Edgware Town Centre Economic Strategy

Edgware Bus Station & Garage

Boyer

Prepared on behalf of Transport for London | August 2020

TfL – Edgware Town Centre Economic Strategy

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APPENDIX

1. INTRODUCTION

Scope and Purpose

1.1 Boyer have been instructed by Transport for London Property Development (TfL PD) to consider the potential redevelopment of TfL's operational bus station and garage, alongside the adjacent shopping centre site. These sites together form a large part of Edgware town centre.

1.2 Our brief was to prepare an economic strategy that makes detailed recommendations for what redevelopment of these sites could include supporting a vibrant, viable and flexible town centre that is fit for the future. It is also intended that this document will support the preparation of a new Supplementary Planning Document for Edgware Town Centre.

1.3 Following this brief introduction, this report comprises the following sections and analysis.

1.4 Section 2 considers emerging trends in town centre development and identifies example schemes that show emerging trends in town centre regeneration and redevelopment to identify example projects that support the approach and mix of uses that could be taken in Edgware. TfL have prepared a suite of documents that present TfL's ambitions and aspirations for major redevelopment. These documents cover key issues, emerging trends, opportunities and constraints as well as best practice case studies that can apply to TfL developments and have been prepared by subject matter experts in a variety of town centre topic areas. These documents will also be considered in this section.

1.5 Section 3 provides a review of relevant planning policy and evidence base documents that relate to Edgware town centre.

1.6 Section 4 is a baseline review of Edgware town centre, which considers both quantitatively, and qualitatively the existing town centre composition, including the retail, commercial, leisure and workspace offer of Edgware. This section also identifies gaps in current provision that the proposed redevelopment can address to the benefit of the centre overall.

1.7 Finally, section 5 draws together the analysis from the preceding sections to provide suggested indicative land use component elements for the potential redevelopment scheme.

The Site

1.8 The site comprises the following main components:

- Edgware Bus Station & Garage
- The Broadwalk Shopping Centre

1.9 Edgware Bus Station and Garage is understood to be one of the busiest facilities on the TfL network with capacity for around 170 buses and serves as a major interchange with the adjoining Northern Line station.

1.10 The Broadwalk Shopping Centre is currently owned by Aberdeen Standard Investments, but a sale is being progressed to Ballymore. The Broadwalk Shopping Centre is a covered shopping mall anchored by a Sainsbury superstore with approximately 30 unit shops and mall kiosks. The overall retail floorspace is circa 20,000sqm and the centre is supported by around 1,200 car parking spaces which are used by shoppers and commuters.

1.11 The TfL land holding is highlighted in blue; and the Broadwalk Shopping Centre (BSC) is shaded red on the study site plan below. We have been advised that the combined site has an area of approximately 8.2 hectares and as such forms a major regeneration opportunity.

Fig 1. Edgware Study Site – Landholdings Plan

1.12 The site is centrally located within Edgware town centre area and the Broadwalk shopping Centre is part of the towns designated primary shopping frontage. To the south of the site there is another potential development site called Forumside which is likely to come forward for development within the next couple of years and development on that site and the Broadwalk Shopping Centre and TfL sites will need to be complementary.

1.13 The site and its physical relationship with the rest of Edgware town centre is shown on the extract plan below.

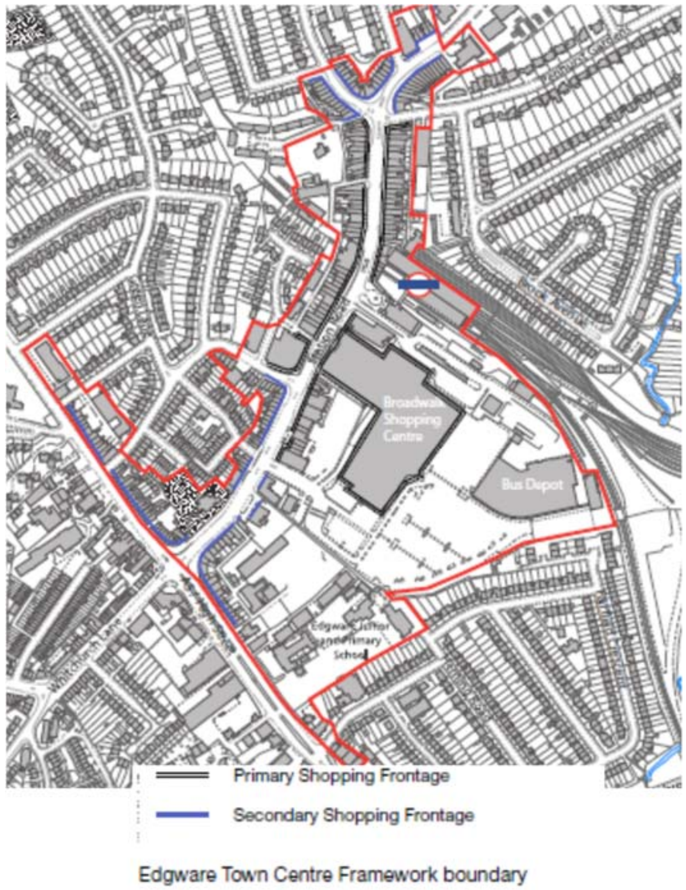

Fig 2. Edgware town centre (extract from Edgware town centre Framework (November 2012)

1.14 This report has been prepared in the peak initial period of Covid-19 and as such, the full economic impact of the pandemic and its effect on retailing and wider town centre issues is yet to be seen.

2. TOWN CENTRE MARKETPLACE & TRENDS

Introduction

2.1 In this section, we review town centre and retailing trends and consider the precedent of changing town centre uses from a retail centric position to a more mixed-use regenerative model. We consider work prepared for TfL regarding future direction for land uses and societal change and review examples of other town centre regeneration developments, as well as the proposed changes to the Use Classes Order recently set out by Government..

National Trends

2.2 Town centres, particularly in terms of retail, are very different now compared to ten, five or even three years ago; then retail was still considered the primary focus and function of a town centre. In policy terms, the main objective was, and in most instances remains, protecting and enhancing retail function.

2.3 A market commentary report published by Deloitte[1] advised that 2018 was the year that saw the most store closures and job losses since the 2008 global recession with the retail industry under continued and increasing pressure with many retailers finding themselves in a position with margins being squeezed between weakening demand and rising costs. Throughout 2019, the challenges to physical store retailers have continued and are expected to prevail for a number of years to come, with Covid-19 also likely to have a noticeable impact.

2.4 PWC[2] reported that in the first half of 2019 a net 1,234 stores disappeared from Britain's top 500 town centres compared with a 222-store loss over the equivalent period in 2017. Many national multiple retailers have found themselves struggling to pay their rents and other overheads (such as rising minimum wages, business rates, utility costs) and there have been a number of multiples challenging landlords to 'share the pain' and reduce rental levels or risk losing tenants altogether.

2.5 A consequence of these store closures is a number of towns have large units which are vacant and have limited or no market to take the space as the pool of potential retail occupiers (national chains) is diminishing and they are very cautious about committing to new store locations particularly in 'second' and 'third' tier town centres.

2.6 The response to these challenges for town centres has to come from a recognition that retail will no longer be the main and dominant component.

2.7 A combination of changing consumer habits with increasing on-line rather than physical in-centre shopping; national multiple retailer casualties; and increased experiential expectations combining leisure, socialising and shopping has led to wide recognition that the role of town centres is changing and the diversification of uses within town centres is needed to support their long-term vitality and viability.

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[1] https://www2.deloitte.com/tw/en/pages/consumer-business/topics/retail-wholesale-distribution.html?icid=top_retail-wholesale-distribution
[2] https://www.pwc.co.uk/industries/retail-consumer/insights/store-openings-and-closures.html

2.8 There will be continued structural change in UK retail through 2020 and beyond and occupier sentiment will remain very cautious. Affordability, sustainability of products and flexibility remain key themes for retailers. Profitability remains the key performance metric.

2.9 Retail performance will be strongest in London and the surrounding key urban locations, and this polarisation of major regional and sub-regional retail centres being ahead of other smaller centres will see prime retail outperform the rest.

2.10 The repurposing of retail floorspace will be a key trend over the coming years and this is most likely to be manifest in converting excess retail space to create mixed-use destination schemes.

2.11 UK retail will continue to weather a perfect storm that is bringing about fundamental changes to the sector through a combination of structural, cyclical and temporary factors. For landlords and investors the combined impact has seen rental values reduced and capital values of schemes consequently fall substantially. Negative returns are expected to continue in all but the strongest locations for a considerable period. The traditional expectation was that rental negotiations would result in increased values, however, these type of negotiations will become increasingly irrelevant and rental levels will be reflective of specific store profitability, alternative demand, and occupier desire to retain a particular store.

2.12 Commentators identify that non-prime retail is suffering from oversupply of space and high streets and shopping centres will be the hardest hit in terms of rental and capital values and potential for vacancy. This will be seen particularly where some multiple occupiers are under pressure to rationalise their portfolios to save cost in their struggle to avoid Company Voluntary Agreements (CVAs).

2.13 As a result, it is expected that excess retail space will be redeveloped and repositioned for alternative uses, increasing the number and quality of mixed-use schemes across the UK. Shopping centre and high street developers will be more inventive in using excess and under-utilised space, focussing on greater innovation and faster decision-making to enact change. It is strongly anticipated that mixed-use spaces will create consumer destinations that enhance the general shopping experience.

2.14 Across retail sectors the future is mixed and the primary influence will be how easy or otherwise it is to shop online compared to shopping physically for the goods being sold. For example, consumer demand for convenience will insulate the food and grocery sector from growth in ecommerce. The health and beauty sector should continue to benefit from the wellness trend and a focus upon experiential interactions. Therefore, reflecting this lifestyle, sports fashion, cosmetics, and health and beauty sectors are all likely to hold up well in trading terms and remain solid. Food and value / mixed retail businesses[3] are also expected to remain resilient.

[3] Variety type stores selling both food and non-food goods.

2.15 Those more exposed to direct online substitution such as electrical and personal finance will continue to see contraction in physical store space as these sectors have grown fastest online.

2.16 As a consequence, the pool of 'in the market' national multiple operators is reducing and their requirements are becoming more tightly focused around profitability metrics rather than geographic coverage.

2.17 Leisure and fitness operators continue to be very active both nationally (mainstream / budget) as well as in London (boutique, studio-based and mainstream). Leisure and fitness brands will benefit from additional opportunities from the breakup or reconfiguration of traditional A1 retail buildings and surplus department stores. Cinema operators are also active particularly the smaller format operators[4] focused upon a mixed operation of food and beverage together with cinema screens.

2.18 The food and beverage sector had been performing well with rapid expansion. However there has been a spate of recent outlet closures and parts of the casual and family dining sector are now struggling because of reducing discretionary spend by consumers and saturation within the segment. The sector does however have some encouraging signs elsewhere with evidence of micro-pubs, craft brewers and artisanal independent hot food 'pop-up' businesses taking over empty shops.

2.19 A further town centre trend which could be expected to trickle down from larger city locations is investment in and development of build to rent residential schemes and compact living (co-living and micro-living) within accessible town centres either as standalone developments or as part of mixed-use redevelopments.

2.20 The future prospects for the town centre market is somewhat mixed. Whilst food retailing and other experiential offerings are expected to continue at existing levels or with slight growth, other sectors are likely to reduce their physical presence on the high street. As a result, the expectation that retail will be the backbone of town centre offering will need to be reconsidered. The future is more likely to be a series of complimentary mixed uses, which will include retail but could equally be leisure, health and wellness, community space, employment and residential. Managing the change is likely to require temporary and flexible meantime / pop-up uses.

2.21 Government have recognised the issues facing town centres and responded with changes to Permitted Development Rights and Use Classes in the last couple of years. These include:

- Permitted change from A1, A2, A5 to B1(a)
- Residential conversions from A1, A2 and A5
- Temporary use of various business premises extended from two to three years and includes additional D1 classes including medical and health, art galleries, museums, public libraries and exhibition space.

2.22 Other measures include Business Rate relief for small town centre retailers/businesses that is attractive to local independent operators and stimulates demand for smaller sized units.

[4] E.g. Everyman and Picturehouse

2.23 The focus now on town centres is firmly upon flexibility of uses and policy is required to encourage and balance this mixed-use approach.

