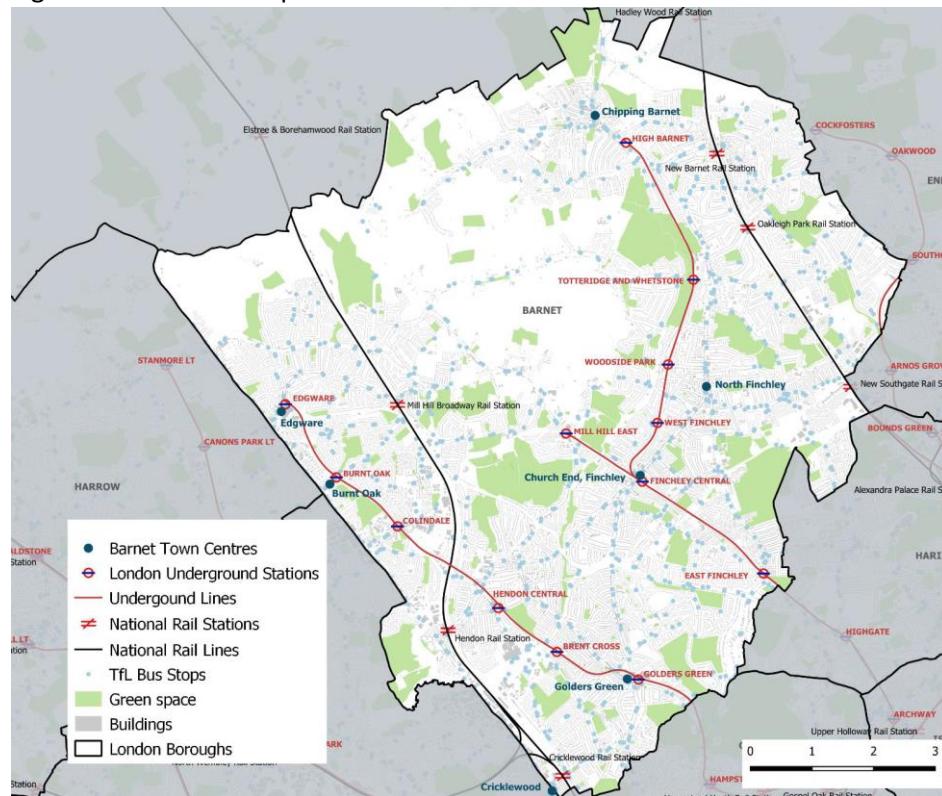
Transport for London (TfL) have identified a number of congestion hotspots within the Borough that are expected to worsen with population and employment growth. These hotspots include the A406 with pinch points at Henlys Corner and the A5, with pinch points between Brent Cross and Cricklewood.

The Borough is well served by public transport including underground, national rail and bus routes, however, east-west connections across the Borough are challenging.

All of the seven 'Main' town centres (Burnt Oak, Chipping Barnet, Finchley Central, Golders Green and North Finchley) have a 4+ PTAL rating. Low PTAL is more of a problem in the north of the Borough.

