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## 1. Introduction

1.1 GVA prepared the Retail Impact Assessment in support of the residential led mixed use redevelopment of the former Peel Centre site in Colindale. Consultation representations have since been received on the application submission material, and this Supplementary Report on Retail Issues addresses the key points raised. These can be summarised as follows:

- The proposed level of floorspace exceed that identified in the Colindale Area Action Plan (March 2010) and a sequential site assessment should be undertaken;
- The proposed level of floorspace exceeds that identified in the Colindale Area Action Plan (March 2010) and should be subject to further impact testing;

1.2 Contrary to the points made, we believe the proposals are in accordance with policy and are not therefore required to undertake a sequential and impact test. We explain our reasoning in this report. Nevertheless, we do provide a full sequential and retail impact assessment in order to respond in full to the points raised during the consultation process.

1.3 The next section provides a detailed overview of the conclusions and justifications drawn in the Retail Impact Assessment. Section 3 addresses sequential and impact issues responding to the consultation representations. Section 5 sets out our conclusions.

## 2. Retail Floorspace Justification

### Area Action Plan Retail Floorspace Allocation (AAP)

- 2.1 The Colindale Opportunity Area is confirmed as being the focus for the creation of a new neighbourhood centre incorporating around 5,000 sq m gross of convenience and comparison retail floorspace, including a foodstore up to 2,500 sq m net. Paragraph 7.3.9 of the AAP confirms that these figures are derived from the 'Retail Provision Report', February 2008, which projects the amount of retail floorspace required to meet the predominantly everyday retail needs of those who will reside in the AAP area.
- 2.2 Paragraph 7.3.9 of the AAP explains that this level of retail floorspace is "dictated by the housing growth planned", i.e. 10,000 new homes. It adds that this assumption is important as this approach theoretically has no impact on the vitality and viability of existing centres because it only caters for demand generated within the Colindale AAP area.
- 2.3 It should be noted that the Retail Provision Report, February 2008, states that other retail uses (e.g. A3/4/5) would be 'in addition' to the level of need identified i.e. 5,000 sq m gross. The 5,000 sq m gross is comprised of A1 convenience and comparison floorspace only.

### Application Proposals, Retail Floorspace

- 2.4 The proposed development comprises up to 7,000 sq m gross of A1/2/3/4 retail floorspace, including a foodstore of up to 3,000 sq m net (c.3,750 sq m gross assuming an 80% net:gross ratio).
- 2.5 To enable a direct comparison with the AAP retail allocation of 5,000 sq m gross A1 a proportion of the proposed floorspace must be deducted, i.e. the proportion to be occupied by non-A1 uses. At this outline stage, the composition of floorspace within the proposed retail element remains flexible, but to provide a broad indication, it is possible to draw on published data.
- 2.6 The national average floorspace breakdown derived from Experian, for example, confirms that 68% of town centre floorspace is occupied by A1 and 'vacant' uses, and 32% is occupied by non-A1 uses.

- 2.7 We have deducted 32% of floorspace from the proposed total of 7,000 sq m gross which demonstrates that the total A1 convenience and comparison goods floorspace being proposed, excluding the non-A1 use class elements, would be in the region of 4,760 sq m gross.
- 2.8 Based on this assumption the level of A1 retail floorspace is less than that allocated in the AAP for a new neighbourhood centre; i.e. 5,000 sq m gross. The proposals are consistent with the AAP aspiration to meet the needs of the new local community, implementing the retail floorspace in one location to create one new 'sustainable and walkable' neighbourhood centre.
- 2.9 The proposals are also consistent with the AAP, which supports a sustainable mix of uses, over and above the allocated 5,000 sq m gross, to create a new, vibrant neighbourhood centre for Colindale (Policy 4.1(b)). Policy 4.1 and 4.7 confirms that this should include a range of associated retail, leisure and commercial floorspace to meet local needs.

#### Additional New Housing Growth

- 2.10 The submission Retail Impact Assessment made the point that the APP evidence based document, the 'Retail Provision Report', calculates need based entirely on the housing growth planned in the Colindale Opportunity Area. At that time the number of houses planned was 10,000, whereas the figures have now increased to 12,500 new homes as identified in the London Plan.
- 2.11 An increase in housing numbers will lead to an increase in expenditure available. We conclude that, based on the methodology underpinning the Council's own evidence base and AAP, there is a further need generated above the 5,000 sq m gross level identified. As set out in the submission Retail Impact Assessment (paragraph 4.7) the additional new housing will generate need for a further 2,600 sq m gross of A1 retail floorspace. Rather than the 5,000 sq m gross A1 need identified in the AAP, the additional housing growth has increased this level of floorspace need to 7,600 sq m gross A1.
- 2.12 The submission Retail Impact Assessment (paragraph 4.6) noted retail commitments within the AAP area at the Grahame Park site (815 sq m gross) and Colindale Hospital site (1,000 sq m gross). The level of need generated by the additional new housing (7,600 sq m gross) is more than sufficient to support the identified commitments and current proposals (6,575 sq m gross A1). As confirmed in paragraph 7.3.9 of the AAP this approach ["dictated by housing growth planned"] theoretically has no impact on

the vitality and viability of existing centres because it only caters for demand generated within the Colindale AAP area.