2.24 Town centre strategies need to focus and build upon local needs and the individuality of centres to ensure distinctiveness and relevance to their local communities. This not only applies to the development of new spaces and streets, but also to the enhancement, rejuvenation and repair of those existing areas in need of improvement such as the High Street. A range of uses in combination can act to provide interest and activity throughout the day and evening that supports vitality and viability.

Proposed Changes to the Use Classes Order

2.25 On the 20th July 2020 Government set out a series of changes to the current Use Classes Order (UCO), that are due to come into effect from 1st September 2020. This has the effect of combining many of the existing use classes into just three new ones:

- Class E (Commercial, business and service),
- Class F.1 (Learning and non-residential institutions); and
- F.2 (Local community).

2.26 The changes will combine shops (A1), financial / professional services (A2), cafés / restaurants (A3), indoor sports / fitness (D2 part), medical health facilities (D1 part), crèche / nurseries and office / business uses (B1) will be subsumed into a new single Use Class E.

2.27 Other changes introduce more restrictions rather than flexibility. Partly in response to the impact of Covid-19, there is added protection against the loss of learning, non-residential and community facilities, including museums public halls and local shops. These uses are now included in new Classes F1 and F2.

2.28 Other potential 'bad neighbour' town centre uses have been placed in the list of sui generis uses, with no permitted changes of use e.g. pubs / bars (A4), takeaways (A5), cinemas and live music venues; albeit that this is partly about protecting some of these uses as it is about ensuring changing to those uses requires planning permission.

2.29 Because of these changes to the UCO, there is now greater flexibility for different types of businesses to change use without the need for planning permission, as they would no longer be considered to constitute development.

2.30 This inherently embeds this flexibility into any proposals coming forward in Edgware town centre as a large proportion of the redeveloped floorspace would fall into Class E.

TfL Precedent Documents

2.31 We have been provided with a suite of precedent documents prepared for TfL that are forward looking and identify changes across a broad spectrum of land uses and issues from retail and workplaces to health, wellbeing and education. These documents are yet unpublished and were provided to us to assist our understanding of TfL's vision and longer-term goals. We have reviewed the documents below elements, which we consider are relevant to Edgware's regeneration.

Retail

- Less reliance upon big name anchor tenants;
- A shift towards individualism, personalisation of products, quality and range of services offered;
- Consumers willing to share personal data if they can see a clear benefit for them;
- Shopping more about experiences now, rather than purely buying things;
- Divergence between people wanting simple functional shopping when they want quick; convenience compared to in-depth experience when wanting to spend more time / money on something they are passionate about;
- Recent rapid increase in online shopping, not just for goods, but also grocery and cooked food being delivered; and
- Increase in concern about the sustainability of products and the ethos and business practices of the retailers providing the goods.

Culture:

- Is a an increasingly critical component in building the reputation of places;
- Underpins the night time economy;
- Can boost property values;
- Makes places better to live in / more attractive;
- There is value in attracting the right kind of cultural tenants and culturally-focused visitors, who in turn attract other high value businesses;
- Cultural venues and events are ways for retail destinations to deliver much needed distinctiveness;
- Policy makers are increasingly looking to support creatives' place in the city actively, whether through straightforward funding, planning rules, new property owning vehicles or partnering with developers to build in long-term cultural space; and
- Cultural organisations from museums to theatres to heritage sites are experimenting with virtual and augmented reality experiences and increasingly looking to take these into outdoor spaces.

Education:

- There is a disconnect between city regeneration and places for education;
- Retailers are increasingly becoming market place educators, and supporting customers with a range of supplementary informal learning services;
- Residential developers should also be considering how they can provide learning spaces for the community in their new developments; and
- Increasingly, our cities will require greater availability and access to extra-curricular learning spaces, fully integrated into urban development, and where possible maximising the efficiency of the existing educational estate.

Workplace:

- An increase in technology, interconnectedness and smart technologies that customises spaces to current needs, energy demands etc.;

- People are trading security for flexibility, whether working from home during off-hours, or navigating the gig economy to assemble a customised blend of workstyle and lifestyle;
- As fewer workers are required to be physically present in the office, owners can reclaim more space for amenities / other uses. These spaces also need to be more flexible in their design so companies can expand and grow as needed; and
- Younger employees want workplaces where they can excel at their jobs while also feeling connected to a greater purpose, including the company's mission as well as social and environmental impact.

Streetscapes:

- A successful streetscape is about a layering of systems together that uniquely interact to establish a space that responds to its context and the area's needs;
- A street that is designed to a human scale, is clutter free, flexible and positively impacts the social wellbeing of a city;
- Considering the space between buildings can be as important as focusing on the buildings themselves;
- Connection between destinations needs to be efficient for both the mode and the user; and
- Streets and the ground floor of buildings should coalesce so that a dynamic relationship between internal and external activity is created.

Social value:

- There will be a general acceptance that society cannot assume that people living close to, or below the poverty line will have their lives improved by the mere association with new development;
- Reduced central government support for local social intervention projects, particularly for larger towns and cities in the UK, has sharpened local planning authority interest in the social benefits of new development;
- There is growing interest in co-living and inter-generational developments that result in mix-communities;
- It is likely that climate change will influence people to focus more on their locality because the disruptive influences will discourage movement and dependence on resources that come from further afield; and
- Most people agree that people prefer cites that are permeable (easy to get around), safe, offer a richness of experiences, a means of financial support, and an environment that is pollution free and brings nature closer to the people.

Health and wellbeing:

- Positive benefits for various sectors include:
- Workplace: increased value linked to reduced absenteeism and increased productivity;
- Retail: increased trade due to footfall and dwell time when neighbourhoods improve walkability;

- Residential: increased value linked to desirability of improved health outcomes;
- Local area: economic benefit due to uplift in commercial, retail and residential values; and
- Green spaces must be designed to feel inclusive, safe and welcoming to all. The quality of public open spaces appears more important than quantity.

Sustainability & Climate Change

- Developments must integrate net zero, circularity and regenerative design principles to restore the environment and reduce our impact on climate change;
- Flexibility in developments is a key aspect of resilience, both in terms of external public space and within homes;
- Green space integrated or close to residential developments and strong community connections are highly valued;
- People and their communities will demand and expect more from new developments;

Impact of Covid 19

- Increase in home working / caring / schooling is likely to be permanent, particularly the longer the epidemic (and local lockdowns) continue;
- Although the past trend has been for high density living in flats in London being popular, there may be a shift towards more people wanting more personal (and outdoor) space as a result of being locked down for several months, alongside a recent (short term at least) 'flight to the suburbs / countryside'. This is linked with the point above.
- Climate change and Covid-19 are linked;
- We must approach climate change with the same urgency, speed and collaboration as we have the pandemic;
- This pandemic has shed light on the need for sustainability to underpin future developments;

2.32 The themes are all reflective of town centres being at the centre of activities with co-location of land uses leading to stronger, more cohesive communities that are more economically and social resilient.

Precedent Summary

2.33 The trends and particularly the precedent analysis highlights the major structural changes that are taking place within town centres and the shift away from retail as the primary activity; main motivation for town centre visits.

2.34 Change in town centre structure is being accelerated by the significant reduction in retail activity on the high street and a cultural shift led by consumers looking for cultural and social experiences that a wider mix of uses and activities within town centres can provide. Similarly, town centres as the focus of a transport network should be the focus for education and workplace where accessibility together with colocation drive footfall to support all businesses and services.

2.35 In order to facilitate this change there is a need for a more flexible planning policy approach. This should allow adaptation to accommodate these new and emerging trends that make positive contributions to town centre vitality and viability and through combined mixed uses which create vibrant places that people want to live and work within and visit for a range of social and cultural activities.

Recent Town Centre Regeneration and Redevelopment Schemes

2.36 The table below sets out the main components of a number of recently developed and permitted town centre regeneration schemes in London and the South East.

2.37 The schemes reviewed are not intended to be a direct comparators to the regeneration opportunity at Edgware as every regeneration and redevelopment will be different and reflect local circumstances and needs. The analysis shows the diversity of uses being included in these regeneration schemes and provides an indication of the approximate scale and proportions of each use. The table is a summary and more details on each of these schemes is provided in Appendix 1.

	Elephant & Castle	Addlestone One	Egham Gateway West	Crawley town centre	Bracknell town centre	Westgate, Dartford	Woking town centre	Barking town centre
Site area	No overall figure specified	2.5Ha	0.94Ha	Multiple sites	Not specified	2.5Ha	Multiple sites	13.8Ha
Residential – private	0 (0%)	160 (75%)	67 (66%)	437 (80%)	N/A	Unspecified	N/A	Up to 855 new homes
Residential - social	979 (100%)	53 (25%)	34 (34%)	109 (20%)	N/A	Unspecified	N/A	Up to 855 new homes
Residential – BTR	0 (0%)	0 (0%)	3,225sqm student accommodati on	0 (0%)	N/A	Unspecified	400+ units	Up to 855 new homes
B class employment	Around 175,000sqft (16,250sqm)	582sqm lost	76sqm	10,950sqm	N/A	N/A	N/A	Unspecified quantum for small and

	Elephant & Castle	Addlestone One	Egham Gateway West	Crawley town centre	Bracknell town centre	Westgate, Dartford	Woking town centre	Barking town centre
	of new leisure facilities, shops, cafes and restaurants							start-up businesses
Retail	Around 175,000sqft (16,250sqm) of new leisure facilities, shops, cafes and restaurants	6,996sqm retail uses (A1-A5) (net gain of 5,991sqm)	-1,066sqm net (A1-A5)	N/A	70 new retail and food and beverage outlets	Not specified	11,600sqm commercial space	Unspecified quantum
Food & beverage	Around 175,000sqft (16,250sqm) of new leisure facilities, shops, cafes and restaurants	6,996sqm retail uses (A1-A5) (net gain of 5,991sqm)	-1,066sqm net (A1-A5)	N/A	70 new retail and food and beverage outlets	New bars and restaurants	11,600sqm commercial space	Unspecified quantum

	Elephant & Castle	Addlestone One	Egham Gateway West	Crawley town centre	Bracknell town centre	Westgate, Dartford	Woking town centre	Barking town centre
Commercial leisure	1,000 seat multi-screen cinema	2,700sqm cinema	1,247sqm net gain.	N/A	12 screen cinema	Hotel and cinema	189-room Hilton Hotel	150 bed hotel, new music venue and cinema
Education	Multiple college and university buildings	N/A	N/A	N/A	N/A	N/A	N/A	A three-form entry primary school
Community facilities	500-audience capacity grass-roots cultural venue	115sqm district heating facility	N/A	New public spaces / squares	New / redeveloped public spaces and squares	New public square as well as potential health and wellbeing provision	N/A	New healthcare facility
Public transport	New Northern Line entrance	N/A	N/A	Remodelled railway station	£6.5 million extra investment in the highway infrastructure	N/A	N/A	

	Elephant & Castle	Addlestone One	Egham Gateway West	Crawley town centre	Bracknell town centre	Westgate, Dartford	Woking town centre	Barking town centre
Car parking	N/A	445 spaces (227 additional)	34 additional spaces	Not specified	3,800 car spaces provided in new or upgraded car parks	Multi-storey car park	740 additional spaces	

2.38 The town centre schemes reviewed highlight that there is flexibility and interchangeability within A class use categories and other commercial and leisure is a common element along with residential uses. This level of flexibility will only increase once the new Use Class E is implemented on 1st September and thuis Edgware will be able to follow suit in this regard.

2.39 Our research also considered food and beverage focused and ‘pop-up’ type developments. Examples of these include BoxPark (Shoreditch and Croydon), PopBrixton, Flat Iron Square (Southwark), Vinegar Yards (London Bridge), Buck Street Market (Camden) and Bang Bang Oriental (Colindale). These tend to be more informal and temporary type uses with a focus on food and drink but with market stalls and small units for retailers. These facilities are characterful and distinctive with predominantly independent vendors. More detailed descriptions of these schemes are also provided at Appendix 1.

Emerging Themes and Summary

2.40 The key points that can be taken from this section and are relevant considerations for the potential component of the redevelopment proposals for Edgware town centre are:

- The clear shift away from retailing being the dominant element of town centres;
- Uses other than retail can provide the attraction and critical mass necessary to anchor development;
- Greater diversity, mix and distinctiveness are key ingredients sought by consumer and attractive to operators and investors;
- Acceptance in policy terms that other town centre uses including food and beverage, commercial and leisure create and encourage footfall and contribute to vitality and viability;
- The high level of flexibility in terms of use class shown across many of the above schemes will be formally part of the planning system due to changes to the UCO that are due to take effect from 1st September 2020.
- Rental values can be stronger for non-retail uses;
- Temporary/meanwhile operations are attractive to consumers and allow business start-ups the opportunity to test ideas and concepts with limited cost exposure and flexibility to transition through to medium term and more permanent premises;
- Flexible and adaptable built floorspace and outdoor spaces;
- Reuse and repurposing existing buildings for more flexible space; and
- Residential uses including Build to Rent in sustainable well-connected and accessible locations are a valuable component of town centre regeneration.

