Haringey Retail and Town Centre Uses Study
Final Report

London Borough of Haringey

14 December 2021

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Glossary

Benchmark turnover

Expected turnover of existing retail floorspace based on national averages which the identified available expenditure can be measured against.

Class A1

Commercial units/premises previously classed as retail or shop uses in the old Use Classes Order (UCO), which are now class E(a) in the new UCO (post September 2020).

Class A2

Commercial units/premises previously classed as financial or professional services, for example banks and building societies within the old UCO, which are now class E (c) in the new UCO.

Class A3

Commercial units/premises previously classed as restaurants and café food outlets in the old UCO, which are now class E (b) in the new UCO.

Class A4

Commercial units/premises previously classed as public houses or bars in the old UCO, which are now Sui Generis (unclassified) in the new UCO.

Class A5

Commercial units previously classed fast as food or takeaway food outlets selling cooked hot food within the old UCO, which are now Sui Generis (unclassified) in the new UCO.

Class E

Units/premises currently classed as commercial, business and services in the new UCO), including shops, restaurants/cafés, financial/professional services, indoor sports/fitness, medical health facilities, creche/nurseries and office/business uses.

Convenience goods

Consumer goods purchased on a regular basis such as food/groceries and cleaning materials.

Comparison goods

Durable goods such as clothing, household goods, furniture, DIY and electrical goods.

Experian

A data consultancy widely used for retail and leisure planning information.

Food and Beverage

Previous uses classes A3, A4 and A5 food and drink outlets, selling food and drinks consumed away from the home or hot food takeaway food but not food and grocery items including convenience goods.

GlobalData

A market research and data consultancy widely used for retail planning information, previously Verdict Research.

Goad Plans

Town centre plans prepared by Experian, which are based on occupier surveys of over 1,300 town centres across the UK.

Gross floorspace

Total external floorspace including exterior walls.

Local Data Company

A data consultancy specialising in town centre land use surveys and analysis.

Market share/Penetration rate

The proportion of total consumer expenditure within a given area taken by a particular town centre, destination or shopping/leisure facility.

Multi-channel shopping

Products made available to consumers on more than one sales channel, such as ecommerce websites, brick-and-mortar stores, marketplaces, comparison shopping engines, social media platforms, and other online channels.

Multiplex cinema

A cinema complex with five or more screens.

Net (sales) floorspace

Retail floorspace devoted to the sale of goods, excluding backstage/storage space and other areas not accessible to customers.

Oxford Retail Consultants (ORC)

A data consultancy widely used for retail planning information.

Special forms of trading

Retail sales via the internet, mail order, stalls and markets, door-to-door and telephone sales, including on-line sales by supermarkets, department stores and catalogue companies.

1.0 Introduction

1.1 The London Borough of Haringey (LBH) commissioned Lichfields to prepare a Retail and Town Centre Uses Study (RTCUS) for the Borough, including the main centres of Wood Green, Bruce Grove/Tottenham High Road, Crouch End, Green Lanes, Muswell Hill and West Green Road/Seven Sisters. This study is part of a suite of evidence base studies that will inform future planning policy. This RTCUS informs policy relating to town centre, retail and leisure matters in the Borough, together with a wider strategy for the future of the Borough's centres likely to be up to 2038. It will form part of the Council's evidence base in progressing the new Local Plan.

1.2 A separate Employment Land Study has been commissioned by the Council, prepared by Stantec. This study assesses the need for office and other employment space within the Borough. The Council's Good Economy Recovery Plan was published in March 2020. This plan seeks to support businesses and residents during the recovery period after the Covid crisis.

1.3 **Aims and objectives of the Study**

1.4 The key objectives of the study as set out in the Study Brief are as follows.

1 Identify the quantum and phasing of types of main town centre uses needed in Haringey's town centres including retail and leisure, as well as office and workspace demand (falling within the E Use Class) established form the Haringey Employment Land Study, to support the changing needs and lifestyles of the existing and new population.

2 Advise on realistic role, function and hierarchy of the Borough's centres over the plan period.

3 Carry out health checks for these town centres.

4 Advise on the most appropriate mix of uses to enhance town centres' overall vitality and viability.

5 Recommend the potential future planning designation of the Borough's existing centres.

6 Form evidence to support the New Local Plan policies developed by the Council.

1.5 In order to address these objectives, the report:

1 provides an overview of the latest national planning policy position, including the national and economic trends, and their implications for LBH;

2 assesses the short, medium and long term need and capacity for all main town centre uses over the plan period, over 5-year intervals. This assessment will use robust expenditure data, population growth estimates;

3 assesses changes in circumstances and shopping/leisure patterns (through a new post Covid restrictions household survey), not least the continuing difficult market conditions, Brexit uncertainties and the increase in online shopping;

4 assesses the current and emerging state of the retail, leisure and entertainment markets, including current and emerging trends, and set out the implications of these;

5 updates the needs assessment for the main commercial leisure uses i.e. cinemas, casinos, bingo halls, bowling, theatres, health & fitness and other cultural/tourism development;

6 assesses the role, strengths and weaknesses of main centres and the hierarchy at a more local level;

7 identifies the continuing role of smaller local centres and parades and identify areas of deficiency;

8 advises on the appropriateness of existing plan policy, specifically commenting on the approach to main town centre uses and the designation of centre boundaries, protected frontages etc. This will also include a review of impact thresholds and advice on the application of the sequential approach;

9 assesses options on how any identified need can be accommodated by pipeline developments, reoccupation of vacant space and the need for further allocations (if necessary); and

10 where there is a surplus of commercial floorspace, a strategy for repurposing retail premises may be required in some centres.

1.6 The findings of these elements of work have been drawn together to provide recommendations and conclusions, including a strategy for monitoring by LBH.

1.7 **Report structure**

1.8 Section 2 of this report provides an overview of trends and recent changes that will affect the demand for main town centre uses. The appropriate policy and strategy approach for the Borough should reflect these underlying trends.

1.9 Section 3 examines the existing hierarchy of centres within Haringey and surrounding boroughs. Appendix 5 provides more detailed centre health checks for the six main centres in Haringey i.e. Wood Green Metropolitan centre and the five District centres at Bruce Grove/Tottenham High Road, Crouch End, Green Lanes, Muswell Hill and West Green Road/Seven Sisters. Appendix 6 provides an analysis of local centres distributed throughout the Borough.

1.10 Section 4 sets out an update of the retail and food/beverage floorspace capacity assessment based on the latest available population and expenditure projections.