## 10. Transport

Figure 13: Public Transport – Barnet



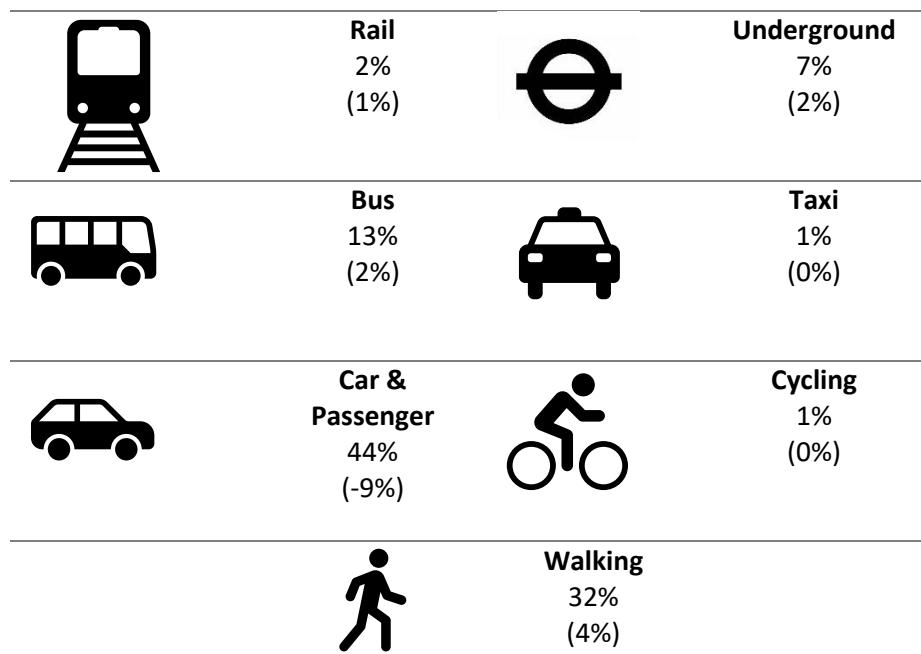
### Transport modes

The car remains the principal mode of travel, accounting for approximately 44% of all trips made in Barnet. However, car travel had the largest modal shift between 2011 – 2016 with a 9% decrease.

Approximately 55% of all journeys during the same period were made by bicycle, foot and public transport.

There have also been small increases in the proportion of people using more sustainable modes of transport with a 4% increase in walking and 2% increase in the bus travel.

Figure 14: Modal Share of Transport 2016 (% change since 2011)



## 11. Environment

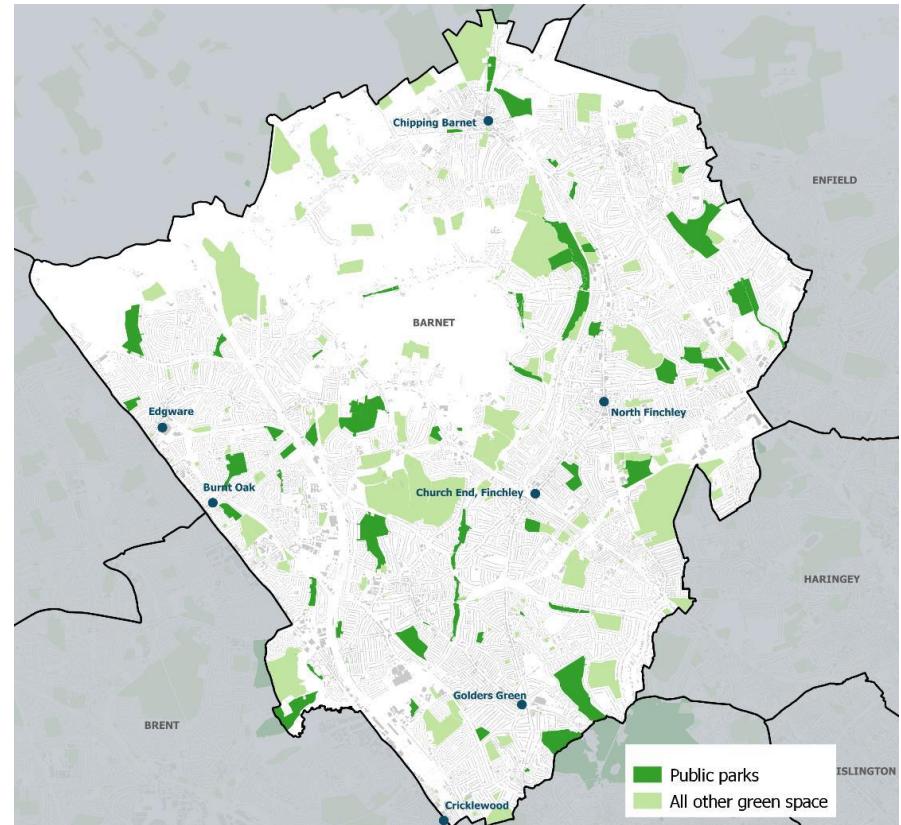
### Greenspace provision

In 2015, the total area of parks in Barnet amounted to 465.2 hectares (approximately 5.4% of the total area of the Borough).

The total greenspace provision in Barnet is 888 hectares, which includes parks, playgrounds, sports sites, natural and semi-natural greenspaces and other miscellaneous sites. This equates to nearly 10% of the area of the Borough and 2.41 hectares per head of population.