2.41 The role of the high street is changing and a more diverse mixed-use environment is required where retail will continue to be important but leisure, education, community and commercial/office uses are as important for creating and maintaining vital, viable and sustainable town centres. In addition to this, residential development is becoming an ever-more critical component to drive both footfall and spend in town centres, by increasing the population in and surrounding it businesses. Now more than ever town centre services and the consumer experience is driving footfall as much as a town centres retail offering.

3. PLANNING POLICY & EVIDENCE BASE REVIEW

Introduction

3.1 There are a number of different documents at both the regional (London-wide) and local level that contain policies relevant to the redevelopment of this site.

3.2 In this section, we provide a review of LB Barnet and London-wide planning policy relevant to town centre development and consider the latest town centre/retail evidence base work for LB Barnet, particularly in relation to Edgware.

LB Barnet Policy

Barnet Core Strategy 2012

3.3 Adopted local policy is within the Barnet Core Strategy (2012). Within the Core Strategy Edgware is identified as a Major Centre that means it is an important shopping and service centre, often with a borough-wide catchment. Major centres attractiveness for retailing is derived from a mix of both comparison and convenience shopping and it is stated that such centres normally have over 50,000m^2 of retail floorspace. Edgware is described as having a wide variety of retail provision serving as a major centre.

3.4 Policy CS6 Promoting Barnet's town centres sets out some point that are specific to Edgware including:

- In order to promote competitive town centre environments and provide consumer choice, we will realise development opportunities for the town centres of Edgware. As part of this, the Council will pursue the individual planning objectives for each centre as set out in their Town Centre Framework and ensure the delivery of environmental, design, transport, car parking and community safety measures;
- Development in these town centres will reflect the preferred sequential approach in the NPPF; and
- Based on continued expenditure growth there is support for comparison goods provision in Edgware.

3.5 In addition, with regard to more general town centre matters and issues the policy states that the Council will:

- Promote successful and vibrant centres to meet the needs to residents, workers and visitors;
- Ensure that development is of an appropriate scale and character for the centre in which it is located;
- Ensure that food, drink and entertainment uses are part of a healthy evening economy in town centres and do not have a harmful effect on residents and the local area;
- Ensure the efficient use of land and buildings in all town centres, encouraging a mix of compatible uses including retail, managed affordable and flexible workspace, leisure and residential;
- Support retail uses in town centres by improvements to the public realm, the public transport network, short-trip parking and accessibility by cyclists and pedestrians; and

- Promote investment in the historic environment of town centres.

Barnet Development Management Policies (2012)

3.6 The Barnet Development Management Policies document provides more detailed policy and guidance for specific development proposals.

3.7 The main relevant policy from this document is DM11: development principles for Barnet's town centers. This highlights that the council will expect a suitable mix of appropriate uses as part of development within the town centres to support their continued vitality and viability. Pertinent details of this policies criteria and expectations are set out below.

'b: Primary and secondary frontages

A development proposal which reduces the combined proportion of class A1 retail use at ground floor level (including vacant) in the primary frontage below 75% will not be permitted…

A development proposal which reduces the combined proportion of class A1 retail use at ground floor level (including vacant) in the secondary frontage below 65% will not be permitted…

Change from a retail use (Class A1) will be strongly resisted unless it can be demonstrated that there is no viable demand for continued Class A1 use.

c: Mixed use development

ii. Appropriate mixed-use re-development will be expected to provide re-provision of employment use, residential and community use.

iii. The council will consider the location of new and the relocation of existing community, leisure and cultural uses (including arts) to the town centres only where they maintain active frontages.

Edgware Town Centre Framework (2013)

3.8 As set out in the previous section the role and function of town centers has evolved since this document was adopted in 2013 and as such, the document includes an outdated focus, particularly on retail and parking. The Council are currently preparing a new SPD for Edgware Town Centre to replace this version that is due for adoption in 2021.

3.9 In the 2013 document, the Broadwalk Shopping Centre and the adjacent Forumside sites, including the former Post Office and health clinic, are identified as key development opportunities.

3.10 The main proposals are to redevelop the area to include new linking streets to open up a currently cut-off area; and to provide improved pedestrian and cycle access and improve the station environment and the area around it.

3.11 The main issues identified are:

- Shop units along the high street are generally too small and do not have the necessary servicing facilities to accommodate modern retailers;
- The current comparison retail offer in Edgware is limited; and

- Many shoppers are choosing to shop in competing centres such as Brent Cross, Borehamwood and Watford.

3.12 The proposals identified within the Town Centre Framework for the Broadwalk Shopping Centre are:

- The car park site is most likely to suit an extension. This would enable new comparison retail floorspace to be delivered improving the retail offer for the town centre. Convenience retail floorspace expansion may also be considered in order to enable the comprehensive redevelopment of the site;
- Leisure uses such as a cinema and associated food and drink would also be considered appropriate on parts of this site;
- The area needs to be well connected to Station Road in order that it complements the existing shops and services and offers greater opportunities for easy access to the existing high street;
- Redevelopment of this site should work alongside development of the Forumside and former Post Office site to deliver a new route from Station Road to Heming Road; and
- The existing pedestrian route through the Broadwalk Shopping Centre should be extended through the new retail space to connect with the proposed new streets.

3.13 Any proposals for this site would also be expected to improve the existing entrance of the Broadwalk Shopping on Station Road to improve its relationship with the high street.

3.14 Any redevelopment of the site would continue to provide a similar quantum of car parking as currently exists. The dual function of the car parking spaces serving as both a commuter car park for TfL and wider town centre car park will also be required to be maintained.

3.15 For the Forumside Area the main issues are:

- There is a collection of sites around on the south side of Station Road that have been vacant and derelict for a number of years;
- This area, when combined with the shopping centre car park, makes up a large urban block within Edgware town centre that is underutilised and isolated from the surrounding area with few routes through it; and
- The sites are enclosed on the north west by Grade II Listed Railway Hotel and the three storey buildings fronting Station Road, to the south west by buildings fronting onto the A5, and to the south east by Edgware Junior and Infants Schools.

3.16 It is advised that this area is around 1ha and is in multiple ownerships including a significant area of land owned by Sainsbury's.

3.17 The proposals include:

- The site could incorporate residential-led development with an appropriate mix of town centre uses including a hotel use; and
- The redevelopment of the Forumside sites will be expected to aid the delivery of one of the new streets proposed.

3.18 The Framework strategy sets out the new infrastructure required / expected from the redevelopment of this area (Broadwalk and Forumside) of Edgware town centre:

- A new street from Station Road into the Broadwalk Shopping Centre site;
- Junction improvements along Station Road;
- A new street through Forumside connecting the Broadwalk Shopping Centre car park site to the A5;
- Improved public open space around Edgware Station;
- Improved public realm along Station Road;
- Improved bus interchange; and
- A new pedestrian/cycle route from Deans Lane to the town centre.

Emerging Draft Barnet Local Plan (2020)

3.19 The Council concluded a Regulation 18 consultation on its draft plan in March 2020.

3.20 Edgware continues to be identified as a Major Centre in the retail hierarchy and proposed policy GSS05 Edgware Growth Area sets out that the Council is seeking delivery of the following in Edgware town centre over the plan period:

- 5,000 new homes;
- Improved leisure options such as a new cinema, swimming pool and new eating-out options;
- Appropriate floorspace for community, retail and office uses;
- Improved public realm, including new public spaces;
- Transformation of the relationship between the rail and bus stations and the wider town centre to improve the pedestrian experience and reduce congestion;
- Retain existing levels of employment and pursue opportunities for new jobs.

3.21 In addition to this, the table at paragraph 15.4 of the Annex 1 sets out that this site is specifically identified (and potentially allocated in the Plan) as having an indicative residential capacity for 2,379 dwellings, and for 25% of the floorspace to be for retail, office, leisure and community uses, though no floorspace figures are provided for this.

3.22 In light of changes to the UCO as mentioned above, there is the potential for this proportion of floorspace to be delivered, however, the breakdown of the specific units may be less within the control of any proposed masterplans or specified proposals in future, due to the large degree of flexibility the new UCO offers. The vast majority of land uses likely to come forward in a town centre location like this (e.g. retail, office, restaurants etc.) would be able to change without planning permission, which whilst making it easier for space to be occupied by a greater number of businesses, would mean there is less control over the mix.

3.23 Overall, this should help make this 25% of floorspace be more viable, as it will be more attractive to investors due to a greater level of certainty as to being able to establish themselves in the commercial floorspace, without the need to apply for planning permission in advance.

3.24 In setting out the quantum of A class floorspace, to be delivered, Policy TOW01 Vibrant Town Centres sets out that the Council will promote the vitality and viability of the Borough's town centres by:

(a) Distributing growth by 2036 to meet the capacity for:

Up to 77,000m² (net) of Class A1 comparison retail floorspace

Up to 33,000m² (net) of Class A3-A5 floorspace.

Unless it can be demonstrated that there is a specific need, the Council will not support significant Class A1 convenience retail floorspace as there is no substantive quantitative requirement for this.

3.25 Part b of the proposed policy sets out some more detail for Edgware and cross references to Policy GSS05:

'ii) Edgware (see policy GSS05) where regeneration will consolidate the quantum of retail floorspace alongside improvements to the quality of the retail and leisure offer, whilst providing a range of community uses. New housing will also form a key part of significant growth of the local economy.'

3.26 Policy TOW2 sets out that the Council is continuing to take a percentage of designated frontages approach to allowing mixes of uses as part a) states:

Within Major and District Town Centres proposals that would reduce the combined proportion of A1 retail use at ground floor level (including vacant properties) in the town centre primary frontage below 65% will only be supported if criteria c) is met.

3.27 The specific criteria considerations that will be taken into account when assessing proposals that would reduce the proportion of A1 frontage to below 65% are set out below:

(c) Where proposals for alternative uses at ground floor level do not meet criteria (a) and (b) the Council will take the following into consideration:

Significance of reduction of retail facilities.

Loss of active frontage at ground floor level.

Whether alternative retail facilities are accessible by walking, cycling or public transport to meet the needs of the area.

Capability of the proposal in attracting visitors to the town centre.

Contribution of the proposal to the Council's growth objectives.

Evidence that there is no viable demand for continued Class A1 use and that the property has been vacant for over 12 months, with the exception of meanwhile uses in accordance with part h). Evidence of continuous marketing over a 12-month period will be required.

3.28 In light of the recent changes to the UCO highlighted above, it is likely that the above policies / subsections of policy will change in a future iteration of the Local Plan. This is because specifying a quantum or proportion of floorspace / frontages for A1 (and other) uses will no longer be possible under the revised UCO. There is the possibility of a distinction between the new use classes and those remaining in the Sui Generis category however.

3.29 Other relevant policies within the emerging Local Plan include

- Policy TOW3 Managing Clustering of Town Centre Uses that advises the Council will resist the cluster or over-concentration of A5 Hot food takeaways and Sui Generis betting shops, payday loan shops and shisha bars.
- Policy TOW04 Night-time Economy sets out that The Council will support proposals for night-time economy uses in Barnet's Town Centres including Edgware.

London Plan

London Plan (2016)

3.30 Relevant policies within the London Plan include:

- 2.15 Town Centers. Part A of this policy sets out that the Mayor will, and boroughs and other stakeholders should co-ordinate the development of London's network of town centres so they provide:

- the main foci beyond the Central Activities Zone for commercial development and intensification, including residential development;

- the structure for sustaining and improving a competitive choice of goods and services conveniently accessible to all Londoners, particularly by public transport, cycling and walking; and

- the main foci for most Londoners' sense of place and local identity within the capital.