### Summary

- 2.13 The AAP promotes a retail floorspace allocation of 5,000 sq m gross (A1), supported by other 'additional' non-A1 shops, leisure and service uses. This figure was calculated from the growth in planned housing (10,000), and is conservative given the identification of additional housing in the London Plan (12,500).
- 2.14 The application proposes 7,000 sq m gross of retail floorspace; and to enable a direct comparison with the AAP retail allocation we have made a 'national average' deduction for non-A1 uses. The floorspace mix within the proposals is flexible at this stage, but this approach allows a comparable indication of town centre mix.
- 2.15 On the basis of this calculation, the level of A1 convenience and comparison being proposed would be in the region of 4,760 sq m gross, i.e. less than the AAP allocation. The level of retail floorspace proposed is below that planned for in a single new 'neighbourhood centre' within the AAP area; it is retail policy compliant and the application proposals are not required to undertake a sequential or impact test. The remaining floorspace will be occupied by non-A1 uses, consistent with the policy aspiration to create a sustainable and vibrant neighbourhood centre as supported in the AAP.
- 2.16 Additional new housing growth generates a retail floorspace need sufficient to support both the proposals and identified commitments at Colindale Hospital and Grahame Park site.

### 3. Sequential and Impact Considerations

- 3.1 The previous section concludes that the application proposals are policy compliant and within the retail floorspace thresholds identified in the AAP. The application is not, therefore, required to undertake a sequential or impact test.
- 3.2 We emphasise that the proposals will have a positive impact within an identified 'Opportunity Area'. The NPPF requires Local Planning Authorities to adopt a positive approach to decision-taking and to apply a presumption in favour of sustainable development. The NPPF makes clear the Government's commitment to securing economic growth in order to create jobs and prosperity and to ensure that the planning system does everything it can to support sustainable economic growth. The application proposals are consistent with these objectives, and the retail/town centre floorspace is crucial to ensure the creation of a sustainable community amongst 12,500 new homes.
- 3.3 For information purposes only, and to respond in full to consultation representations, we comment on the sequential test and have undertaken a full, detailed retail impact assessment for both convenience and comparison/town centre goods. We set out the findings in the remainder of this section.

#### Sequential Test

- 3.4 As we have set out in earlier sections, the proposals are in accordance with the 'Colindale Area Action Plan', promoting the creation of a sustainable and mixed use neighbourhood centre within the Colindale Avenue Corridor of Change. The proposals are not therefore required to be assessed against the sequential test. In paragraph 24 of the NPPF, local planning authorities should only apply a sequential test to planning applications for main town centre uses that are not in an existing centre and are not in accordance with an up-to-date Local Plan.
- 3.5 The AAP area, which is also an Opportunity Area in the London Plan, has been identified to accommodate 12,500 new homes. The creation of a new neighbourhood centre, on the proposed retail site, forms a key part of the AAP and is crucial to ensure the emergence of a sustainable and vibrant new community. The application proposals are location specific and there are no alternative sequential sites that would otherwise meet the policy aspirations set out in the AAP.

### Convenience Goods Retail Impact Assessment

- 3.6 Detailed excel based impact modelling tables are attached in Appendix 1. We have adopted a conventional and widely accepted step by step methodology, consistent with best practice, which draws upon the results of household telephone surveys of existing shopping patterns to model the existing flow of available expenditure in the survey area.
- 3.7 The proposals are for a neighbourhood centre anchored by a foodstore (3,000 sq m net), and the catchment will be localised. We have identified three catchment areas with which to base our assessment on; The Proposal Site Area (which will benefit from new housing as set out in this application); The Colindale AAP Area (the wider Opportunity Area); and the Wider Catchment Area which equates to Zone 9 of the Barnet Retail Study (Appendix 2).
- 3.8 Population estimates have been taken from Experian Business Strategies, the Colindale AAP, and the Peel Centre development programme. Table 1, Appendix 1, demonstrates that the Colindale AAP will contribute around 28,000 additional people to the catchment area, equating to £24.1m of convenience goods expenditure by 2021, growing to £50.8m by 2031.
- 3.9 To put this in to context, we have estimated that the proposed convenience store will have a turnover of c.£28.8m in 2021, the 'Design Year' (Table 7, Appendix 1). The growth in expenditure driven by housing completions in the AAP area equates to almost £3m per annum, ensuring any small trade deficit will be short lived. The figures demonstrate a huge residual pot of convenience goods expenditure by 2031 (£22m), over and above the foodstore proposal.
- 3.10 Table 4, Appendix 2, apportions market shares to each identified retail destination in the wider Colindale catchment area drawing on the 2009 and 2008 Barnet and Brent Retail Studies. This demonstrates the turnover of Colindale and Burnt Oak; £2.7m and £20.7m respectively; and also the three main nearby foodstores, Sainsbury's, the Hyde (£50.2m), Asda, Capitol Industrial Park (£95.9m), and Morrison's, Honeypot Lane (£51.2m).
- 3.11 Table 6, Appendix 2, factors in the Morrison's commitment at Oriental City. The largest levels of impact are calculated to fall on the nearby Morrison's at Honeypot Lane and the substantially overtrading Asda at Capitol Industrial Estate. These are the closest stores performing the same function as the committed new Morrisons foodstore, and therefore the most likely destinations to experience trade diversion.
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- 3.12 In order to assess the likely impact of the proposal, we have estimated the turnover required to support the uplift in convenience goods floorspace proposed. Based on published foodstore data, we have assumed that the new foodstore will turnover at around £12,000 per sq m net (Table 7, Appendix 1). This has been applied to the net convenience goods sales floorspace of 2,400 sq m net, i.e. 80% of the total net sales floorspace assuming a small proportion will be allocated to the sale of non-food goods. The store will achieve a total turnover of £28.8m by 2021.
- 3.13 The proposed unit will anchor a neighbourhood centre and will comprise a modern format convenience store for both main food and top up food shopping trips. It will therefore compete directly with similar convenience goods foodstore destinations in the immediate vicinity, notably the Sainsbury's at the Hyde; Morrison's, Honeypot Lane and Asda, Capitol Industrial Park. Burnt Oak and Colindale are unlikely to be impacted upon given their role as small scale, local 'top up' convenience stores, i.e. a different role to the new foodstore being proposed.
- 3.14 Table 7, Appendix 2 assumes that the new store will achieve 95% of its turnover from within the Zone 9 catchment area (Appendix 2), and 5% from further afield given its location on the main road network (A5, Edgware Road). Given the similar roles, the model identifies that the greater share of impact will fall almost entirely on the Sainsbury's, The Hyde, Morrison's at Honeypot Lane, Asda at Capitol Industrial Park, and the committed Morrison's at Oriental City.
- 3.15 The model balances, in Table 8, the implementation of the foodstore with the growth in population arising from housing completions in the proposal site and wider AAP area. As a consequence, any small impact on neighbouring centres, i.e. Colindale and Burnt Oak, will be substantially outweighed by population and expenditure growth.
- 3.16 Table 9, Appendix 1, summarises the levels of convenience goods cumulative impact on the range of destinations in the wider catchment area. It is apparent that, given proximity and role, the greatest impact falls on out-of-centre foodstores including, Asda (18.6%), followed by Morrison's, Honeypot Lane (16.8%), Sainsbury's, The Hyde (9.9%), and Morrison's, Oriental City (11.5%).
- 3.17 Any small trade diversion from the nearest town centres (Colindale and Burnt Oak) is heavily outweighed by the growth in expenditure arising from housing completions in the AAP area. Table 9, Appendix 1, for example, identifies a 5.4% and 0.1% positive impact in Colindale and Burnt Oak respectively arising from the expenditure growth in the AAP area. The proposed foodstore will perform a main and top up shopping role
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and will be unlikely to compete with the type of convenience shop mix present in these two district centres, or others like it in the wider catchment.