1.11 Section 5 updates the assessment of other main town centre uses including the scope for leisure, entertainment and cultural uses.

1.12 Section 6 reviews potential policy options for future development plan policy taking account of updated floorspace capacity projections and recent changes to the Use Classes Order (UCO) and permitted development rights (PDR).

1.13 Section 7 summarises the main conclusions and recommendations.

2.0 Recent trends and key changes

Implications of Brexit, Covid-19 and other trends

2.1 Historic trends indicate that consumer expenditure has grown consistently in real terms, generally following a cyclical growth trend. This growth fuelled demand for new retail floorspace. Since the last recession expenditure growth has been much slower and the demand for retail floorspace has reduced.

2.2 Experian is a data provider most often used for development plan evidence base studies. Experian provides consumer expenditure and other economic forecasts. Experian's latest (October 2020) forecasts suggest slower expenditure growth for the foreseeable future. Home shopping/internet spending is expected to grow at a much faster rate than traditional bricks and mortar shopping. Experian's short-term expenditure growth projections (2020 and 2021) for retail and leisure (published in October 2020) now reflect Brexit and the Covid-19 pandemic. The main implications of Brexit and the Covid-19 crisis for the evidence base are likely to be as follows:

- impact on the reliability of demographic and economic projections i.e. population growth and Experian expenditure forecasts;
- short term impacts on the mix of uses and customer behaviour that are likely to distort the base year position; and
- longer terms structural impacts that could affect the nature of town centres and the way consumers shop, eat/drink out and participate in leisure activities.

2.3 The key uncertainties relating to the first two points are primarily the length of Covid-19 crisis and likely recovery period. The longer term structural implications are harder to predict and quantify at this stage, but recent data provides a good early indication.

2.4 In the short term, operators have faced elevated risks to cash flow and increased costs arising from a slump in consumer demand and disruption to supply chains. Non-essential products, hospitality and leisure services have been hardest hit during the Covid-19 crisis. Short term supply chain disruption could lead to inflationary pressure, which may have an impact of consumer demand. Retailers with infrastructure to fulfil on-line orders/home delivery are benefiting at least in the short term. There is likely to be an accelerated structural shift to multi-channel shopping (home, TV and internet shopping), reducing the demand for physical space within town centres due the impact of the pandemic. This structural shift was already gathering pace before the pandemic.

2.5 Bearing these trends in mind, following the Covid-19 crisis there is likely to be a spike in town centre vacancies with unfortunately some businesses failing to re-open, particularly non-food retail operators, restaurants and leisure uses. However, the likely increase is uncertain at this stage. Many national operators have already announced job losses and store closures e.g. most recently Gap.

2.6 The Covid-19 crisis and Brexit could have some short-term impact in terms of population migration levels and construction activity. Given that the focus of this study is to assess the long-term need over the new local plan period with interval projections (i.e. 2021 base year to 2023, 2028 to 2033, and 2033 to 2038), development plan policy should assume population projections will return to projected levels by 2023. The first interval population projections at 2023, and certainly later years, should not be significantly affected by the Covid-19 crisis.

2.7 Office of National Statistics (ONS) monthly sales volume information for Great Britain indicated total retail sales volumes (including on-line sales) during the first Covid-19 lockdown were over

22% lower in April 2020 compared with the pre-Covid position in February 2020 (seasonally adjusted). However, the period between lockdowns (July and August 2020) sales volumes had recovered to pre-Covid levels. By October 2020 retail sales were 7% higher than the pre-Covid figure in February 2020. However, the reintroduction of Covid-19 restrictions saw a reduction in sales in between November 2020 to January 2021, reaching 5% below pre-Covid levels. Since January 2021, sales have recovered to 9% above pre-Covid levels in May 2021.

2.8 The comparison goods (non-food) sector was particularly affected with a 50% drop in sales from February to April 2020, whilst the food sector experienced 10% growth in sales during March 2020 in part due to panic buying at the start of the crisis. Food sales volumes were consistently higher than the February level during March to November 2020.

2.9 ONS data suggested on-line retail sales (seasonally adjusted) peaked at over 73% higher in May 2020 compared with February 2020. Figures for June 2020 to May 2021 have been consistently higher than the pre-Covid sales in February 2020, with a second peak of nearly 81% higher than pre-Covid levels in February 2021.

2.10 Food store on-line sales doubled during May and June 2020 but still represent a relatively small proportion of total sales in this sector, reaching about 11.9% in January 2021, reducing slightly to 10.9% in May 2021. For the non-food sector on-line sales as a percentage of total sales nearly trebled between February and April 2020, reaching 45% of sales. The recent figures for May 2021 suggest on-line sales in this sector remain at around 25%, compared with the pre-Covid level of 16.1% in February 2020.

2.11 These Covid-19 affected trends are likely to continue until all restrictions are removed. It is difficult to predict the longer term implications for retail sales and the amount of on-line sales. Nevertheless, ONS's post first lockdown data suggests retail sales should recover to previous levels of growth but the proportion of retail sales spent on-line is likely to represent are higher proportion of total sales, which will have an impact on the demand for traditional bricks and mortar retailing. Reflecting these trends, Experian's latest projections recommend relatively modest levels of growth when compared with historic trends and higher growth in on-line sales.

2.12 These on-line shopping national trends have been reflected in Haringey. The household survey results undertaken in July 2021 suggest over 32% of respondents do most of their non-food shopping on-line. On average each household undertook on-line shopping 0.59 times per week before the Covid-19 crisis. This propensity to shop on-line increased to 0.97 times a week respectively during the first Covid-19 lockdown.

2.13 When asked about on-line shopping in the future, the average expected propensity to shopping on-line is 0.82 times per week, marginally lower than levels during the Covid lockdown (0.97 time per week) but higher than pre-Covid levels (0.59 per week). These survey results suggest it is too early to plan for a significant shift towards on-line shopping, over and above the levels of growth already predicted by Experian, but a higher shift to on-line shopping is possible.

Long-term expenditure trends

2.14 Planning based on long terms expenditure growth projections has always had inherent uncertainties. Despite these uncertainties, development plans must assume a return to reasonable rates of growth and relative normality, although the implications of the short-term impacts should not be ignored. It is better to plan for a return to growth and then modify the strategy later if levels of growth are lower than originally predicted, rather than not planning for growth because there are significant uncertainties. The latter approach is likely to fail to respond in time if higher levels of growth are achieved, and any growth will go elsewhere. Nevertheless, a

cautious approach to expenditure growth, as now suggested by Experian, should be adopted bearing in mind the uncertainties relating to the growth in on-line shopping.