- Policy 4.7 Retail and town centre development. Part A of this policy is very similar in its aims to Policy 2.15 set out above.
- Policy 4.8 Supporting a successful and diverse retail sector and related facilities and services is similar to 2.17 and 4.7 above. Within Part B of the policy subsection g sets out further more detailed criteria and expectations for town centres which include:

- broader vitality and viability (Policy 2.15Ca)
- broader competitiveness, quality or diversity of offer (Policy 2.15Cc)
- sense of place or local identity (Policy 2.15Ac)
- community safety or security (Policy 2.15Cf)
- success and diversity of its broader retail sector (Policy 4.8A)
- potential for applying a strategic approach to transport and land use planning by increasing the scope for "linked trips" (Policy 6.1)
- role in promoting health and well-being (Policy 3.2D)
- potential to realise the economic benefits of London's diversity

Emerging New London Plan (2020)

3.31 The emerging New London Plan is currently on hold due to a direction from the Secretary of State (SoS). However, as it has been through multiple rounds of consultation and examination, the policies within it can be given weight in decision-making, particularly those that are not subject to dispute between the Mayor and the SoS.

3.32 On that basis, the following policies from the 'Intend to Publish' version of the London Plan are relevant.

3.33 Policy SD6 Town centres and High Streets sets out that centres should have a diverse range of uses including main town centre uses, night-time economy, civic, community, social and residential. As part of this, locations for mixed-use or housing-led intensification to optimise residential growth potential should be utilised. Developments should also strengthen the role of town centres as a main focus for Londoners' sense of place and local identity, as well as being the primary locations for commercial activity beyond the CAZ. It should be noted that Edgware is identified in the new London Plan (specifically Table A1.1) as a Major centre.

3.34 The policy goes on to state that the adaptation and diversification of town centres should be supported in response to the challenges and opportunities presented, including the change of use and intensification of identified surplus office space to other uses including housing. Furthermore, tourist infrastructure, attractions and hotels in town centre locations, especially in outer London, should be enhanced and promoted.

3.35 Policy SD7 Town centres: development principles and Development Plan Documents sets out that when considering development proposals, boroughs should take a town centres first approach, discouraging out-of-centre development. Part D of the policy stipulates that development should:

- ensure that commercial floorspace relates to the size and the role and function of a town centre and its catchment;
- ensure that commercial space is appropriately located and is fit for purpose, with at least basic fit-out and not compromised in terms of layout, street frontage, floor to ceiling heights and servicing;
- support efficient delivery and servicing in town centres including the provision of collection points for business deliveries in a way that minimises negative impacts on the environment, public realm, the safety of all road users, and the amenity of neighbouring residents; and
- support the diversity of town centres by providing a range of commercial unit sizes, particularly on larger-scale developments.

3.36 Policy SD9 Town centres: Local partnerships and implementation encourages the development of strategic partnerships to develop strong, resilient and adaptable town centres. Part B of the policy encourages the development of Town Centre strategies.

3.37 Part D (specifically sub section 2) of this policy also advises that Council's should take a proactive and partnership-based approach to bring sites forward for redevelopment, supporting land assembly in collaboration with local stakeholders.

3.38 Policy SD10 Strategic and local regeneration advises in Part C that development proposals should contribute to regeneration by tackling inequalities and the environmental, economic and social barriers that affect the lives of people in the area.

3.39 Policy T6.3 Retail parking states that the maximum parking standards should be applied to new retail development. New retail development should avoid being car-dependent and should follow a town centre first approach. It also notes that where shared parking is identified, overall provision should be reduced to make better use of land and more intensively use the parking that remains.

3.40 Policy GG1 Building strong and inclusive communities (subsection F) states that those involved in planning and development must promote the crucial role town centres have in the social, civic, cultural and economic lives of Londoners, and plan for places that provide important opportunities for building relationships during the daytime, evening and night time.

3.41 Policy SI 3 Energy Infrastructure states that Boroughs and developers should engage at an early stage with relevant energy companies and bodies to establish the future energy and infrastructure requirements arising from large-scale development proposals such Town Centres. They should in these instances develop ‘energy masterplans’ which establish the most effective energy supply options. This element should form part of any formal master planning for the area and inform the design and build out of any proposals.

3.42 Policy HC5 Supporting London’s culture and creative industries outlines that development proposals should protect existing cultural venues, facilities and uses where appropriate and support the development of new cultural venues in town centres. Alongside this, it states that Boroughs should consider the use of vacant properties and land for pop-ups or meanwhile uses for cultural and creative activities during the day and at night-time to stimulate vibrancy and viability and promote diversity in town centres.

3.43 Policy HC6 Supporting the night-time economy sets out that Boroughs should develop a vision for the night-time economy, supporting its growth and diversification, in particular within strategic areas of night-time activity (of which Edgware is defined as a Major centre in Table A1.1 of the Plan). In addition, town centre strategies should promote the night-time economy, diversify the range of night-time activities and protect and support evening and night-time cultural venues such as pubs, night clubs, theatres, cinemas, music and other arts venues.

3.44 Policy HC7 Protecting public houses states that in town centre strategies and planning decisions, boroughs should protect public houses where they have a heritage, economic, social or cultural value to local communities, or where they contribute to wider policy objectives for town centre. They should also support proposals for new public houses where they would stimulate town centres.

3.45 Policy S1 Developing London’s social infrastructure (at point E) advises that new facilities should be easily accessible by public transport, cycling and walking and should be encouraged in high streets and town centres.

3.46 Policy E1 Offices states that improvements to the quality, flexibility and adaptability of office space of different sizes should be supported by new office provision, refurbishment and mixed-use development, with one of the locations of focus being town centres.

3.47 Policy E9 Retail, markets and hot food takeaways sets out that a successful, competitive and diverse retail sector, which promotes sustainable access to goods and services for all Londoners, particularly for town centres. Development proposals should bring forward capacity for additional comparison and convenience goods retailing particularly in town centres. Development proposals involving the redevelopment of surplus retail space should support other planning objectives and include alternative town centre uses on the ground floor where viable.

3.48 Policy E10 Visitor infrastructure outlines that London's visitor economy and associated employment should be strengthened by enhancing and extending its attractions, inclusive access, legibility, visitor experience and management and supporting infrastructure. This includes the provision of high-quality convention facilities in town centres that should be supported.

3.49 Policy SD8 (subsection D) states that Major town centres should be the focus for the majority of higher order comparison goods retailing, whilst securing opportunities for higher density employment, leisure and residential development in a high quality environment.

3.50 The London Plan policies place increasing emphasis upon town centres as highly sustainable locations that should be the focus for a diverse mix of uses.

Town Centre Evidence Base

3.51 LB Barnet's latest town centre and retail evidence base document comprises the Town Centres Floorspace Needs Assessment prepared by PBA and published in December 2017.

3.52 The report considers the need for additional retail (comparison and convenience goods) and other town centre type uses within the borough up to 2036. The need calculations take account of existing levels of consumer spending and forecast levels of spending growth; market shares of existing town centres and other facilities in the borough and competition from outside the borough. A significant aspect to the retail need calculations is the potential increase in retailing at Brent Cross and scenarios have been considered where market share has been uplifted to reflect the increased attraction of an expanded Brent Cross.

3.53 The retail floor space and commercial need identified is as follows:

	Up to 2021	2036
Comparison Goods Shopping:		59,960sqm (net) constant or 76,725sqm (net) improved market share
Convenience Goods Shopping		Negative turnover capacity, therefore no quantitative need
Food and drink (from quantitative food & drink assessment)	Sufficient expenditure capacity in LBB to support an additional 4,120sqm Class A3-A5 floorspace	Grows to 33,300sqm
Cinema (from the cinema screen capacity assessment)	Suggests there is capacity to support an additional 10 screens in LBB, equivalent to a large multiplex cinema or up to five boutique cinemas.	Need increases to 14 screens.

3.54 It is also advised that as existing cinemas are concentrated in the east of the borough additional provision should be encouraged in the west.

3.55 PBA are cautionary regarding forecasting floorspace need over the period to 2036, advising that they do not consider the need for additional retail floorspace emerges until the end of the study period and that the figures provided should be treated as indicative.

3.56 With regard to Edgware specifically the executive summary document states:

Our health check identified that the centre [Edgware] is vital and viable. It has good representation from national multiples, including Marks and Spencer, which attract shoppers to the centre from the north western part of the borough. While the centre's comparison turnover is lower than North Finchley's despite that centre being smaller in overall terms, its location means that it primarily serves a different catchment, and their roles should be seen as spatially complementary.

There are a number of opportunities within the centre which if brought forward would assist in bolstering the role and function of Edgware, particularly if these developments were to enhance the centre's leisure and night-time economy, or provide larger-floorplate retail units which the centre is currently lacking. Notably, permission has now been granted on part of the Forumside, adjacent to Broadwalk Shopping Centre for mixed-use development to include a hotel.

There is a need for environmental improvements to improve circulation within the centre, to encourage shoppers out of the Broadwalk Shopping Centre into the rest of Edgware.

3.57 In the following section, we consider in more detail the evidence base work in relation to Edgware in terms of quantitative and qualitative composition and identified needs. However, it should be noted that the Marks and Spencer is no longer represented within Edgware.

Employment Evidence Base

3.58 LB Barnet's latest Employment Land Review (October 2017) was prepared by Ramidus Consulting.

3.59 The evidence indicates that Barnet does not have a particularly strong office market, and there are relatively few large, private sector employers instead small firms are most dominant and in recent years, the largest growth in the borough has been in self-employed, single person businesses.

3.60 The borough's employment base comprising a large number of smaller occupiers coupled with the adoption of technology and new business processes means that the need for B1 Office space is more focused upon smaller self-contained offices, flexible workspace and co-working space. It is suggested that smaller occupiers are looking to be a part of a 'business community', where they can interact with other businesses and enjoy flexible terms and many are turning to the rapidly expanding flexible space market. The ELR considers that such trends suggest that there might be a case for protecting larger, out-of-centre offices, particularly those offering flexible serviced or managed space.

3.61 The ELR also advises that the borough's stock of office space has been shrinking in recent years, mainly due to conversion of offices to residential development, because of the Permitted Development Rights that support this. The review concluded that best efforts should be made to defend employment land and Edgware is regarded as a location where existing offices are considered to be at high risk from Permitted Development Rights conversion.

3.62 A central theme from the ELR is the need for serviced offices and recognition of the emergence of co-working spaces which provide a 'less corporate' style of space than serviced offices, and respond to "technology enablement, the growth of the tech, online and creative industries.

3.63 The serviced office, hybrid and co-working business models are providing an important supplement to the traditional corporate office market. They are providing choice and flexibility for growing numbers of small businesses seeking to have a presence in the central London property market, on terms that suit their business models. At the same time, they are providing further agility and flexibility for larger corporate organisations. The key to their sustainability will be their resilience to property markets cycles.

3.64 Such uses are appropriate and can be brought forward within existing buildings in town centres or be delivered as part of mixed-use developments.

Summary

3.65 Overall, there are a number of policy documents at both the London and local level that support the redevelopment and intensification of town centre locations, particularly those with good access to public transport, as the proposal location has.

3.66 It is notable particularly in the London Plan that adaption and diversification are key component of town centre strategy to enable centres to respond to challenges and opportunities. The London Plan theme is around flexibility and broader (than retail) vitality and viability, competitiveness, quality and diversity of offer in town centres.

3.67 The local policies relating to town centres would support the development of both residential and commercial floorspace within Edgware town centre and there are specific references to the following potential uses:

- Evening Economy: Food, Drink, Entertainment;
- Leisure: Cinema, Swimming Pool;
- Cultural and Community Facilities;
- Hotel;
- Employment: Office, Managed Affordable and Flexible Workspace;
- Residential.

3.68 There is also a clear desire from the Council for a new network of smaller streets to be provided as part of the redevelopment of the area, as it is currently cut off and not well used, which is a significant under-utilisation of such a sustainably located series of sites.

3.69 The adopted and emerging local policy sets out specific targets for the maintenance and protection of retail provision. As we have identified in the previous section regarding trends in town centres; whilst retail uses will remain a key element of the high street it will no longer be the most dominant sector and the vitality and viability of town centres going forward will be underwritten by a combination of uses. This is a point echoed by the London Plan, and is reflected in recent changes to the UCO.

3.70 Therefore, the Council's approach in setting a threshold percentage requirement for maintaining retail frontage is out of step with current town centre context and fails to recognise the contribution that other A class, leisure, community and residential uses make to ongoing vitality and viability of town centres. In reality, such an approach could have a negative effect on town centres given the decline in retail activity on high streets; where voids cannot be re-let for A1 due to a lack of demand there could be pent up demand for other town centre type uses. In addition, as highlighted above, from 1st September 2020, it will not be possible to stop changes to use, as A1 will no longer exist as a separate use class.