- 3.18 We conclude that the proposed foodstore is policy compliant, will support the development of a sustainable neighbourhood and will not have a detrimental impact on the network of town centres. Moreover, any minimal impact will be quickly mitigated by the strong growth in population and expenditure.

#### Comparison Goods / Other Town Centre Uses

- 3.19 As set out in earlier sections, the proposals will have an A1 convenience and comparison goods floorspace of around 4,760 sq m gross. As noted earlier, the outline application remains flexible in terms of the mix of uses, but in order to undertake impact testing we have provided approximate floorspace levels based on national average published data.
- 3.20 The calculations indicate that the level of A1 comparison goods floorspace proposed would like be around 1,010 sq m gross once the foodstore (3,750 sq m gross) has been deducted. Unit sizes across the scheme will vary, but based on an approximate unit size of 200 sq m gross, the scheme could accommodate 5 small unit shops; negligible compared to the number in Colindale (85 units) and Burnt Oak (210 units).
- 3.21 Based on a turnover of around £3,000 per sq m net, this element of floorspace would have a total turnover of c.£2.4m in 2021 (808 sq m net). This is negligible given the growth in comparison goods expenditure driven entirely by housing completions in the AAP area; £46.9m by 2021, growing to £124.2m by 2031. Such expenditure growth will more than support the comparison goods element of the foodstore also (c.600sq m net / c.£2.4m), which would, in any event, compete directly with nearby out-of-centre foodstores selling the same range of goods.
- 3.22 Taking the unrealistic, but 'worst case impact' scenario, the proposals would have a comparison goods turnover of c.£12m if all of the floorspace over and above the foodstore were occupied by comparison A1 uses. This figure remains insignificant when compared to the growth in comparison goods expenditure within the AAP area by 2021 (£46.9m); growing again to £124.2m by 2031. As we have already emphasised, it is unrealistic to assume that 100% of town centre floorspace would be occupied entirely by A1 uses. Town centres require a mix of retail and service uses to ensure they are commercially viable, vibrant and sustainable, meeting the everyday needs of a local community.

- 3.23 Retailer representation in local shop units are likely to offer the same range of 'everyday' services as other, nearby and similar town centres. Trade diversion and shop closures are therefore unlikely as each destination continues to serve their local neighbourhood. The strong levels of expenditure growth will only enhance the performance of existing floorspace. The turnover of Colindale and Burnt Oak, for example, is likely to grow as a consequence of the AAP proposals, and it would be highly unlikely for either centre to experience a negative impact as a consequence.
- 3.24 Sustainable neighbourhoods and town centres require a mix of shops and service uses to be vital and viable, as encouraged in the NPPF. The proposals include a mix of non-A1 retail and service floorspace uses, equating to around 2,240 sq m gross of retail floorspace (i.e. 32% of 7,000 sq m gross). Again, incorporating a unit size of 200 sq m gross, this equates to around 11 small unit shops to be occupied by operators including cafes, restaurants, recruitment services, banks and building societies, and other financial services, for example.
- 3.25 The number of non-A1 units within the application proposals is minimal given the scale of Colindale and Burnt Oak (85 and 210 units respectively). Moreover, the number of units proposed is important to deliver an appropriate mix of uses to ensure a viable town centre meeting the needs of the new local community. There will be no detrimental impact arising from the small mix of non-A1 floorspace.
- 3.26 A further contextual point can be provided by drawing on Table 4.1 of the GLA 'Town Centre Classifications Core Indicators and Broad Thresholds', as set out in the London Town Centre Health Checks, 2013. This clarifies that a District Centre would be expected to have up to 50,000 sq m of town centre floorspace, and 35,000 sq m of retail floorspace, i.e. substantially above that proposed within the Colindale neighbourhood centre. Based on unit number and floorspace thresholds, we conclude that the application proposals are entirely in line with the scale of a neighbourhood centre.