On a ward level, the provision of parks in the following wards falls below the current Borough average in terms of parks provision per 1,000 head of population:

- Brunswick Park, Burnt Oak, Childs Hill, Colindale, East Finchley Oakleigh, West Finchley, West Hendon and Woodhouse.
- High Barnet, Totteridge, East Barnet, Coppetts, Garden Suburb and Mill Hill all have levels of provision above the Borough average.



Source: Barnet Regeneration Strategy Evidence Base 2016

Figure 15: Provision of green space

#### Quality Assessment of parks and open spaces

- For a more detailed assessment of parks and open spaces in the Borough, please see the Councils [Parks and Open Space Strategy](#).

Table 7: Quality and Value of parks 2009 -2015

	2009		2015	
	No	% of total	No.	% of total
No. of excellent Parks	5	7	1	1
No of good parks	15	21	9	13
No. of fair parks	38	52	49	69
No. of poor parks	15	21	12	17
Total no. of parks	73	100	73	100

Source: Open Space Strategy 2016 – 2026

## 12. Health

The health of people in Barnet is generally better than the national average. Life expectancy for both men (82.4 years) and women (85.8) is higher than the London and England average.

There is considerable variation in life expectancy across the Borough. For example, on a ward level, Burnt Oak has the lowest average life expectancy from birth of 78.8 years for males (4.2 years behind the Barnet average) and 81.4 for females. This is lower than the average age for Garden Suburb which has the highest life expectancy of 87.1 from birth for males and 89.5 for females.

### Mental Health

Across all ages, the prevalence of mental health problems (including schizophrenic, bipolar affective disorder and other psychoses) in Barnet was 1.04%, which is higher than the national average (0.96%) but lower than the London average (1.12%). Barnet has a lower prevalence of depression (7.3%) in adults than the national average (7.6%).

The prevalence of mental health problems varies by age and gender, with males more likely (11.4%) to have experienced or be experiencing a mental health problem than girls (7.8%). Children aged 11 to 16 years olds are also more likely (11.5%) than 5 to 10 year olds (7.7%) to experience mental health problems.

### Dementia

By 2035 there are expected to be more people living with dementia in Barnet. Levels are expected to rise to 7,407 by 2035 which is an increase of 74%. This presents a significant health and social care challenge to the Borough<sup>11</sup>.



In 2017, 56.4% of adults had excess weight (i.e. were either overweight or obese). This is lower than the national average (62%) but higher than the London average (55.9%).



In 2017/18, 20% of children aged 4 -5 had excess weight which is lower than the London (21.8%) and national average (22.4%).



In 2016/17, there were 29% of adults who were physically inactive, which is significantly higher than both London as a whole (23%) and England (22%).



15% of adults aged 18+ smoke tobacco, which is higher than the London and national average.

<sup>11</sup> Barnet Dementia Needs Assessment (2019)



In 2014, approximately 8.1% of Barnet adults reported drinking over 14 recommended units of alcohol per week which was the lowest of all the 32 London Boroughs and significantly lower than both London (21.6%) and England (25.7%).



There are significant levels of inactivity in Barnet. Approximately 38% of the population participate in activity at least once a week (moderate intensity for 30 minutes or more), 17% participate in a physical activity 3 or more times a week and 52% do not take part in any physical activity<sup>12</sup>. Physical activity is higher amongst men than women.

#### Health and Social care

Based on 2019 projections, Barnet has a higher proportion of adults with a learning disability (LD) than any London Borough of which 84% are aged 18-64 and 16% are aged 65+.

With the growth of the older population in Barnet and the associated rise in the number of people living with long term conditions and living longer with disabilities, there is likely to be ongoing pressure on care provision within the Borough.

Between 2015 and 2018, the number of long term service users in receipt of community care services in the Borough increased across all adult age groups (18+).

For younger adults aged 18-64 (where the main primary support reasons are learning disability, mental health and physical support), the number

of long term service users receiving community care services rose by 13%. The number of older adults (aged 65+) receiving such services (where physical support is the main primary support reason, followed by support for memory and cognition, mental health and learning disability) increased by 5%.

<sup>12</sup> Sport England – Active People Survey Data (APS), Quarter 2 (April 14/2015)