3.71 Alongside the local policy, the supporting evidence base for retail / town centres and employment does indicate that there is a need for flexibility.

3.72 For retail and town centres the evidence base highlights a rapidly changing market and economic trends leading to restructuring of the retail and town centre uses market place and the potential for commercial leisure uses to take a growing share of space within town centres. The above highlights the opportunities to improve Edgware town centre through developments that enhance the centre's leisure and night-time economy, or provide larger-floorplate retail units which the centre is currently lacking.

3.73 Looking holistically, beyond the narrow focus of the retail evidence base and drawing upon the wider strategic function for town centres that the London Plan envisages, the opportunities for Edgware include improvement and new provision of culture, education and community uses. Such a mix of uses will widen attraction, increase diversity of function and promote resilience.

3.74 For employment, the Council's evidence base highlights the dominance within the office sector of SME's, small and micro businesses. These businesses have a requirement for flexible space that can range from serviced offices to shared and co-working spaces. Such uses are ideally suited to town centre locations given their high accessibility and sustainability and the availability of other related and supporting services and facilities.

3.75 It is also noted that in Policy TOW01 that Brent Cross is to provide a wider mix of uses that include office and other commercial uses (although Policy GSS05 Edgware Growth Area does include reference to office uses). Office and commercial uses should be added to Policy TOW01 for Edgware and reflected in the emerging SPD, as they will form part of the new Class E, and thus will be just as acceptable (in use class terms) as any of the other uses already listed in this policy.

4. EDGWARE TOWN CENTRE

Introduction

4.1 In this section, we consider the role and function of Edgware town centre. The composition of the town centre is assessed having regard to available published data on vitality and viability indicators. We also review the retail and other town centre use offering within the town to identify any particular gaps, deficiencies or under-representation.

4.2 This section has been prepared utilising data from published sources and some primary research. A copy of the latest Goad town centre plan for Edgware is provided at Appendix 2.

Competition

4.3 Edgware's designation as a major centre places it toward the top of the London based hierarchy of town centres. The categories above are International and Metropolitan.

4.4 Edgware is in competition with Brent Cross, which although not a designated town centre is at a level of retail offer and function equivalent to a metropolitan centre and is a very dominant retail (and leisure) destination.

4.5 Within the wider geographical area, Edgware is in competition with Watford, Borehamwood and Harrow. Central London is also easily accessible (approximately 40 minutes on the underground from Edgware Station).

4.6 Edgware's proximity to Brent Cross and other large centres has a limiting factor upon its potential to attract higher order national multiple comparison retailers and therefore its profile is mainstream and value national multiple comparison shopping together with local independents.

4.7 Given the competition, which will potentially be, strengthening with proposals for Brent Cross / Cricklewood it is important that Edgware continues to meet the needs of its support population and has shops, services and facilities that meet current needs and future expectations. Indeed, because of the competition Edgware needs to have a strategy and find a niche or element of differentiation that will give the town centre a uniqueness that will attract visitors and ensure they continue to return.

Edgware Town Centre Review

4.8 Below we consider the health of Edgware town centre based upon available information for various vitality and viability indicators. We use as a baseline information within the 2017 PBA work prepared for LBB and update this to show change over the period to now.

Composition Analysis

4.9 The 2017 Study by PBA considered composition and diversity of use within Edgware. They advised that:

Edgware is a larger centre providing a greater range of retail shops including a substantial independent provision alongside multiple retailers situated within the Boardwalk Shopping Centre. The centre also provides a substantial range of retail and other services as well as a range of cafes and restaurants as well as some leisure offer. This ensures that the centre performs a greater than District level function, also drawing custom from residents in LB Harrow and LB Brent.

4.10 We have analysed the latest available Goad Plan for Edgware (Feb 2019) and set out below a list of the main national multiple retailers within the town centre.

Edgware National Multiple Traders (Feb 2019)		
Within Broadwalk Shopping Centre		
Robert Dyas	Vision Express	Claire's
Superdrug	Boots	WH Smith
Specsavers	JD Sport	Game
EE	Poundland	New Look
Holland & Barrett	O2	Sainsbury
Three	Card Factory	
Rest of Town Centre		
Argos	Tesco Express	Lidl
Carphone Warehouse	Ryman	Iceland
Greggs	Peacocks	Poundland

4.11 The majority of A1 use class national multiples are located within the Broadwalk Shopping Centre. Overall the profile of national retailers is mainstream and value with very limited clothing/fashion and even though it is understood that TK Maxx are to occupy the former M&S store in the Broadwalk Centre for a town of its size and status Edgware has limited choice.

4.12 There are a range of national banks and building society branches and the number of national betting shops is notable, with some having two outlets within the town.

4.13 The provision of A3-A5 uses in the town centre is dominated by local independents, the national operators present are primarily coffee shop chains (Costa, Cafe Nero, Starbucks) and takeaway food outlets (Subway, KFC) and Nando's is the only casual dining multiple present. For a centre of its size and status, this level of provision falls below expectation, particularly restaurants. However, there are a number of independent restaurants operating within the centre.

4.14 A plan showing the distribution of A1 use class premises throughout the town centre is shown below. This highlights the min concentration of retail is within the Broadwalk Shopping Centre and in the northern parts of the town centre. The southern portion of the town has a more mixed composition with more A2-A5 and other uses.

Fig 3. Edgware town centre A1 use distribution (Edgware Goad Plan Feb 2019)

4.15 The distribution of A3-A5 uses within the town centre is shown on the plan below.

Fig 4. Edgware town centre A3-A5 use distribution (Edgware Goad Plan Feb 2019)

4.16 Commercial leisure provision within the town centre is also limited; the only gym operator within the town centre is Puregym. There is no cinema or any other notable commercial D2 uses.

4.17 The town centre does have a number of community and healthcare uses, these are generally in peripheral locations and range from religious based community halls to health centres and a Library. These uses (ground floor) are shown highlighted on the plan below.

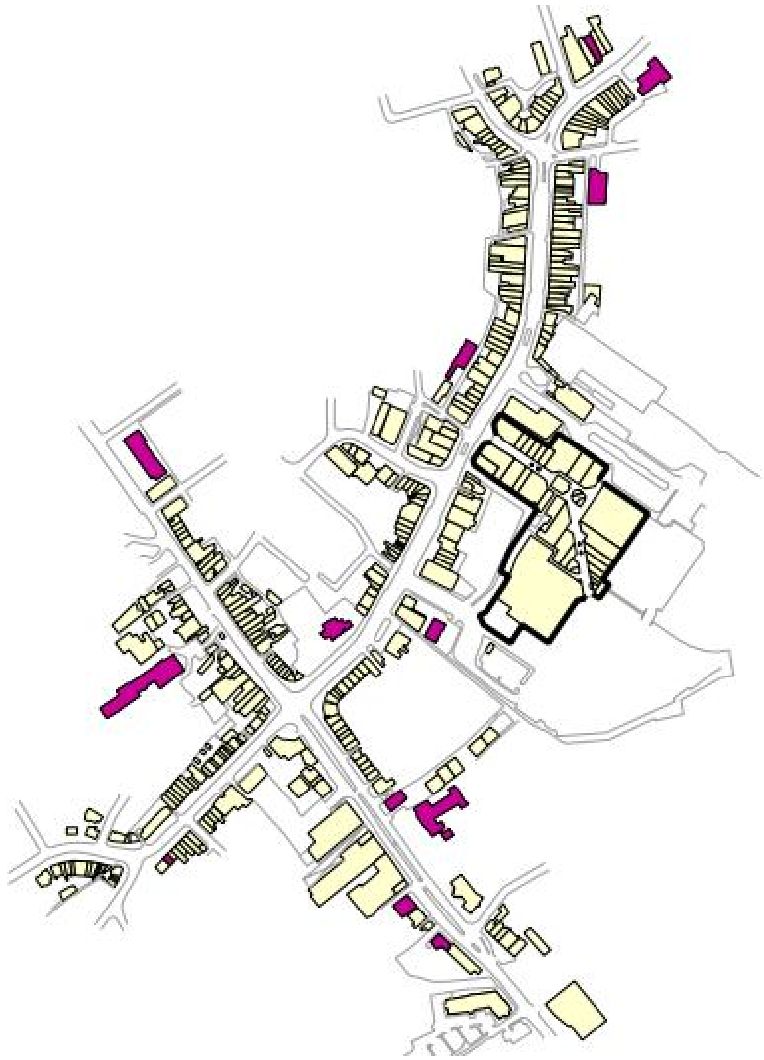


Fig 5. Edgware town centre Community and Healthcare use distribution (Edgware Goad Plan Feb 2019)

4.18 Based upon the Goad information, there are limited office premises within the town centre and we are aware that some offices have been subject to residential conversion. It should be noted that the Goad data does only cover ground floor space and we know from our research that there are office premises on the upper floors of buildings in the town centre. However, we are not aware of any co-worker or shared workspace type operations within the town centre.

4.19 The 2017 PBA work included a composition table that set out the number and percentage of the broad uses classes and compared the composition to national averages. This table is reproduced below.

Edgware town centre composition (PBA 2017)

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

4.20 Having reviewed the PBA table and considered the latest Goad Plan it is apparent that the PBA has mixed up convenience and comparison categories in the above table. We have not updated the analysis fully with the February 2019 data, but have reviewed vacancy levels that are set out below.

Vacancy Levels

4.21 The PBA work showed a vacancy of 16 units in 2017 that was the equivalent of 5.5% based upon total units.

4.22 In 2019, there were 32 vacant units within the town centre, equivalent to 9% of units. Whilst this vacancy rate is still below the prevailing national rate (circa 12%) it does show a potential weakening of the town centre and may be an indication that there is an oversupply of retail floorspace.

4.23 The plan below shows the distribution of vacant units around the town centre. There are no particular concentrations of vacant units around the town, the largest void is the former M&S unit within the Broadwalk Centre; we understand that TK Maxx are to occupy this unit.

Fig 6. Edgware town centre Vacant units at Feb 2019 (Edgware Goad Plan Feb 2019)

Gap Analysis

4.24 The preceding section that considered town centre composition has highlighted areas of deficiency in the town centres current offering, particularly given the status and function of Edgware. We consider these to be:

- Comparison Retail – particularly fashion and more aspirational brands;

- Food and Drink – casual and family dining, evening activity;
- Commercial Leisure – health and fitness, cinema, bowling; and
- Employment – B1 offices

4.25 The above list is in part supported by the findings of the PBA work that engaged with the public to establish what aspects of Edgware town centre they would like to see improved. A summary of the findings of this engagement is provided below.

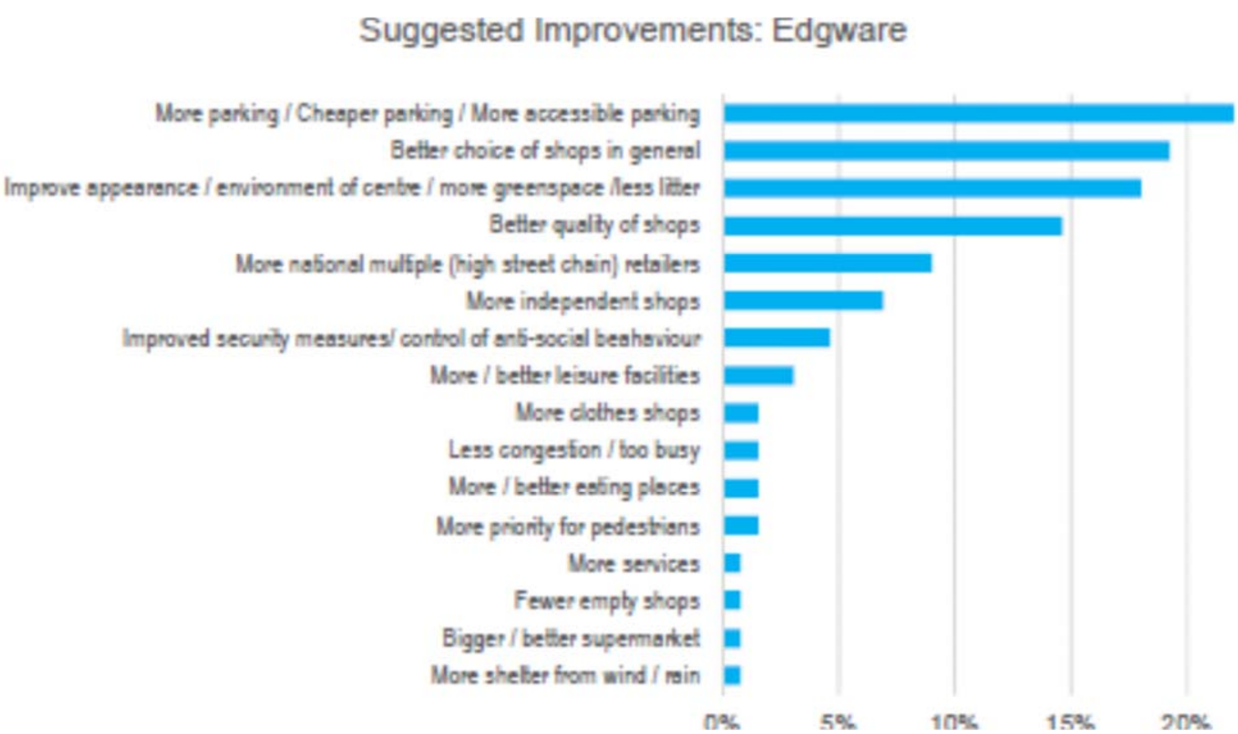


Fig 7. Edgware town centre suggested improvements (PBA 2017)

4.26 Of the suggested improvements that individually totalled above 5% of all responses, they primarily relate to retail quality and overall provision. In combination, these improvements (if summed) are around 47%.