## 4. Conclusions

- 4.1 GVA prepared the Retail Impact Assessment in support of the residential led mixed use redevelopment of the former Peel Centre site in Colindale. Consultation representations have since been received on the application submission material, and this Supplementary Report on Retail Issues addresses the key points raised, i.e. scale of floorspace, sequential and impact issues.
- 4.2 In terms of floorspace, the AAP promotes a retail floorspace allocation of 5,000 sq m gross (A1), supported by other 'additional' retail, leisure and service uses. The retail floorspace figure of 5,000 sq m gross was calculated from the growth in planned housing, and is conservative given the identification of additional housing in the London Plan.
- 4.3 The application proposes 7,000 sq m gross of A1/2/3/4 retail floorspace. To enable a direct comparison with the AAP retail allocation of 5,000 sq m gross we have made a deduction for non-A1 uses. At this outline stage, the composition of floorspace within the proposed retail element remains flexible, but to provide a broad indication, it has been possible to draw on published data.
- 4.4 On the basis of this calculation, the level of A1 convenience and comparison being proposed would be in the region of 4,760 sq m gross, i.e. less than the AAP allocation. The level of retail floorspace proposed is below that planned for in a single new 'neighbourhood centre' within the AAP area; it is retail policy compliant and the application proposals are not required to undertake a sequential or impact test. The remaining floorspace will be occupied by non-A1 uses, consistent with the policy aspiration to create a sustainable and vibrant neighbourhood centre as supported in the AAP.
- 4.5 The application is retail policy compliant and consistent with the scale of retail floorspace identified in the AAP. *The application proposals are not required to undertake a sequential or impact test.* For information purposes only, and to respond in full to consultation representations, we have commented on sequential issues and undertaken a full, detailed retail impact assessment for both convenience and comparison/town centre goods.
- 4.6 Sequentially, the proposed floorspace falls within the AAP thresholds, and are consistent with AAP strategic objectives. The proposed floorspace will meet the everyday needs of the a new community in a location specifically identified for its highly accessible credentials adjacent to Colindale tube station. The NPPF gives

preference to accessible sites, and we do not believe there are any alternative sequentially preferable sites with which to deliver the application proposals, whilst all achieving the policy aspirations set out in the AAP.

- 4.7 The impact assessments have demonstrated that impact will be negligible, and outweighed by the substantial growth in housing and expenditure arising in the Colindale AAP area. Rather than detrimental impact, Colindale and Burnt Oak will experience turnover growth as a consequence of a substantial uplift in population.

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A Bilfinger Real Estate  
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Report

**Appendices**

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Report

# Appendix 1

Convenience  
Goods Impact  
Assessment

## PEEL CENTRE: RETAIL IMPACT ASSESSMENT 2014

**TABLE 1**  
**SURVEY AREA POPULATION FORECASTS**

	<b>Proposal Site Area</b> Peel Centre Masterplan	<b>Colindale AAP Area</b> (excluding Peel Centre)	<b>Wider Catchment Area</b> Zone 9 of Barnet Retail Study	<b>Total</b>
2014	0	0	69,722	69,722
2019	1,721	8,008	74,536	84,265
2021	3,026	11,329	76,324	90,679
2026	6,525	15,368	80,546	102,439
2031	6,525	21,600	84,064	112,189

SOURCE: Population growth from Proposal derived from Peel Centre development programme. Population growth in PCA comprises the balance of growth planned in the Colindale AAP area (excluding Peel Centre) as set out in the AMR 2012/13 Housing Trajectory. Projection assume an average occupancy rate of 2.25 persons per dwelling. Population growth in SCA is ONS trend based data of existing households and is taken from Experian Business Strategies June 2014.

## PEEL CENTRE: RETAIL IMPACT ASSESSMENT 2014

Convenience Goods

**TABLE 2**  
**Per Capita Convenience Goods Expenditure (2012 Prices)**

Growth in convenience goods spending per capita:			
2012-2013	-0.6% pa		
2013-2014	-0.3% pa		
2014-2015	0.1% pa		
2016-2029	0.8% pa		
	Proposal Site Area	Colindale AAP Area	Wider Catchment Area
<b>2012</b>	£1,699	£1,699	£1,699
<b>2014</b>	£1,684	£1,684	£1,684
<b>2014 Minus SFT at 2.7%</b>	<b>£1,639</b>	<b>£1,639</b>	<b>£1,639</b>
<b>2021</b>	£1,768	£1,768	£1,768
<b>2021 Minus SFT at 4.6%</b>	<b>£1,687</b>	<b>£1,687</b>	<b>£1,687</b>
<b>2026</b>	£1,840	£1,840	£1,840
<b>2026 Minus SFT at 5.1%</b>	<b>£1,746</b>	<b>£1,746</b>	<b>£1,746</b>
<b>2031</b>	£1,915	£1,915	£1,915
<b>2031 Minus SFT at 5.6%</b>	<b>£1,808</b>	<b>£1,808</b>	<b>£1,808</b>