2.15 For convenience goods, Experian's latest forecasts (October 2020) anticipate limited growth (0.1% per annum after 2026). Experian expects slow growth in the future, but most of the growth will relate to non-store sales. Any need for new convenience goods retail floorspace in Haringey is likely to relate to population growth or qualitative areas of deficiency.

2.16 For comparison goods, higher levels of growth are expected in the future (between 2.9% to 3% per annum), still at a lower rate than previous pre-recession trends (8% per annum between 1997 and 2007). Historically comparison goods expenditure has grown significantly more than convenience goods expenditure, and Experian's latest national growth rate recommendations are consistent with these past trends.

2.17 New forms of retailing (multi-channel and home shopping) have and will continue to grow. These are referred to as special forms of trading (SFT) which includes sales via the internet, mail order, stalls and markets.

2.18 Home/electronic shopping and home delivery included in SFT has increased with the growth in the use of personal computers, smart phones and the internet. Click and collect / click and return shopping has become more popular. Recent trends suggest continued strong growth in multi-channel activity. Experian's Retail Planner Briefing Note 18 (October 2020) states:

"After easing in 2021, we expect the SFT (special forms of trading) market share to continue to grow strongly in the mid-term, hitting around 30% in 2027. The pace of e-commerce is anticipated to moderate over the longer term, reaching 35% of total retail sales by 2040."

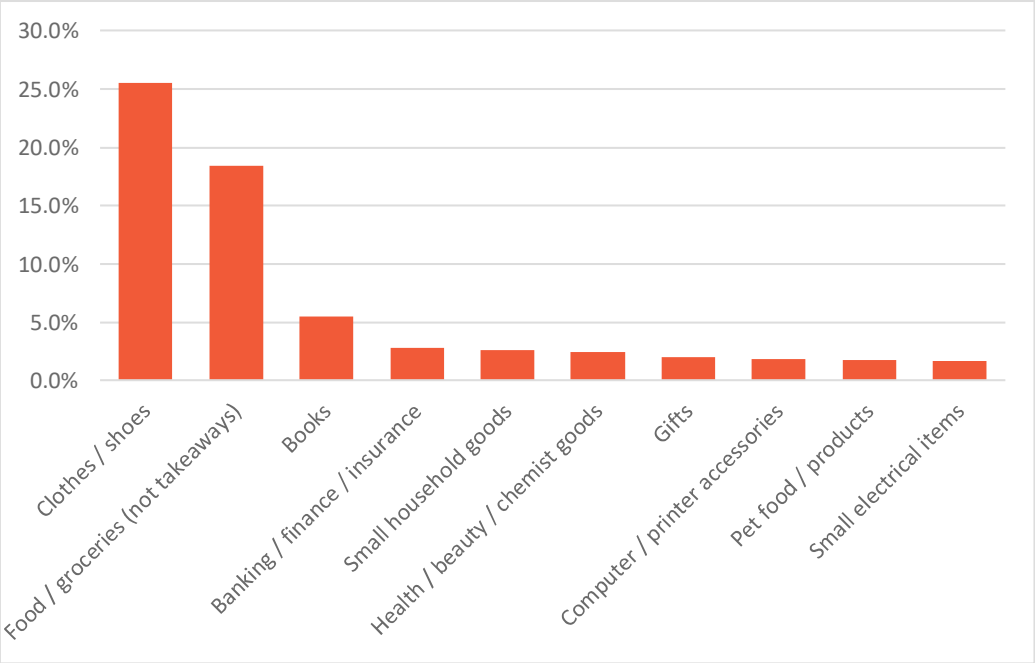
2.19 The floorspace capacity assessment in this study makes an allowance for future growth in e-tailing based on Experian projections. Given the likelihood that multi-channel expenditure will continue to grow at a faster pace than other consumer expenditure, the need assessment adopts relatively cautious growth projections for expenditure and an allowance is made for operators to increase their turnover/sales density, due to growth in home shopping and click and collect.

2.20 The household survey results indicate many households regularly buy items from the internet for home delivery. As indicated above, over 32% of respondents do most of their non-food shopping on-line. The main products regularly purchased online are shown in Figure 2.1.

2.21 These results indicate that a wide range of goods are purchased via the internet for delivery. However, clothing/shoes and food/grocery shopping are the items most often purchased online.

2.22 The household survey results indicate that 16.3% of households did their last main food and grocery shop via the internet/delivery.

Figure 2.1 Items/services regularly purchased online for delivery (% of respondents)



Source: NEMS household telephone survey results July 2021

Mode of travel

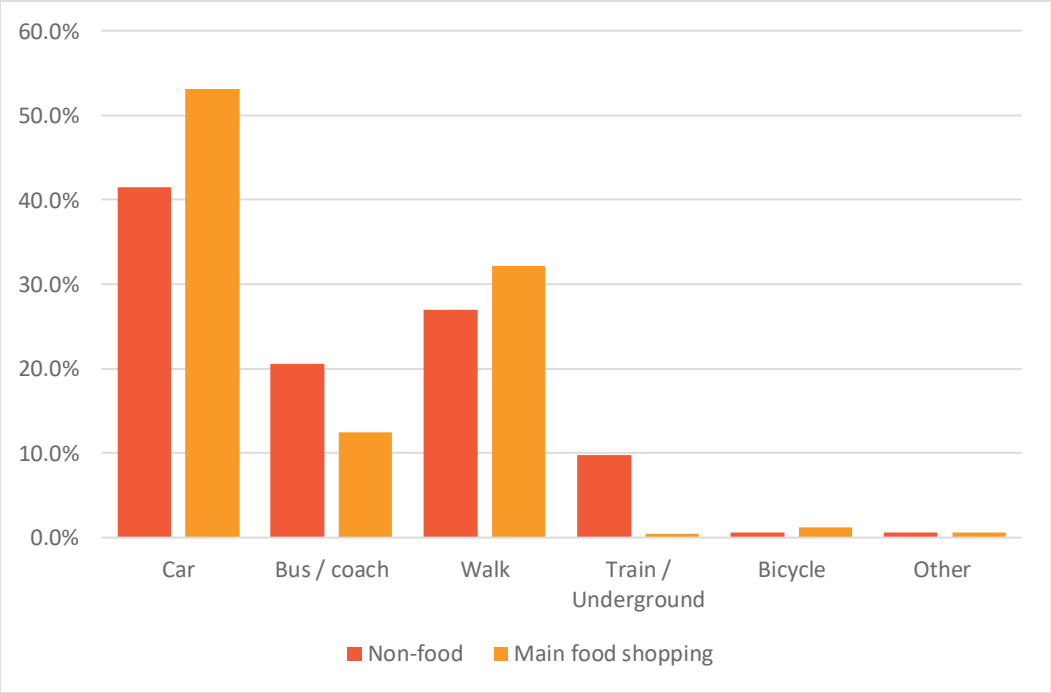
2.23 As indicated above, 32% of respondents do most of their non-food shopping on-line and 16.3% did their last main food and grocery shop via the internet/delivery. Experian suggests over 25% of retail sales is via non-store activity. These figures suggest many households do not need to travel to undertake food and non-food shopping.