4.27 Car parking is always an issue that is highlighted when the public are consulted and this is a difficult balance where policies on sustainability encourage alternative non-private car modes of travel and parking standards for new development are seeking to reduce parking levels.

4.28 Given the sites high public transport accessibility (PTAL rating of 6a and 6b) and the potential for even better integration of bus and Underground services to be achieved from the redevelopment. Shifting the emphasis from private car transport to public transport should be a priority in this location and a reduction in overall car parking levels of the site would be a measure that could promote such a shift, particularly for shopping trips within the local area and commuter parking given the planned interchange improvements.

4.29 Environmental quality is a valid improvement, whilst the town centre is relatively attractive and well maintained; there is no space available for open-air socialising or public events to be held within the town centre.

Summary

4.30 Edgware is in competition with a number of nearby centres which have stronger retail offerings and competition will increase with proposals for Brent Cross / Cricklewood being realised. It is therefore vital that Edgware continues to meet the current needs and future expectations needs of its support population. To respond to competition Edgware needs to have a strategy and find a niche or element of differentiation that will give the town centre a uniqueness that will attract visitors and ensure they continue to return.

4.31 The Council's town centre and retail evidence base work from 2017 found Edgware to be vital and viable. We would not disagree, but there is evidence of increasing vacancy levels and like other town centres, the structural change in retailing will continue to have an impact upon the function and health of the town centre. The recent grouping of many previously separate use classes into the new Class E may however make it easier for some of these currently vacant units to be re-occupied. This may be particularly the case in areas of what are currently primary frontage, where the focus has been on A1 uses.

4.32 By strengthening specific commercial aspects of the town centres composition (comparison retail, food and beverage, commercial leisure and employment uses), seeking opportunities for features which will attract and differentiate the town centre (such as cultural and art offerings) and providing environmental improvements including usable public spaces Edgware town centre should ensure its ongoing vitality and viability.

5. INDICATIVE COMPONENTS OF TOWN CENTRE REDEVELOPMENT SCHEME

Introduction

5.1 In this final section of the report, we draw together the analysis from preceding sections and identify the key components that should be taken forward in the sites redevelopment. These conclusions are based upon policy and background evidence; retail and town centre development trends; and assessment of the health, quantitative and qualitative functioning of Edgware and opportunities to bolster the functioning of the town centre.

5.2 The key commercial components and explanation of format and type are set out below.

5.3 **Comparison Retail** – any redevelopment of the Broadwalk Centre would need to re-provide floorspace with 25% of it proposed in the Local Plan to be for a mix of office, leisure, retail etc. use. However, given the changing retail environment particularly the cautiousness of national multiple retailers, it is very likely that whilst a similar quantum of floorspace is provided not all of this would be comparison goods retailing. The new development provides the opportunity to create a mix of retail; retail service; office; and food and beverage, which will be attractive both commercially to occupiers and to shoppers / consumers.

5.4 This approach / outcome is now more likely due to the recent changes to the UCO, where flexibility for floorspace to used by a wide variety of business types without planning restrictions means there is less of a need to set out a specific proportion or quantum of floorspace specifically for retail use.

5.5 Considering comparison retail offer specifically a letting strategy and active tenant management could be used to curate a tenant mix that includes fashion retail and more aspirational brands as retail anchors. A high quality development with a good mix of other uses will be attractive and generate footfall that are factors that these types of retailers consider key to trading location decisions and store viability.

5.6 **Convenience Retail** – the existing Sainsbury store is the main anchor to the Broadwalk and provides the town centres main food shopping opportunity. It is expected that this store is provided, but could potentially be in an alternative format with other uses provided above the store (residential/office) and car parking as basement/under croft where viable.

5.7 **Food and Beverage** – provided as a mix of formal units and more informal 'pop-up' food market spaces. The informal element could be themed to give some local distinctiveness picking up a transport theme and arranged around or within a space that can be used for events and markets. This will generate footfall daytime and evening to the benefit of the whole town.

5.8 **Commercial Leisure** – potential for a cinema that could be linked to the food and beverage offer, other potential uses could be a private gym, or some family entertainment centre type use. Hotel is another potential use, operators would consider the adjacency to the transport hub attractive for business and leisure stays.

5.9 **Employment** – both formal B1 office and shared workspace that would take advantage of the good transport links and use the other facilities within the town centre daytime and evening. These uses could be provided above ground level on top of retail or leisure components.

5.10 **Residential** – depending upon constraints and design likely to be apartment type development as a mix of private and affordable. Given transport links, this location would also be attractive to Build-to-Rent developers/investors. Other residential uses can also be explored, such as elderly persons' accommodation.

5.11 **Community, health, education use -** varied potential from the more commercial end of spectrum (crèche/nursey/dental practice etc.) through to public services such as one-stop hub for council services.

5.12 **Public transport interchange** – The need to fully integrate the underground and bus services in this location would enhance the attractiveness of the town centre, particularly by providing an improved arrival point into the town centre. Public transport (and a successful integration of different forms in this location) can help reinforce and support the high street by increasing footfall to and through the area, resulting in greater passing trade for businesses located in the area. The current transport hub of Edgware does not anchor the high street or give any benefit to it, and rectifying this is one of the key opportunities of remodelling the area.

5.13 In addition to the above, the enhancement of accessibility to and from Edgware town centre would also make residential development more attractive to prospective buyers, assisting in supporting the high street on an on-going basis, but also in enabling and brining forward a significant quantum of additional dwellings.

5.14 **Other** - To respond to competition Edgware needs to have a strategy and find a niche or element of differentiation that will give the town centre a uniqueness that will attract visitors and ensure they continue to return. An appropriate combination of the above can achieve this but other opportunities which can set the town centre apart from others should also be considered, such as cultural and art offerings.

5.15 **Sustainability –** sustainable streets and development can meet the various requirements of current and future residents by involving circular systems thinking to address the localisation of food resources, reuse of waste materials, water management and renewable energy.

5.16 **Flexible space and public realm** – built and outdoor, which can be used to provide location for events and markets. The importance of the spaces between buildings and the treatment of the open spaces should not be underestimated in creating usable and attractive places. This will be particularly relevant to how this development site is knitted into the wider town centre and to how town centres must adapt to climate change (i.e. through more shade). There are some existing areas to which this particularly applies, such as the High Street, where its repair, improvement and enhancement would be particularly beneficial to improving the areas identity and sense of place.

5.17 It is worth reiterating that Covid-19 is likely to have a noticeable effect on how places function but the magnitude of this and whether this will be on a shorter term of longer term is yet to be seen. This is something that will need to be closely monitored but it also reinforces the need for flexibility and adaptability of places to react to unforeseen circumstances.

5.18 At this preliminary stage, development viability has not been considered but based upon very initial market research residential and commercial values are reasonable to good in the area and revenue generating commercial and residential elements could potentially cross fund and support affordable housing, affordable workspace and any public service uses that may be provided. However, the build costs for dense multi-level development are high.

APPENDIX ONE – EXAMPLES OF RECENT TOWN CENTRE REGENERATION SCHEMES

Appendix 1:

Edgware Town Centre Regeneration – examples of other town centre redevelopments

Component Summary Table

	Edgware	Elephant & Castle	Addlestone One	Egham Gateway West	Crawley town centre	Bracknell town centre	Westgate, Dartford	Woking town centre	Barking town centre	Pop Brixton
Site area	8.2Ha	No overall figure specified	2.5Ha	0.94Ha	Multiple sites	Not specified	2.5Ha	Multiple sites	13.8Ha	0.3Ha
Residential – private	1,546 (65%)	0 (0%)	160 (75%)	67 (66%)	437 (80%)	N/A	Unspecified	N/A	Up to 855 new homes	N/A
Residential - social	833 (35% - based on AH requirement in draft Plan)	979 (100%)	53 (25%)	34 (34%)	109 (20%)	N/A	Unspecified	N/A	Up to 855 new homes	N/A
Residential – BTR	0 (0%)	0 (0%)	0 (0%)	3,225sqm student accommodation	0 (0%)	N/A	Unspecified	400+ units	Up to 855 new homes	N/A
B class employment		Around 175,000sqft (16,250sqm) of new leisure facilities, shops, cafes and restaurants	582sqm lost	76sqm	10,950sqm	N/A	N/A	N/A	Unspecified quantum for small and start-up businesses	N/A
Retail		Around 175,000sqft (16,250sqm) of new leisure facilities, shops, cafes and restaurants	6,996sqm retail uses (A1-A5) (net gain of 5,991sqm)	-1,066sqm net (A1-A5)	N/A	70 new retail and food and beverage outlets	Not specified	11,600sqm commercial space	Unspecified quantum	49 habitable containers (6 affordable) totalling 556sqm
Food & beverage		Around 175,000sqft (16,250sqm) of new leisure facilities, shops,	6,996sqm retail uses (A1-A5) (net gain of 5,991sqm)	-1,066sqm net (A1-A5)	N/A	70 new retail and food and beverage outlets	New bars and restaurants	11,600sqm commercial space	Unspecified quantum	49 habitable containers (6 affordable) totalling 556sqm

	Edgware	Elephant & Castle	Addlestone One	Egham Gateway West	Crawley town centre	Bracknell town centre	Westgate, Dartford	Woking town centre	Barking town centre	Pop Brixton
		cafes and restaurants								
Commercial leisure		1,000 seat multi-screen cinema	2,700sqm cinema	1,247sqm net gain.	N/A	12 screen cinema	Hotel and cinema	189-room Hilton Hotel	150 bed hotel, new music venue and cinema	N/A
Education		A new building for London College of Communication, University of the Arts London (UAL) and a centre for UAL's core university services	N/A	N/A	N/A	N/A	N/A	N/A	A three-form entry primary school	N/A
Community facilities		500-audience capacity grass-roots cultural venue	115sqm district heating facility	N/A	New public spaces / squares	New / redeveloped public spaces and squares	New public square as well as potential health and wellbeing provision	N/A	New healthcare facility	81sqm community space, 253sqm community space
Public transport	New and enhanced interchange between bus and underground systems.	New Northern Line entrance	N/A	N/A	Remodelled railway station	£6.5 million extra investment in the highway infrastructure	N/A	N/A		N/A
Car parking		N/A	445 spaces (227 additional)	34 additional spaces	Not specified	3,800 car spaces provided in new or upgraded car parks	Multi-storey car park	740 additional spaces		N/A

Elephant and Castle

http://elephantandcastletowncentre.co.uk/

979 new homes, on a site where none currently exist. 35% of these will be affordable, including 116 social rented homes managed by Southwark Council or another registered provider and be offered in priority to people living and working in Southwark. 16% will be in line with ‘London Living Rent’ (affordable housing for middle-income Londoners, eligible to household incomes of up to £60,000) and 49% Discounted Market Rent (homes with rent caps at 80% of market rent).

A new Northern Line entrance, escalators and ticket hall, with better accessibility and step-free access to Elephant and Castle mainline railway station

A new building for London College of Communication, University of the Arts London (UAL) and a centre for UAL’s core university services, ensuring the establishment can remain in the area. It will secure existing jobs in Elephant and Castle as well as relocating UAL staff to the area (circa 500 jobs), alongside a more permeable space for public exhibitions and events.