Source: Experian Micromarketer, June 2014 / Experian Retail Planner 11

**TABLE 3**  
**SURVEY AREA RETAIL EXPENDITURE FORECASTS (£m, 2012 prices)**

	Proposal Site Area	Colindale AAP Area	Wider Catchment Area	TOTAL
<b>2014</b>	£0.0	£0.0	£114.3	£114.3
<b>2021</b>	£5.1	£19.1	£128.8	£153.0
<b>2026</b>	£11.4	£26.8	£140.7	£178.9
<b>2031</b>	£11.8	£39.0	£152.0	£202.8

Source: Tables 1 and 2



## PEEL CENTRE: RETAIL IMPACT ASSESSMENT 2014

Convenience Goods

**TABLE 4**  
**CONVENIENCE GOODS ALLOCATION 2014: BASE POSITION ASSUMING NO DEVELOPMENT**  
**MARKET SHARE (%) AND SPEND (£M)**

	Proposal Site Area		Colindale AAP Area		Wider Catchment Area		Inflow		TOTAL TURNOVER (£M)
	MARKET SHARE %	TURNOVER (£M)	MARKET SHARE %	TURNOVER (£M)	MARKET SHARE %	TURNOVER (£M)	%	(£M)	
<b>Centres</b>									
Brent Cross Regional Shopping Centre	-	-	-	-	2.3%	£2.6	93%	£33.3	£35.9
Edgware Major Centre	-	-	-	-	8.6%	£9.8	88%	£68.9	£78.7
Brent Street District Centre	-	-	-	-	1.1%	£1.2	92%	£13.5	£14.7
Chipping Barnet District Centre	-	-	-	-	1.6%	£1.9	94%	£26.7	£28.6
Colindale District Centre	-	-	-	-	1.3%	£1.5	22%	£0.4	£1.9
Burnt Oak District Centre	-	-	-	-	9.9%	£11.3	34%	£5.7	£17.0
North Finchley District Centre	-	-	-	-	1.1%	£1.2	97%	£45.1	£46.3
Whelstone District Centre	-	-	-	-	1.7%	£2.0	92%	£23.3	£25.3
Hendon Central District Centre	-	-	-	-	0.3%	£0.4	66%	£0.7	£1.1
<b>Out of Centre Stores</b>									
Sainsbury's, The Hyde	-	-	-	-	9.5%	£10.8	73%	£29.5	£40.3
Tesco, Brent Cross Retail Park	-	-	-	-	0.8%	£0.9	96%	£22.2	£23.0
Waitrose, Mill Hill East	-	-	-	-	0.8%	£0.9	97%	£28.5	£29.4
Asda, Capitol Industrial Park (Brent)	-	-	-	-	26.9%	£30.8	63%	£53.3	£84.1
Morrisons, Honeypot Lane (Brent)	-	-	-	-	12.0%	£13.7	70%	£31.4	£45.2
<b>SUB TOTAL</b>					<b>77.8%</b>	<b>£88.9</b>		<b>£382.5</b>	<b>£471.4</b>
<b>TOTAL</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>100.0%</b>	<b>£114.3</b>		<b>£382.5</b>	<b>£471.4</b>

Source: Market shares within SCA taken from 2009 Barnet Retail Study. Inflow derived from results of 2009 Barnet Retail Study and 2008 Brent Retail Study. Total spend derived using Table 3.

## PEEL CENTRE: RETAIL IMPACT ASSESSMENT 2014

Convenience Goods

**TABLE 5**  
**CONVENIENCE GOODS ALLOCATION 2021: BASE POSITION ASSUMING NO NEW DEVELOPMENT**  
**MARKET SHARE (%) AND SPEND (£M)**

	Proposal Site Area		Colindale AAP Area		Wider Catchment Area		Inflow		TOTAL TURNOVER (£M)
	MARKET SHARE	TURNOVER	MARKET SHARE	TURNOVER	MARKET SHARE	TURNOVER	%	(£M)	
	%	(£M)	%	(£M)	%	(£M)			
<b>Centres</b>									
Brent Cross Regional Shopping Centre	-	-	1.5%	£0.3	2.3%	£2.9	93%	£37.51	£40.7
Edgware Major Centre	-	-	7.0%	£1.3	8.6%	£11.1	88%	£77.7	£90.1
Brent Street District Centre	-	-	0.5%	£0.1	1.1%	£1.4	92%	£15.2	£16.6
Chipping Barnet District Centre	-	-	0.5%	£0.1	1.6%	£2.1	94%	£30.1	£32.3
Colindale District Centre	-	-	3.0%	£0.6	1.3%	£1.7	22%	£0.5	£2.7
Burnt Oak District Centre	-	-	8.0%	£1.5	9.9%	£12.7	34%	£6.5	£20.7
North Finchley District Centre	-	-	0.5%	£0.1	1.1%	£1.4	97%	£50.8	£52.3
Whelstone District Centre	-	-	0.5%	£0.1	1.7%	£2.2	92%	£26.3	£28.6
Hendon Central District Centre	-	-	0.2%	£0.0	0.3%	£0.4	66%	£0.8	£1.3
<b>Out of Centre Stores</b>									
Sainsbury's, The Hyde	-	-	25.3%	£4.8	9.5%	£12.2	73%	£33.2	£50.2
Tesco, Brent Cross Retail Park	-	-	0.5%	£0.1	0.8%	£1.0	96%	£25.0	£26.0
Waitrose, Mill Hill East	-	-	0.5%	£0.1	0.8%	£1.0	97%	£32.1	£33.2
Asda, Capitol Industrial Park (Brent)	-	-	22.0%	£4.2	26.9%	£34.7	62%	£57.1	£95.94
Morrisons, Honeypot Lane (Brent)	-	-	10.0%	£1.9	12.0%	£15.5	69%	£33.8	£51.2
<b>SUB TOTAL</b>			<b>80.0%</b>	<b>£15.3</b>	<b>77.8%</b>	<b>£100.1</b>		<b>£426.5</b>	<b>£541.9</b>
<b>TOTAL</b>	<b>-</b>	<b>-</b>	<b>100.0%</b>	<b>£19.1</b>	<b>100.0%</b>	<b>£128.8</b>		<b>£426.5</b>	<b>£541.9</b>