2.24 Despite the increasing proportion of households shopping via the internet, the majority continue to travel to shopping destinations by car. The results for food and non-food shopping (excluding internet/home shopping) are shown in Figure 2.2.

2.25 Shopping by car (driver or passenger) is the most popular mode of travel for both non-food and main food shopping trips but relatively high proportions of customers use public transport or walk to shop for both food and non-food shopping.

2.26 Car travel for non-food shopping was highest (over 49%) in the north east of the Borough Zone 3 and lowest in the south west (Zone 2). Car usage for shopping was generally higher in the east side of the Borough. This variation may be due to car borne shopping trips made to Tottenham Hale Retail Park in the east of the Borough. For food and grocery shopping car usage varied less between zones.

Figure 2.2 Mode of travel for non-food and main food shopping (% of travelling household respondents)



Source: NEMS household telephone survey results July 2021

2.27 Based on Lichfields' recent experience, car usage is high outside of the major cities across the country i.e. normally over 80% of households for main weekly shopping. Within London car usage is generally much lower. A comparison with similar household surveys in selected parts of London suggest the following levels are car travel for shopping:

- Haringey - main food (53%) and non-food (42%)
- Barking and Dagenham - main food (65%) and non-food (56%)
- Enfield - main food (64%) and non-food (48%)
- Southwark - main food (48%) and non-food (32%)
- Wandsworth - main food (44%) and non-food (31%)

2.28 These results suggest car usage for both main food and non-food shopping in Haringey is broadly similar when compared with other London Boroughs.

2.29 Car usage is generally higher for main food shopping than for non-food shopping because many households undertake bulk food and grocery shopping once a week or less often. Bus and train/underground usages is slightly higher for non-food shopping, which may reflect more non-food shopping trips made to destinations outside the Borough e.g. Central London.

Demand for town centre floorspace

2.30 Lower expenditure growth and deflationary pressures (i.e. price cutting) in the non-food sector have had an impact on the high street in the past decades. Because of these trends, the UK average shop vacancy rate (based on Goad Plan data) increased from around 10% in 2005 to about 14% in 2012. Vacancy rates gradually improved to 11.8% in 2018 but have now increased to 12.4% in 2020. It seems likely there will be a sharp increase in shop vacancies in many town

centres, as and when the impacts of the Covid-19 pandemic and recession are fully felt over the next 18 months.

2.31 The number of vacant shop units within Haringey's six main centres was 131 in 2020. The average shop vacancy rate in these centres was 9.1%, lower than the UK pre-Covid-19 average (12.4%).

2.32 The national decline in the number of comparison goods retail outlets within town centres has been evident in Haringey's main centres. The Local Data Company's 2020 land use survey suggested the number of comparison goods shops in the six main centres is 435 outlets, only 30% of all shop units. The number of food/beverage and non-retail service uses was 645 outlets, over 45% of all shop units. In most centres non-retail services have replaced lost comparison goods uses.

2.33 Property owners, landlords and funds have also come under increasing pressure with struggling occupiers seeking to renegotiate terms through company voluntary arrangement (CVA) i.e. an insolvency process designed to let a firm with debt problems reach an agreement with creditors to help pay off part or all of its debts. Elsewhere, retailers have been continuing to 'right size' their portfolios, with operators announcing store closures. These trends have impacted on rental income and the capital value of retail/leisure assets and are likely to be exacerbated by the coronavirus pandemic, at least in the short-term. Excluding Wood Green, the main centres in the Borough have a relatively small number of national multiple retailers and may be less affected by this rationalisation of store portfolios.

2.34 Whilst the CVA process has created headaches for landlords in terms of rent negotiations, at the same time newly freed-up space has provided new opportunities. Vacated premises have been reconfigured and reused for leisure and entertainment uses.

Food store operators

2.35 In addition to new forms of retailing, retail operators have responded to changes in customers' requirements. Retailers have also changed their trading formats to include smaller store formats capable of being accommodated within town and local centres (such as the Tesco Express/ Metro, Sainsbury's Local, Little Waitrose and Marks & Spencer's Simply Food formats).

2.36 The number of Tesco Express, Sainsbury's Local and Little Waitrose stores has increased significantly during the last decade. Taking Sainsbury's as an example, data provided by Mintel indicates that the number of Sainsbury's Local stores increased by 76% between 2011 and 2016.

2.37 Several proposed larger food stores have not been implemented across the country. There has been a move away from larger stores to smaller formats, reflecting changes in customers' shopping habits. The expansion of European discount food operators Aldi and Lidl has been rapid during the last decade. This trend is evident in Haringey with four discount food stores operated by Aldi and Lidl.

Comparison retailers

2.38 Comparison retailers have also responded to market conditions. The bulky goods warehouse sector has rationalised, including mergers and failures, and scaled down store sizes. Other traditional high street retailers have sought large out-of-centre stores, for example Next and M&S. Matalan also opened numerous discount clothing stores across the UK. Sports clothing retail warehouses including Decathlon and Sports Direct expanded out-of-centre. These trends slowed significantly before the Covid pandemic and are unlikely to re-emerge for the foreseeable future.

2.39 The demand for premises within the bulky goods sector, i.e. furniture, carpets, electrical and DIY goods, has been particularly weak in recent years. This has led to voids on retail warehouse parks and proposals to extend the range of goods sold to non-bulky goods. This can lead to the relocation of retailers creating more vacant units in town centres. The retail warehouse sector is generally well represented in Haringey and in Enfield Borough to the north with concentrations of retail warehouses on purpose built retail parks. However, in the last 5 years there has been pressure to shift from bulky to non-bulky comparison goods and this trend is likely to continue.