Around 175,000 sq ft (16,250sqm) of new leisure facilities, shops, cafes and restaurants including provision for a 1,000 seat multi-screen cinema and a 500-audience capacity grass-roots cultural venue.

Space for community leisure uses - a bingo operator has been offered first refusal on one of the leisure spaces (20,000sqft / 1,850sqm) in the proposed development on the west site (currently occupied by the university). There is also leisure space on the east site (currently occupied by the shopping centre) that could be used as a cinema

On-site affordable retail and workspace facilities (10%).

Significant job creation during the build, with 1,230 construction workers / year needed across the ten-year build time and almost 2,000 full time jobs being provided in the new town centre (an increase of 570).

2.5 acres (1ha) of high quality public realm including new safer pedestrian routes, railway arches and a public square

Addlestone One

https://www.runnymede.gov.uk/article/18949/AddlestoneOne

https://addlestoneone.co.uk/whats-here/

£80million town centre regeneration programme

213 new homes have been built (53 (25%) of which were affordable).

Construction work was completed in 2019 and the town centre is now home to Addlestone One, a mixed use development including retail units, restaurants, a supermarket, hotel and multi-storey car park. Among the businesses located in Addlestone One are:

- Nando's restaurant

- Smith and Western restaurant
- The Light cinema (2,700sqm)
- Boots the Opticians
- Holland and Barrett
- Waitrose
- Premier Inn (101 beds)

The Council is constantly working to bring new businesses into the development, which is less than a 10-minute walk from Addlestone train station.

As well as homes and businesses, the development also houses a joint civic centre for public services, housing Runnymede Police, Addlestone Library and Runnymede Borough Council.

Egham Gateway West

https://www.runnymede.gov.uk/article/18948/Egham-Gateway-West

Runnymede Council are investing in a multi-million pound upgrade to part of the town centre broadly bounded by Station Road North and parts of Church Road and High Street. The work is expected to take around two years, from December 2019 and the programme is currently known as Egham Gateway West.

The plans will deliver the following new accommodation:

- 27 affordable for rent homes
- 7 shared ownership homes,
- 67 market rate sale or rent apartments
- Student accommodation

This development will also see a new four screen Everyman cinema (1,247sqm) open on the corner of Station Road North and Church Road. There will also be retail and restaurant units, a food convenience store and a new public square as well as 3,225sqm of student accommodation.

Crawley town centre

https://www.pbctoday.co.uk/news/planning-construction-news/crawley-town-centre-regeneration/70026/

91 apartments set over nine storeys currently being completed on the site of a former two-storey car park next to the current Town Hall.

The project, which will be completed in December 2021, involves the demolition of the existing Town Hall and the construction of a nine-storey building that will house the 41,000 sq. ft. (3,800sqm) Town Hall as well as 77,000 sq. ft. (7,150sqm) of commercial office space.

Once the new building is open, the remainder of the current Town Hall will be demolished to make way for the final phase of redevelopment, a 10-storey block featuring 182 apartments with ground floor commercial space opening on to a new public square.

Once complete, alongside the new Town Hall and commercial units will be 273 new apartments, including 109 affordable homes and a new public square with public artwork.

Bracknell town centre

Phase 2 (phase 1 was completed in 2011)

This completed on 7 September 2017, when the £240 million The Lexicon opened. The development included:

- 70 new retail and food and beverage outlets, including two 80,000 sq ft (7,430sqm) store housing a 3-storey Fenwick department store and Marks and Spencer, and a 12 screen cinema
- 3,800 car spaces were provided in new or upgraded car parks
- 8 core buildings and 6 place making squares for events and activities
- £6.5 million extra investment in the highway infrastructure from Bracknell Forest Council

Phase 3

As part of the next phase, the council is reviewing plans for the civic quarter, Market Square and the southern gateway. In addition, work is continuing to develop Princess Square and the area around the old Bentalls store, called The Deck which will involve a £30 million refurbishment.

Westgate Dartford

http://westgatedartford.com/

The £75 million regeneration is being promoted by Muse Developments, Dartford Borough Council and Homes England.

The 2.5-hectare Westgate site is in the heart of Dartford town centre. It has the potential to establish a new cultural quarter, enhance the town's leisure and hospitality offer and bring vibrancy to the whole community.

It is proposed to include:

- Cinema
- New bars and restaurants
- High-quality homes
- Hotel
- Multi-storey car park
- A new public square

- Potential health and wellbeing provision

Woking town centre

https://www.woking.gov.uk/major-developments/victoria-square-development

The Victoria Square development in Woking town centre is on track for phased completion in 2020.

Construction giant Sir Robert McAlpine is spearheading the multi-million-pound transformation, which is a joint venture between Woking Borough Council and shopping centre owner and investor, Moyallen Group.

At 34 and 32 storeys high, the two residential towers will feature over 400 high specification apartments in a prime location. The built-to-rent apartments will benefit from full concierge facilities, an external garden, and an amenity space for residents.

The 23 storey third tower will be home to the town's newest hotel. The 189-room flagship Hilton Hotel will include senior and junior suites, a new lobby bar, all-day dining restaurant, sky bar, conference facilities and an on-site café.

The new development will be anchored by 125,000 sq ft (11,600sqm) of commercial space featuring the new Marks & Spencer food and clothing store across 50,000 sq ft (4,650sqm), multi-storey car park, a medical centre and two public plazas.

In addition to the new car park, sited under the M&S and retail units, the project has also incorporated the demolition and redevelopment of the Shoppers' Red car park. When combined, the rebuilt 1,382 space Shoppers' Red car park and the new M&S car park, will provide an additional 740 car parking spaces for Woking town centre.

Barking town centre

https://www.barkinganddagenhampost.co.uk/news/business/developers-reveal-vision-for-vicarage-field-transformation-1-6173691

The plans, by developers Benson Elliott, will see the 138,000sqm site transformed, with flats built on top of a new-look shopping centre.

When complete, it could boast up to 855 new homes, ranging from studio apartments to three bedroom flats

The tower blocks will vary in height with the tallest building set to be 138m tall. Alongside the homes, there is also the intention to build a 150-room hotel at the centre of the development, overlooking the main public space.

A three-form entry primary school - complete with rooftop playground - is set to be built, while there is also the intention for a new healthcare centre on the corner of Vicarage Drive and Ripple Road.

Plans also include retail and restaurant space, a multi-screen cinema and a new music venue, as well as space for small and start-up businesses.

Food and Drink Focused Developments

Pop Brixton: https://www.lambeth.gov.uk/sites/default/files/Pop-Brixton-Evaluation-18.0104.pdf

Opened in May 2015, its contains 938sqm of space on a 0.3Ha site vacant site which is due to be redeveloped in the longer term. It allows for the flexible uses of 49 shipping container units (six of which were affordable at a 50% discount). It contained a mix of food outlets, community space, offices and open and performance space. It also contained Pop Farm, an urban farm offering local people the opportunity to participate in a range of free gardening activities.

Average occupancy at Pop since it became fully operational has been around 91%. During the planning and delivery process, the capital cost of the delivery of Pop Brixton rose from an anticipated £550,000 to around £1.6m.

Vinegar Yard: https://www.vinegaryard.london/gallery

Sitting exactly halfway between Borough Market and Maltby Street Market, this former car park is due to be totally redeveloped over the coming years. Vinegar Yard is an urban garden open seven days a week, with food stalls (including Indian-inspired burgers from Baba G's), vintage clothing and antiques traders, and a bar pulling local beers.

Flat Iron Square: https://www.flatironsquare.co.uk/

Flat Iron Square is a hub for drinking, dining and dancing in the shadow of The Shard. The outdoor space is host to a flea market at weekends and various events throughout the year, as well as home to a winter ski chalet, Apres. Under the arches you'll find street food stalls spanning world cuisines, while next door is live music venue Omeara, its sister tequila bar Cantina and slightly-hidden-away wine bar Tap & Bottle.

Buck Street Market: https://buckstreet.market/

The revamped Buck Street Market is Camden's answer to Boxpark and Pop Brixton – a multi-purpose 'village' space spread on three levels and built from 52 repurposed shipping containers, many of which will house booze and street-food vendors (including some Camden Market regulars). The whole complex will also boast a rooftop garden and terrace for eating alfresco.

Bang Bang Oriental: https://www.bangbangoriental.com/

A pan-Asian food court in Colindale. This is the largest food hall of its kind in Europe, with 27 individual kiosks offering a whole range of oriental cuisines and seating for up to 450 people. The space also hosts Chinese beauty parlours, a community dance rehearsal studio and the 300-cover flagship Golden Dragon restaurant.

Deptford Market Yard: https://www.deptfordmarketyard.com/

Located in a complex of arches in downtown Deptford, the Market Yard is a hip hub of indie shops, bars and on-trend street food eateries. In Deptford Market Yard you'll find 14 arches, 7 shops above the carriage ramp, 2 restaurants and a new market space, all filled with local, independent businesses, creative spaces and places to eat & drink.

Dinerama: https://www.streetfeast.com/market/dinerama

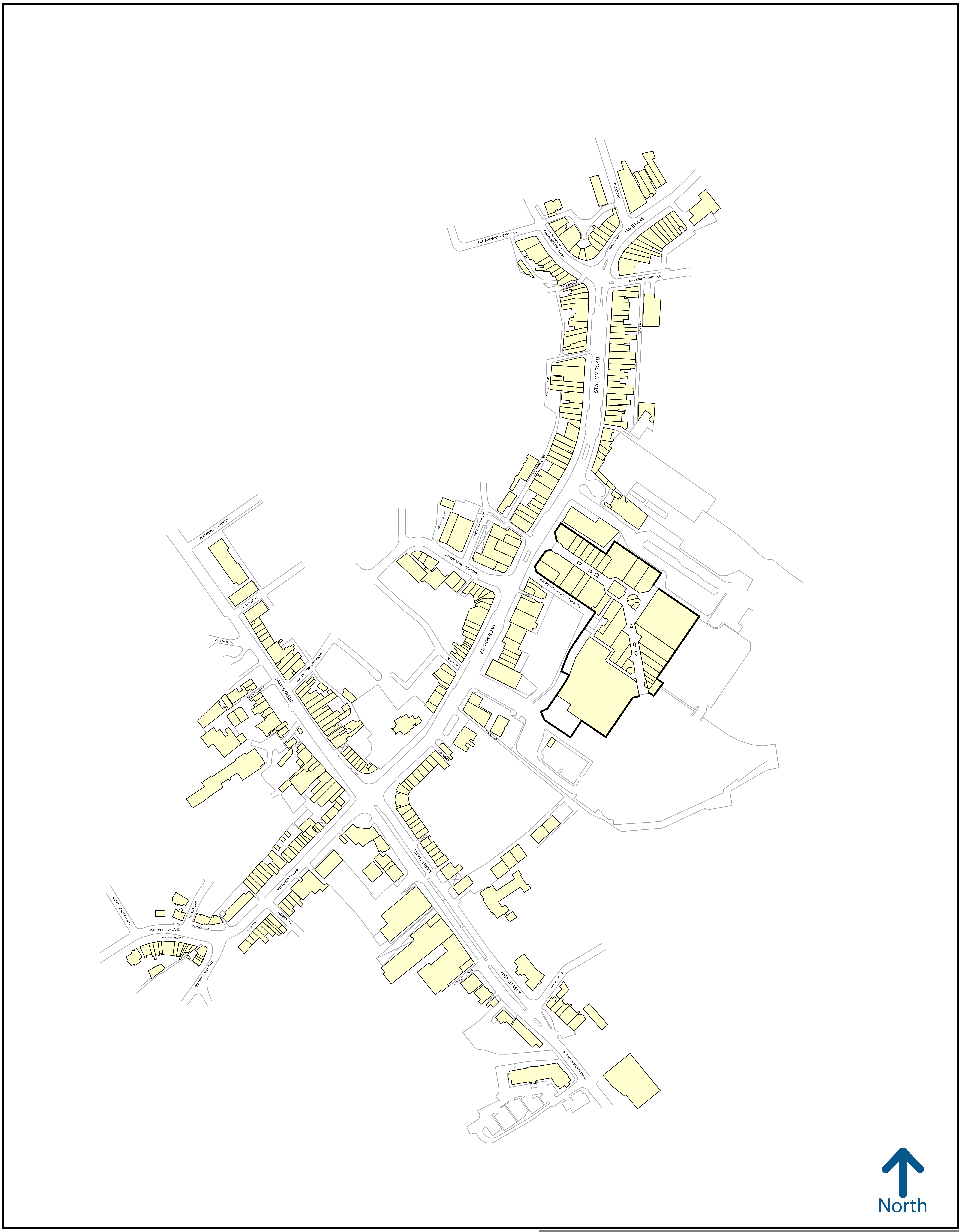
Street Feast’s Shoreditch base is a taste making street food hub and is housed in a former bullion truck depot. There are ten bars across two levels at the street food arena in the heart of Shoreditch, now winter-proofed with roaring fires and complete cover.