Source: Projected 'baseline' market shares for planned population growth expected in PCA is informed by 2009 Barnet Retail Study. Total spend derived using Table 3.

## PEEL CENTRE: RETAIL IMPACT ASSESSMENT 2014

Convenience Goods

**TABLE 6**  
**CONVENIENCE GOODS ALLOCATION 2021: BASE POSITION, WITH COMMITMENTS**  
**MARKET SHARE (%) AND SPEND (£M)**

	Proposal		Colindale AAP Area		Wider Catchment Area		Inflow		TOTAL TURNOVER (£M)
	MARKET SHARE	TURNOVER	MARKET SHARE	TURNOVER	MARKET SHARE	TURNOVER	%	(£M)	
	%	(£M)	%	(£M)	%	(£M)	%	(£M)	
Morrisons, Oriental City	-	-	20%	£3.9	18%	£23.2	30%	£11.6	£38.6
<b>Centres</b>									
Brent Cross Regional Shopping Centre	-	-	1.2%	£0.2	2.3%	£2.9	93%	£37.5	£40.6
Edgware Major Centre	-	-	5.6%	£1.1	8.6%	£11.1	88%	£77.7	£89.8
Brent Street District Centre	-	-	0.4%	£0.1	1.1%	£1.4	92%	£15.2	£16.6
Chipping Barnet District Centre	-	-	0.4%	£0.1	1.6%	£2.1	94%	£30.1	£32.3
Colindale District Centre	-	-	2.8%	£0.5	1.3%	£1.7	22%	£0.5	£2.7
Burnt Oak District Centre	-	-	7.8%	£1.5	9.9%	£12.7	34%	£6.5	£20.7
North Finchley District Centre	-	-	0.4%	£0.1	1.1%	£1.4	97%	£50.8	£52.3
Whelstone District Centre	-	-	0.4%	£0.1	1.7%	£2.2	92%	£26.3	£28.6
Hendon Central District Centre	-	-	0.2%	£0.0	0.3%	£0.4	66%	£0.8	£1.3
<b>Out of Centre Stores</b>									
Sainsbury's, The Hyde	-	-	24.3%	£4.6	9.0%	£11.5	73%	£33.2	£49.4
Tesco, Brent Cross Retail Park	-	-	0.4%	£0.1	0.8%	£1.0	96%	£25.0	£26.0
Waitrose, Mill Hill East	-	-	0.4%	£0.1	0.8%	£1.0	97%	£32.1	£33.2
Asda, Capitol Industrial Park (Brent)	-	-	19.0%	£3.6	16.9%	£21.8	76%	£57.1	£82.5
Morrisons, Honeypot Lane (Brent)	-	-	6.0%	£1.1	6.0%	£7.8	84%	£33.8	£42.7
<b>SUB TOTAL</b>			<b>89.4%</b>	<b>£13.2</b>	<b>79.3%</b>	<b>£78.9</b>		<b>£426.5</b>	<b>£518.6</b>
<b>TOTAL</b>	<b>-</b>	<b>-</b>	<b>100.0%</b>	<b>£19.1</b>	<b>100.0%</b>	<b>£128.8</b>		<b>£426.5</b>	<b>£518.6</b>

Source: Projected 'baseline' market shares for planned population growth expected in PCA is informed by 2009 Barnet Retail Study. Total spend derived using Table 3.

## PEEL CENTRE: RETAIL IMPACT ASSESSMENT 2014

Convenience Goods

TABLE 7

### PROPOSAL CONVENIENCE GOODS TURNOVER AT DESIGN YEAR (2021)

	Total Proposal			...from Proposal			..from Colindale AAP Area			...from Wider Catchment Area			...from Inflow	
	Floorspace	Turnover	Total turnover	Turnover of proposal derived from Peel Centre Masterplan area		Market share uplift from Proposal	Total turnover of proposal derived from PCA		Market Share Uplift From PCA	Total turnover of proposal derived from SCA		Market Share Uplift From SCA		
	Sqm (net)	£/sqm	£m	(%)	(£m)	(%)	(%)	(£m)	(%)	(%)	(£m)	(%)	(%)	(£m)
Foodstore	2,400	12,000	£28.8	15.0%	£4.3	85%	15.0%	£4.3	23%	65%	£18.72	14.5%	5%	£1.4
<b>Total</b>					£4.3	85%		£4.3	23%		£18.7	15%		£1.4