2.40 Low density retail warehouses and retail parks have been the subject of higher density mixed use redevelopment proposals. This trend is particularly evident in London where residential land values are high in comparison with retail warehouse parks.

2.41 Within centres, many high street multiple comparison retailers have changed their format. For over two decades, high street national multiples have increasingly sought larger modern shop units (over 200 sq.m) with an increasing polarisation into the larger regional and sub-regional centres. Many multiple retailers now require representation in fewer locations to service catchment areas. This trend is evident in most centres in Haringey with a limited number of comparison goods national multiples present in the smaller District centres.

2.42 In general, operator demand for space has decreased since the last recession and, of those national multiples looking for space, many prefer to locate in larger centres i.e. Wood Green, Brent Cross, Enfield and Central London. Other centres in Haringey are at a lower level in the hierarchy and multiple operator demand may be lower in these centres in the future. Much of the occupier demand in many smaller centres has come from the discount and charity sectors or non-retail services, rather than higher order comparison goods shopping. Polarisation of investment in the larger centres is likely to continue in the future.

2.43 The continuation of these trends will influence future operator requirements in Haringey with smaller centres becoming less attractive for new comparison goods multiple occupiers, and retailers increasingly looking to relocate into larger units in the main centres. However, smaller vacant units could still be attractive to independent traders and non-retail services, assuming a return to normal levels of growth following the Covid-19 pandemic. Within the main centres some anchor comparison goods stores have closed due to national restructuring e.g. the closure of Bhs, Debenhams and House of Fraser stores, which has created large voids in many town centres. This trend has been most evident in Wood Green with the closure of Bhs and Marks & Spencer in recent years.

Charity and discount shops

2.44 The charity shop sector has grown steadily over the past 30 years and there is no sign this trend will end. Planning policies cannot control the amount of charity shops because they fall within the same use class as other shops (now Class E). In many centres, charity shops have occupied vacated shop premises during previous recessions. This trend is evident in Haringey with a strong presence of charity shops in most of the main centres, particularly Crouch End and Muswell Hill. Charity shops can often afford higher rents than small independent occupiers because of business rate discounts. It does not follow that these charity shops will be replaced by traditional shops when the market recovers, particularly in secondary retail frontages.

Non-retail services

2.45 Service uses perform an important role in the overall offer of a centre and encourage customers to shop locally. The non-retail service uses include the following Class E and Sui Generis uses:

- hairdressers, dry cleaners, travel agents, some sandwich shops (those not categorised as takeaways), funeral parlours and post offices;

- banks, building societies, financial services, betting offices, pawnbrokers, estate agents and employment agencies;
- restaurants, cafés and hot food takeaways; and
- pubs/bars.

2.46 The growth of money lending/pay day loan shops, betting shops and hot food takeaways has raised concerns amongst many local planning authorities and has resulted in a change to permitted development rights to control the growth of these uses in town centres. These uses are now sui generis with no permitted changes of use. This trend has been evident in parts of Haringey Borough with relatively high proportions of betting shops/amusement arcades in Wood Green, Bruce Grove and Green Lanes. The provision of hot food takeaways is higher than the national average in Wood Green, Green Lanes and West Green Road/Seven Sisters, as shown in Section 3 and Appendix 5.

2.47 Past changes to the GPDO has had an impact on some town centres but the more recent changes to the Use Classes Order (UCO) are likely to lead to more significant changes in the future. These measures allow for much greater flexibility for changes of use from retail to non-retail uses. To date these measures have not significantly changed the composition of most town centres.

Food/beverage, leisure and entertainment

2.48 Food/beverage, leisure and entertainment are fast moving and creative sectors, with a steady flow of new concepts emerging. Some of these uses have led to a growth in the evening economy in town centres, particularly restaurants, pubs/bars and entertainment activities. Within these sectors there has been a significant increase in the number of national multiple chains which have sought to increase their geographical coverage, but primarily in larger centres.

2.49 Recently some restaurant chains have experienced difficulties resulting in closures, which suggests operators may have over-stretched. Demand has continued to increase for coffee shops, such as Starbucks, Costa Coffee and Café Nero. National branded pub/restaurant chains have invested heavily and not exclusively in larger centres. Themed restaurants have also expanded rapidly. This sector in town centres has been the most adversely affected by the Covid-19 crisis and the potential for growth in the short-term is uncertain.

2.50 The key categories for food and beverage offer are:

- *Impulse*: characterised by their produce range that is typically highly visual and hand-held so that it can be eaten "on the go";
- *Speed eating fast food*: food that can be purchased and consumed quickly, therefore price is low and ambience is less important. This sector is dominated by traditional high volume fast food offers such as burgers and fried chicken;
- *Refuel and relax*: a drink, snack and a short break in a pleasant environment rather than focusing on eating a main meal; and
- *Casual dining/leisure dining*: incorporating several food styles, types and ethnic origins. The ambience and environment of casual dining is as important as the food, drink and service provided. The style is informal but is normally table service.

2.51 The proportion of non-retail uses within town centres across the country has increased significantly. This trend has been experienced in Haringey, but a short term reduction seems likely following the Covid-19 crisis. The mix of uses within Haringey's main centres is explored in more detail in Appendix 5.

Pop-up spaces

2.52 The increase in vacant space has led to an increase in premises available for temporary uses or pop-up uses including pop-up restaurants, pop-up bars, pop-up shops and pop-up galleries. Some landlords have opted for flexible leases, with changing attitudes towards short-term spaces. New independent brands have benefitted despite the lack of brand recognition. E-commerce brands have also sought physical presence, as an essential part of their marketing strategy and an effective way to engage with existing and new customers off-line. Brands have opened pop-up outlets in different locations in order to test and learn before committing to permanent stores. This trend may increase following the Covid-19 crisis.

National policy and other changes

2.53 The NPPF indicates planning policies should (para. 85):

1 define a network and hierarchy of town centres and promote their long-term vitality and viability - by allowing them to grow and diversify in a way that can respond to rapid changes in the retail and leisure industries, allows a suitable mix of uses (including housing) and reflects their distinctive characters;

2 define the extent of town centres and primary shopping areas, and make clear the range of uses permitted in such locations, as part of a positive strategy for the future of each centre;

3 retain and enhance existing markets and, where appropriate, re-introduce or create new ones;

4 allocate a range of suitable sites in town centres to meet the scale and type of development likely to be needed, looking at least ten years ahead. Meeting anticipated needs for retail, leisure, office and other main town centre uses over this period should not be compromised by limited site availability, so town centre boundaries should be kept under review where necessary;

5 where suitable and viable town centre sites are not available for main town centre uses, allocate appropriate edge of centre sites that are well connected to the town centre. If enough edge of centre sites cannot be identified, policies should explain how identified needs can be met in other accessible locations that are well connected to the town centre; and

6 recognise that residential development often plays an important role in ensuring the vitality of centres and encourage residential development on appropriate sites.