The Kitchens at Old Spitalfields Market: https://oldspitalfieldsmarket.com/journal/the-kitchens

The Kitchens in Spitalfields is as a street food market and restaurant hybrid made up of ten units.

APPENDIX TWO – EDGWARE GOAD PLAN

Edgware



125 metres

Experian Goad Plan Created: 15/05/2020
Created By: Boyer Planning Limited

Edgware

50 metres

Experian Goad Plan Created: 15/05/2020
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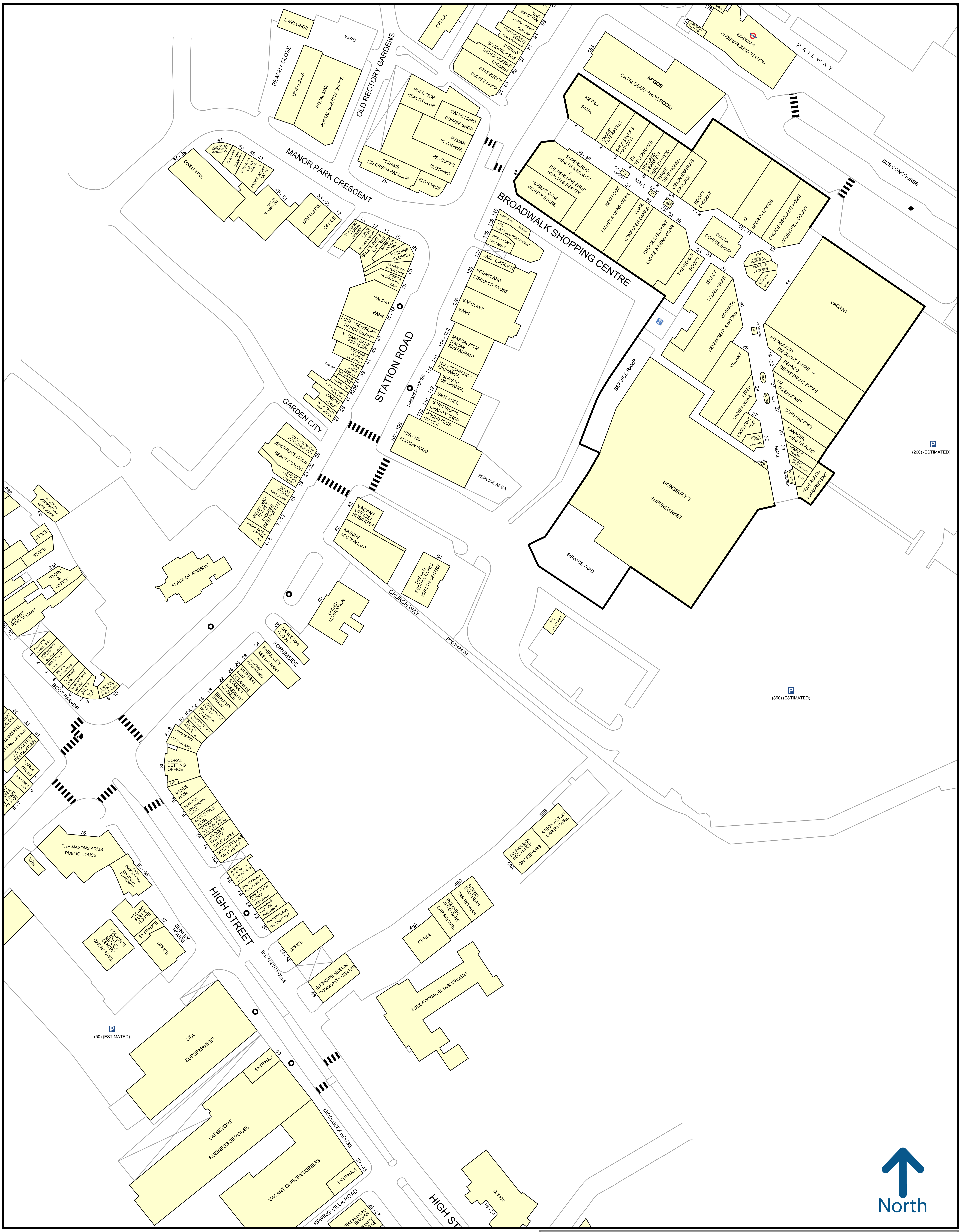
Edgware



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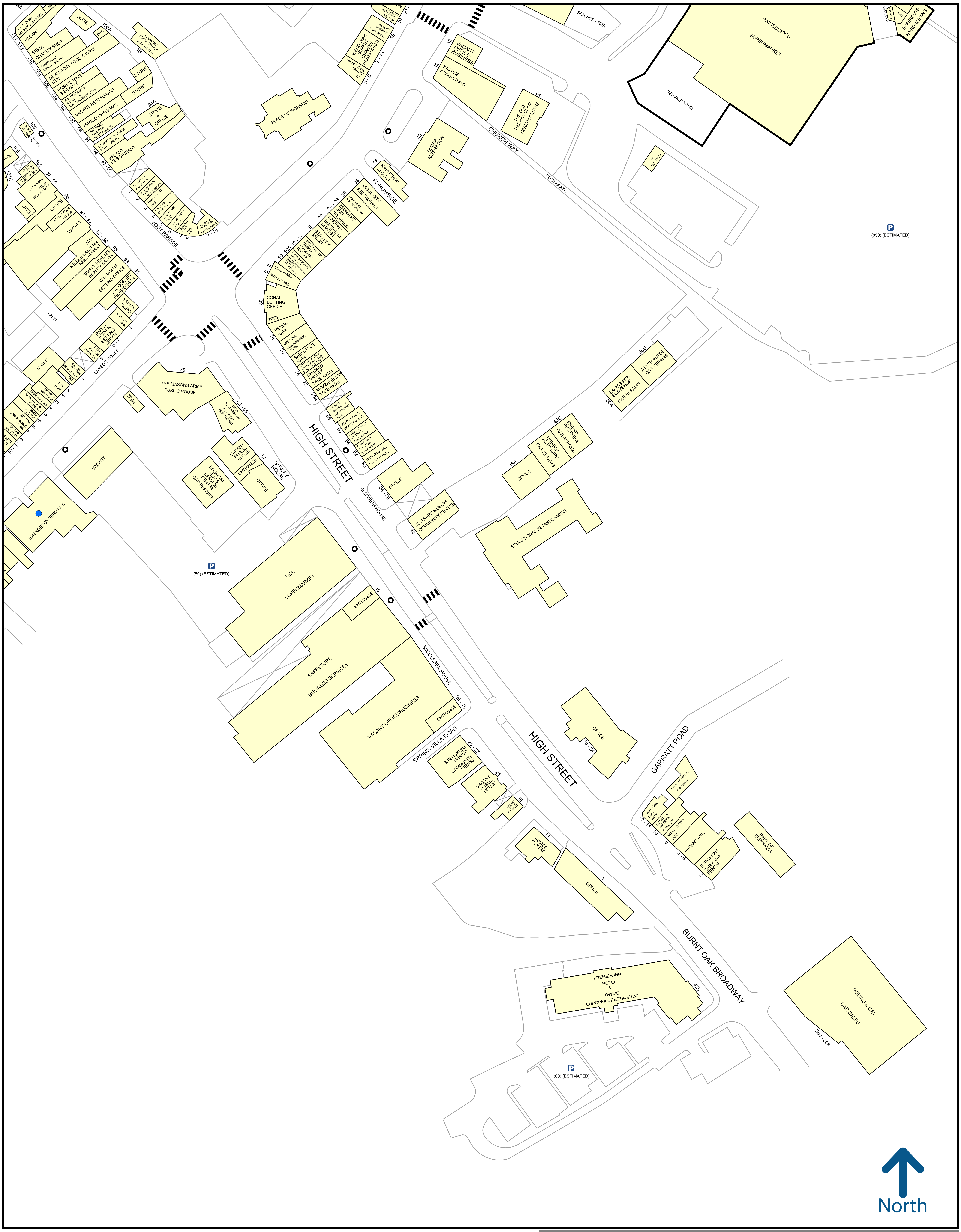
Edgware



50 metres

Experian Goad Plan Created: 15/05/2020
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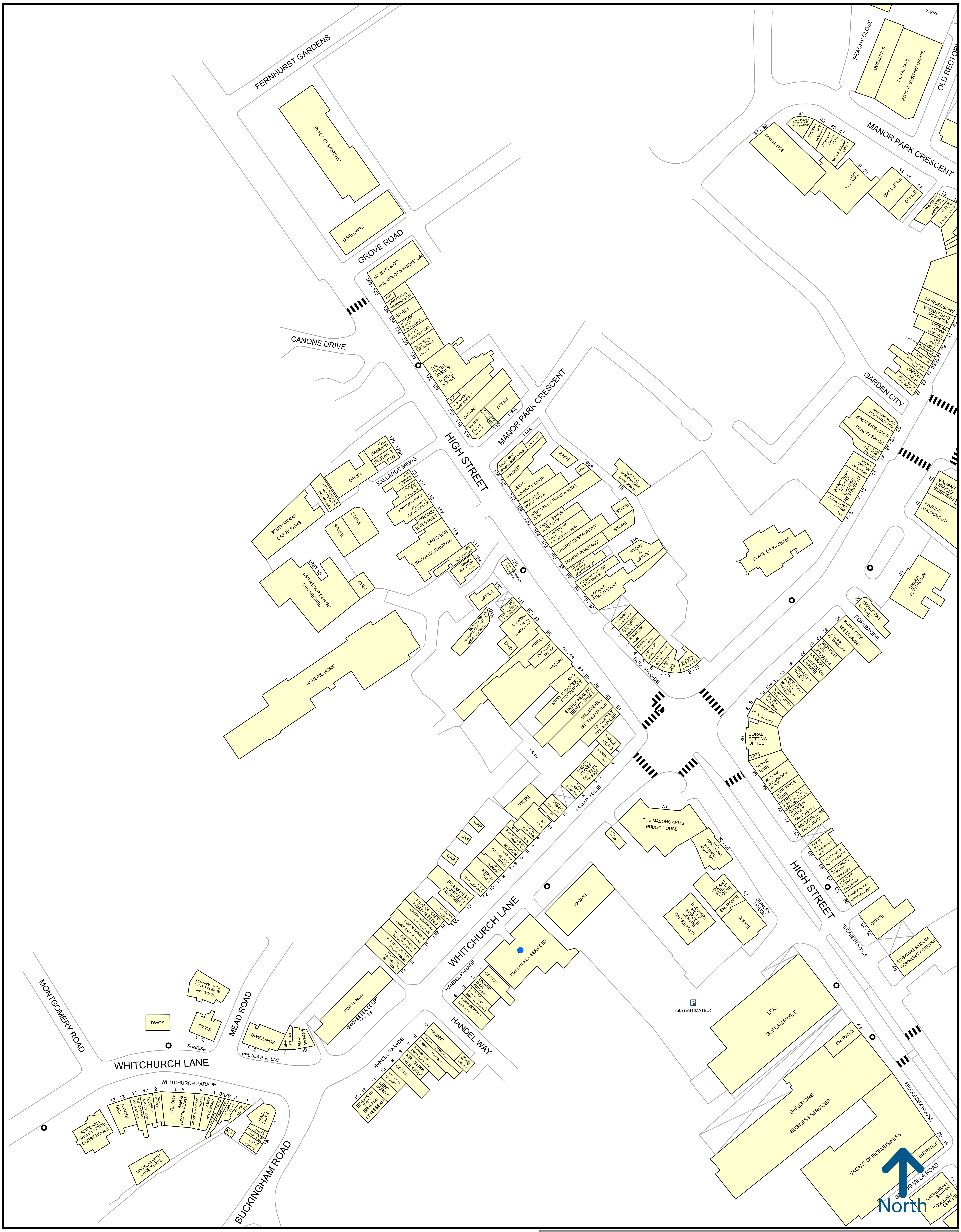
Edgware



50 metres

Experian Goad Plan Created: 15/05/2020
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