Notes: Assumes 80% of proposed foodstore will be used for the sales of convenience goods. Sales density for proposed foodstore taken as average of main operators. Sales density of small-scale turnover taken as GVA estimate

## PEEL CENTRE: RETAIL IMPACT ASSESSMENT 2014

Convenience Goods

**TABLE 8**  
**CONVENIENCE GOODS ALLOCATION 2021: WITH COMMITMENTS AND PROPOSED DEVELOPMENT**

	Proposal		Colindale AAP Area		Wider Catchment Area		INFLOW	TOTAL TURNOVER
	MARKET SHARE	TURNOVER	MARKET SHARE	TURNOVER	MARKET SHARE	TURNOVER		
	%	(£M)	%	(£M)	%	(£M)		
Proposed Foodstore, Peel Centre	85%	£4.3	23%	£4.3	15%	£18.7	£1.4	£28.8
Morrisons, Oriental City	4%	£0.2	14%	£2.7	15%	£19.7	£11.6	£34.2
<b>Centres</b>								
Brent Cross Regional Shopping Centre	0.1%	£0.0	0.4%	£0.1	2.2%	£2.8	£37.5	£40.4
Edgware Major Centre	0.1%	£0.0	3.1%	£0.6	8.1%	£10.4	£77.7	£88.7
Brent Street District Centre	0.0%	£0.0	0.4%	£0.1	1.1%	£1.4	£15.2	£16.6
Chipping Barnet District Centre	0.0%	£0.0	0.4%	£0.1	1.1%	£1.4	£30.1	£31.6
Colindale District Centre	4.0%	£0.2	2.7%	£0.5	1.3%	£1.7	£0.5	£2.9
Burnt Oak District Centre	2.0%	£0.1	7.6%	£1.5	£0.1	£12.7	£6.5	£20.8
North Finchley District Centre	0.0%	£0.0	0.4%	£0.1	1.1%	£1.4	£50.8	£52.3
Whelstone District Centre	0.0%	£0.0	0.4%	£0.1	1.7%	£2.2	£26.3	£28.6
Hendon Central District Centre	0.0%	£0.0	0.2%	£0.0	0.3%	£0.4	£0.8	£1.3
<b>Out of Centre Stores</b>								
Sainsbury's, The Hyde	0.5%	£0.0	19.3%	£3.7	6.5%	£8.3	£33.2	£45.3
Tesco, Brent Cross Retail Park	0.0%	£0.0	0.4%	£0.1	0.7%	£0.8	£25.0	£25.9
Waitrose, Mill Hill East	0.0%	£0.0	0.4%	£0.1	0.8%	£1.0	£32.1	£33.2
Asda, Capitol Industrial Park (Brent)	3.8%	£0.2	13.0%	£2.5	14.2%	£18.3	£57.1	£78.1
Morrisons, Honeypot Lane (Brent)	0.0%	£0.0	5.5%	£1.1	6.0%	£7.8	£33.8	£42.6
<b>SUB TOTAL</b>	<b>98.8%</b>	<b>£5.0</b>	<b>91.0%</b>	<b>£17.4</b>	<b>84.7%</b>	<b>£109.1</b>	<b>£439.5</b>	<b>£571.0</b>
<b>TOTAL</b>	<b>100.0%</b>	<b>£5.1</b>	<b>100%</b>	<b>£19.1</b>	<b>100%</b>	<b>£128.8</b>		<b>£571.0</b>

Note: Model takes into account negative impact arising from trade diversion as well as potential positive impact arising from 'unclaimed' residual convenience expenditure derived by Peel Centre rest

## PEEL CENTRE: RETAIL IMPACT ASSESSMENT 2014

Convenience Goods

**TABLE 9**  
**SUMMARY OF IMPACT AT DESIGN YEAR (2021)**

	NO NEW DEVELOPMENT	WITH COMMITMENTS	WITH COMMITMENTS AND DEVELOPMENT	Cumulative Impact	Cumulative impact
	Total turnover	Total turnover	Total turnover	(£M)	(%)
	(£M)	(£M)	(£M)		
Proposed Foodstore, Peel Centre	-	-	£28.80	-	-
Morrisons, Oriental City	-	£38.61	£34.18	-£4.4	-11.5%
<b>Centres</b>					
Brent Cross Regional Shopping Centre	£40.69	£40.63	£40.36	-£0.3	-0.8%
Edgware Major Centre	£90.06	£89.79	£88.68	-£1.4	-1.5%
Brent Street District Centre	£16.64	£16.62	£16.62	£0.0	-0.1%
Chipping Barnet District Centre	£32.31	£32.29	£31.65	-£0.7	-2.1%
Colindale District Centre	£2.71	£2.67	£2.85	£0.1	5.4%
Burnt Oak District Centre	£20.74	£20.71	£20.77	£0.0	0.1%
North Finchley District Centre	£52.31	£52.29	£52.29	£0.0	0.0%
Whelstone District Centre	£28.57	£28.55	£28.55	£0.0	-0.1%
Hendon Central District Centre	£1.29	£1.28	£1.28	£0.0	-0.6%
<b>Out of Centre Stores</b>					
Sainsbury's, The Hyde	£50.23	£49.40	£45.25	-£5.0	-9.9%
Tesco, Brent Cross Retail Park	£26.04	£26.02	£25.89	-£0.1	-0.6%
Waitrose, Mill Hill East	£33.19	£33.17	£33.17	£0.0	-0.1%
Asda, Capitol Industrial Park (Brent)	£95.94	£82.49	£78.06	-£17.9	-18.6%
Morrisons, Honeypot Lane (Brent)	£51.20	£42.71	£42.62	-£8.6	-16.8%
<b>SUB TOTAL</b>	£541.93	£557.24	£571.03		
<b>TOTAL</b>	<b>£541.93</b>	<b>£557.24</b>	<b>£571.03</b>		