2.54 The rapid changes that are affecting the retail sector and town centres are acknowledged and reflected in the NPPF. It recognises that diversification is key to the long-term vitality and viability of town centres, to 'respond to rapid changes in the retail and leisure industries'. Accordingly, planning policies should clarify 'the range of uses permitted in such locations, as part of a positive strategy for the future of each centre'.

2.55 The appropriate balance between retail and other town centre activity has been debated in recent years, as town centres increasingly need to compete with on-line shopping. The Covid-19 crisis has elevated this debate. Online shopping is likely to grow faster than previously expected due to shifts in customer behaviour accelerated by the Covid-19 crisis. The need for a better mix of uses within town centre will become increasingly important. A broader mix of uses should extend activity throughout the daytime and into the evenings.

2.56 On 1 September 2020, the UCO was significantly amended. Changes to town centre use classes now allow far greater flexibility for uses to change within town centres without the need to obtain planning permission. The UCO has significant implications for shop frontage planning

policies, restricting the ability of local planning authorities to control the mix of uses and retain specific uses previously protected e.g. Class A1 retail.

2.57 In relation to main town centre uses, as defined in the NPPF Annex 2 glossary, the UCO changes provide for three new use classes:

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

2.58 The UCO changes now combine: Shops (A1), financial/professional services (A2), cafés/restaurants (A3), indoor sports/fitness (D2 part), medical health facilities (D1 part), creche/nurseries and office/business uses (B1) into the new single Use Class E. The new Class E includes some uses that are not defined as 'main town centre uses" within the NPPF e.g. medical services and some light industrial uses.

2.59 Other changes potentially introduce more restrictions rather than flexibility. Partly in response to the impact of the Covid-19 crisis, there is added protection against the loss of learning, non-residential and community facilities, including museums public halls, sports facilities and local shops. These uses are now included in new Classes F.1 and F.2. Class F.2 also includes small isolated shops (at least 1 kilometre from a similar shop) selling essential goods including food. However, there are unlikely to be isolated shops of this kind in Haringey due to the urban nature of the Borough and the close proximity of designated local centres.

2.60 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. The inclusion of these uses as Sui Generis appears to have a dual function i.e. controlling potential 'bad neighbour' uses such as pub/bars and takeaways, whilst protecting against the loss of other cultural facilities such as cinemas and music venues, most vulnerable to the impacts of Covid-19.

2.61 The previous distinction between Class A3, A4 and A5 uses will now become more critical, with Class A3 uses now having more flexibility in the new Class E, but more limited flexibility for Class A4 and A5 uses. Many Class A3 restaurants have offered a takeaway service during the Covid-19 crisis and the categorisation of bar/restaurants has always been arguable and will be a matter of fact and degree on a case-by-case basis. In response to these changes, LBH will need to re-categorise existing uses within town centres for monitoring purposes to reflect the new UCO, which will be helpful when considering appropriate policy options. The implications of these changes for future policy options is addressed in Section 6 of this report.

2.62 The potential implications of permitted changes in use outside town centres may also have unintended consequences. In theory large out-of-centre B1 office buildings or D2 commercial leisure uses, with no restrictive conditions, could be converted to retail use without planning permission or an assessment of the impact on the town centre or application of the sequential test. Allowing retail uses to occupy out-of-centre buildings could run counter to the objective of maintaining and enhancing town centres. This change could have implications for the effectiveness of retail impact and sequential test policies. Haringey Borough could potentially be affected by this loop-hole, but the number of out-of-centre office or leisure buildings suitable for conversion to retail is likely to be limited. The main risk in Haringey may be retail, restaurants, gyms popping up on industrial estates and creating issues relating to the employment offer/mix of uses in industrial areas. Furthermore, operator demand for large stores may be limited particularly comparison goods retailing. The demand for high density residential led mixed use development is likely to be stronger than for retail uses. Nevertheless, this potential future trend should be monitored.

2.63 The Government has introduced further changes to permitted development rights relating to housing delivery and public service infrastructure. These changes have included the Class E to Class C3 permitted development right. A new Class MA business and commercial to residential permitted development right has replaced and introduced certain commercial to residential permitted development rights (as from 1 August 2021). The new class MA is different to previous retail and office to residential PD rights, with several different limitations and conditions. Delivering housing and the reuse of redundant shopping space is the Government's priority and the Class MA permitted development right emphasises this.

2.64 The new permitted development rights effectively reduce the scope of office to residential permitted development while increasing the scope of retail to residential and introduce new PD rights for other town centre uses to change to residential. These PD rights are subject to floorspace, vacancy and location limitations.

2.65 Class MA will allow many properties within Class E to change to residential without consideration of impact on the high street where the proposal is outside of a conservation area and limited consideration if it is within a conservation area. The impact on the character and sustainability of the conservation area needs to be considered for ground floor proposals. There may also be restrictive planning conditions or legal agreements that prevent change of use via Class MA.

2.66 Only listed buildings and their curtilage and properties in the most sensitive locations such as World Heritage Sites, National Parks and Areas of Outstanding National Beauty will be excluded from the new PD right. The legislation requires assessment of loss of retail and office in beautiful and heritage locations, but in no other retail or business destinations. The retail assessment required by the current Class M PD right will fall away.

2.67 Subject to limitations and conditions, former uses classes Class A1 (shops); Class A2 (financial and professional services); Class A3 (food and drink); Class B1 (business); Class D1(a) (non-residential institutions – medical or health services); Class D1(b) (non-residential institutions – crèche, day nursery or day centre) and Class D2(e) (assembly and leisure – indoor and outdoor sports), other than use as an indoor swimming pool or skating rink, will benefit from the Class MA PD rights.

2.68 The permitted development right does not apply if more than 1,500 sq.m of cumulative floorspace is to be converted. This is significantly more than the 150 sqm permitted under Class M retail to residential at present, but a significant new restriction for office to residential change of use via permitted development. Most retail units within town centres are below this threshold and converting only part of a building is permitted.

2.69 To benefit from Class MA, the use of the building must have fallen within Class E or one or more of the uses that it replaced for at least two years continuously prior to the date the prior approval application is made. The building must have been vacant for a continuous period of at least 3 months immediately prior to the date of the application for prior approval, but periods of closure as a result of Government Covid-19 restrictions will not count towards the vacancy period where the building continues to be occupied by the owner or tenant. A key change is that prior approval will no longer be required to consider the impact arising from the loss of retail uses i.e. the implications for the town centre's overall vitality and viability.

2.70 In a conservation area and where the change of use is at ground floor level, the impact on the character and sustainability of the conservation area is another new prior approval matter. Addressing this matter could potentially include a limited assessment of retail impact.

2.71 The requirement to meet residential space standards has come into force. The GPDO does not grant permission for any dwelling that would be less than 37 sq.m or would not comply with the nationally described space standard.

Summary

2.72 The trends and changes highlighted in this section, including the growth of home shopping are not new and have been affecting the high street for many years. In response to these trends, town centres have changed and diversified. The food and beverage, leisure and non-retail service sectors have been successful in occupying space no longer attractive to retail tenants. There have been cyclical trends in vacancy rates reflecting the macro economic trends, but in most cases, town centres recovered during periods of stronger growth. Many believe the most recent decline is structural rather than cyclical and a more flexible approach to town centre uses is required.

2.73 The most recent trends suggest vacancy rates have been slow to recover in weaker centres, and many high street retailers are still experiencing difficulties. The Goad national shop vacancy rate increased to over 14% during the last recession but has not returned to pre-recession levels (around 8%). The national vacancy rate remains over 12% and is expected to increase following the Covid-19 crisis, and therefore a cautious approach to future growth is required.

2.74 Shopping behaviour will continue to change, and the high street must respond. All centres will need to focus on their advantages over other forms of multi-channel shopping, for example using the internet as an extended shop window, click and collect facilities and providing a combined retail and leisure experience for those looking for a "day out" or "evening out".

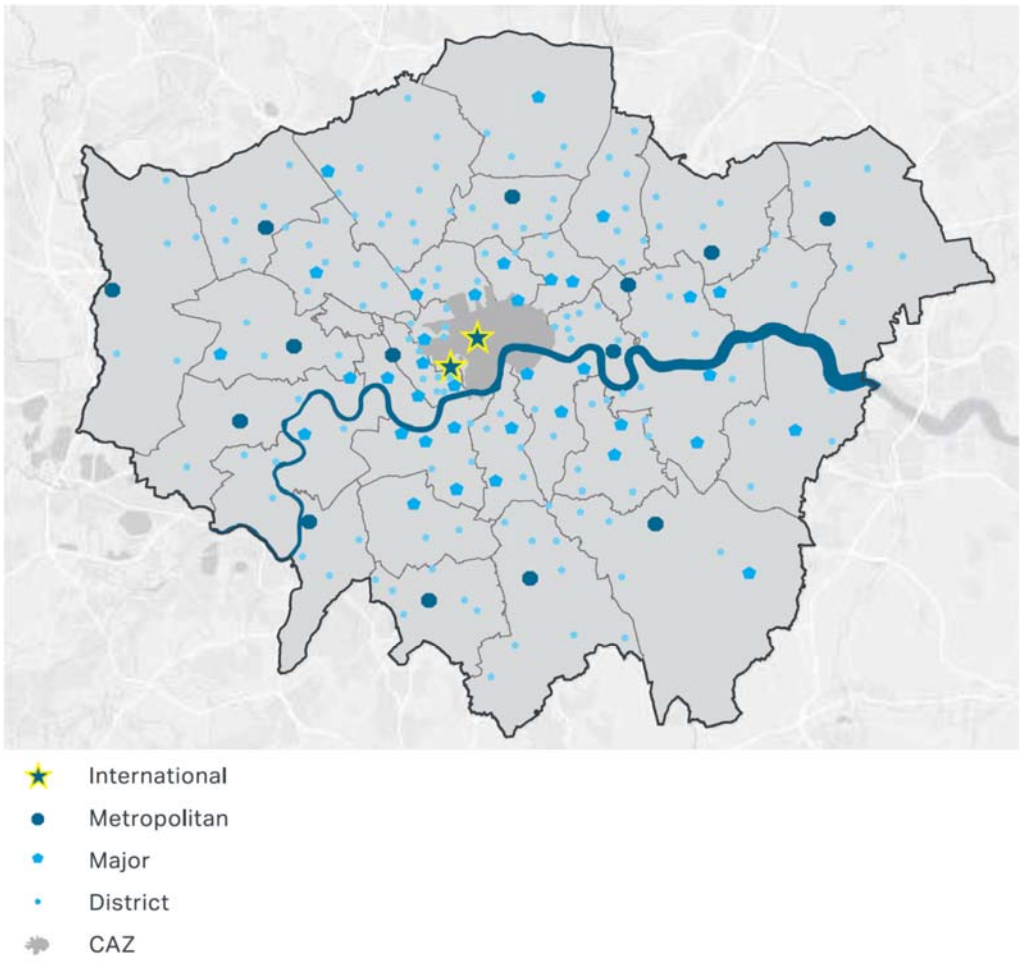
2.75 The recent changes to the UCO and PDR are likely to have significant implications for town centres. These changes will significantly restrict the Council's ability to control the mix of uses within centres through a plan-led approach.

3.0 Hierarchy of centres

The London Plan hierarchy

3.1 The London Plan (2021) sets out the London wide hierarchy of main centres down to District Centre level, as shown below in Figure 3.1. The two International Centres are in Central London. Westfield at Shepherds Bush is expected to become a new International Centre. The outer London suburbs are served by Metropolitan Centres including Wood Green, Harrow and Stratford. Haringey Borough has no Major Centres at the next third tier level in the hierarchy, e.g. Edgware, Enfield, Hackney and Walthamstow. Haringey has five District Centres at Bruce Grove/Tottenham High Road, Crouch End, Green Lanes, Muswell Hill and West Green Road/Seven Sisters. Finsbury Park is also a designated District Centre but is located predominantly in LB Islington.

Figure 3.1 London's town centre network



Source: GLA London Plan (2021)

3.2 The London Plan indicates Metropolitan Centres serve wide catchment areas covering several boroughs, typically containing at least 100,000 sq.m of retail, leisure and service floorspace and a high proportion of higher order comparison goods shopping when compared with its convenience goods offer. These centres also have a significant employment, leisure and service functions and civic and public buildings.