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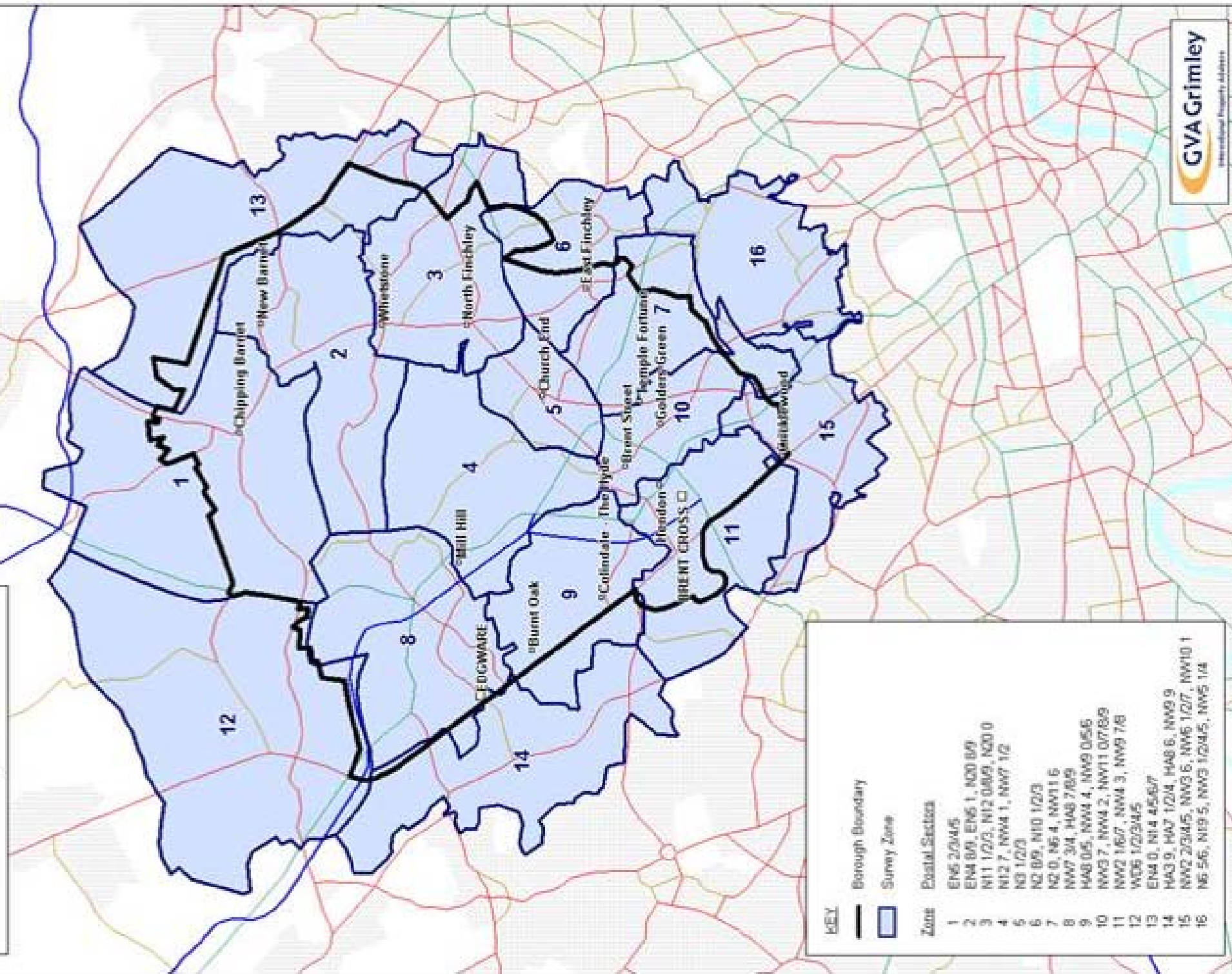
Report

## Appendix 2

Barnet Retail Study  
2009, Survey Area  
Plan

# BARNET RETAIL STUDY

## Study Area & Household Telephone Survey Zones



**KEY**

— Borough Boundary

■ Survey Zone

**Zone**

- 1 EN6 2JQ/4/5
- 2 EN4 8J, EN5 1, N20 8J
- 3 N11 1Z/3, N12 0J/9, N20 0
- 4 N12 7, NW4 1, NW7 1/2
- 5 N3 1Z/3
- 6 N2 8J, N10 1Z/3
- 7 N2 0, N5 4, NW11 6
- 8 NW7 3/4, HA8 7B/9
- 9 HA8 0/5, NW4 4, NW9 0/5/6
- 10 NW3 7, NW4 2, NW11 07/8/9
- 11 NW2 1/6/7, NW4 3, NW9 7/8
- 12 W06 1Z/3/4/5
- 13 EN4 0, N14 4/5/6/7
- 14 HA3 9, HA7 1Z/4, HA8 6, NW9 9
- 15 NW2 2/3/4/5, NW3 6, NW6 1Z/7, NW10 1
- 16 N6 5/6, N19 5, NW3 1Z/4/5, NW5 1/4