3.3 Major Centres such as Enfield and Walthamstow usually have over 50,000 sq.m of retail, leisure and service floorspace but only have a borough wide catchment area. District Centres are smaller between 5,000 to 50,000 sq.m of retail, leisure and service floorspace space. Local and neighbourhood centres are not identified in the London Plan and are expected to serve localised catchment areas. The scale and mix of uses within the sub-region based on data from the GLA's 2017 London Town Centres Health Checks is shown in Table 3.1.

Table 3.1 GLA London main town centres in Haringey and neighbouring boroughs compared with the West End

Centre	London Plan classification	No. retail and service outlets	Comparison goods floorspace sq.m gross	Convenience goods floorspace sq.m gross	Service floorspace sq.m gross	Total floorspace sq.m gross
West End	International	1,289	445,847	15,874	12,735	474,456
Stratford	Metropolitan	292	129,610	23,590	2,510	155,710
Wood Green	Metropolitan	218	58,005	15,940	3,450	77,395
Harrow	Metropolitan	179	59,593	10,240	4,750	74,583
Walthamstow	Major	312	32,505	18,910	6,450	57,865
Angel	Major	276	23,472	10,710	5,750	39,932
Camden Town	Major	253	23,576	15,908	5,880	45,364
Edgware	Major	166	17,250	9,710	5,380	32,340
Nags Head	Major	153	26,400	11,570	4,090	42,060
Dalston	Major	147	16,493	9,730	4,210	30,433
Enfield Town	Major	136	38,149	8,540	3,820	50,509
Finsbury Park	District	190	11,560	7,540	4,210	23,310
North Finchley	District	141	10,295	5,850	4,100	20,245
Stoke Newington	District	131	8,600	9,010	4,870	22,480
Hampstead	District	126	7,958	1,970	2,860	12,788
Crouch End	District	124	7,600	4,670	3,710	15,980
Muswell Hill	District	123	9,100	5,050	3,930	18,080
Bakers Arms	District	119	6,560	7,980	4,240	18,780
Green Lanes	District	110	10,840	9,300	3,180	23,320
Edmonton Green	District	109	15,410	11,490	2,800	29,700
Palmers Green	District	95	6,180	7,350	3,270	16,800
Golders Green	District	94	6,060	5,320	3,370	14,750
South Chingford	District	90	7,310	4,480	3,300	15,090
Southgate	District	87	4,190	9,460	2,990	16,640
Mare Street	District	87	8,600	7,020	2,110	17,730
West Green Rd/Seven Sisters	District	82	2,470	9,120	1,790	13,380
Kentish Town	District	78	4,220	4,920	3,130	12,270
Angel Edmonton	District	73	7,374	5,830	1,850	15,054
Archway	District	69	4,780	3,270	2,360	10,410
West Hampstead	District	64	2,080	2,060	2,010	6,150
East Finchley	District	60	4,700	2,890	2,230	9,820
Whetstone	District	59	6,520	3,170	2,270	11,960
Bruce Grove/Tottenham HR	District	56	4,750	3,100	1,160	9,010
Leyton	District	51	11,820	11,800	1,110	24,730
Tottenham Hale	Potential District	19	16,110	1,690	110	17,910

Source: GLA 2017 London Town Centres Health Check data.

3.4 This data demonstrates that GLA International and Metropolitan Centres have over 75,000 sq.m of retail/service floorspace. Major Centres generally range from 30,000 to 50,000 sq.m, and Wood Green is significantly larger than the top end of this range, consistent with its designation as a Metropolitan Centre. District Centres are generally below 25,000 sq.m but vary significantly in size.

Relative attraction of centres

3.5 The Javelin Group's Venuescore ranks over 3,500 retail destinations in the UK including town centres, malls, retail warehouse parks and factory outlet centres across the country. Each destination is given a weighted score based on the number of multiple retailers present, including anchor stores, fashion operators and non-fashion multiples. The score attached to each retailer is weighted depending on their overall impact on shopping patterns, e.g. a department store will achieve a high score. The results for the town centre destinations and other relevant centres outside the study area are shown in Table 3.2.

Table 3.2 Javelin's Venuescore UK shopping Index

Centre	UK Rank 2017	Venuescore 2017	Market position
London, West End	1	1,625	upper middle
Westfield Stratford City	26	325	upper middle
Harrow	97	184	middle
Camden Town	127	168	middle
Wood Green	132	166	middle
Angel	133	165	upper middle
Enfield Town	192	125	middle
Walthamstow	203	120	lower middle
Holloway (Nags Head)	250	101	middle
Edgware	312	86	middle
Hackney (Mare Street)	355	78	middle
North Finchley	433	66	middle
Dalston	463	63	lower middle
Muswell Hill	463	63	upper middle
Hampstead	537	56	upscale
(Lower) Edmonton Green	558	54	lower middle
Palmers Green	579	52	middle
Tottenham Hale	696	44	lower middle
Crouch End	781	40	middle
South Chingford	781	40	lower middle
Kentish Town	799	39	middle
Golders Green	912	35	middle
Southgate	968	33	middle
West Hampstead	1,111	29	upper middle
Leyton	1,140	28	lower middle
Stoke Newington	1,187	27	middle
Whetstone	1,187	27	middle
Bruce Grove/Tottenham High Rd.	1,418	22	lower middle
Finsbury Park	1,559	20	middle
Haringey (Green Lanes)	2,377	13	middle
East Finchley	2,566	12	middle

Source: Javelin Group 2017

3.6 Each shopping destination is given a weighted score for multiple retailers present. The score attached to each retailer is weighted depending on their overall impact on shopping patterns. The Venuescore usually correlates to the actual market size of the shopping destination in terms of consumer expenditure, but some larger shopping centres such as Stratford (Westfield) have fewer but larger stores and town centres with a higher proportion of independent stores can generate spending levels in excess of their relative Venuescore. West Green Road/Seven Sisters district centre does not have a rank or Venuescore due to the limited provision of comparison goods national multiples in the centre.

3.7 This Javelin information is used in the retail industry to assess the relative strength of shopping destinations. Javelin also assesses the market position of centres based on the retailers present and the centre's relative position along a spectrum running from discount to luxury or down-market to aspirational (i.e. lower, middle to upscale), also shown in Table 3.2.

3.8 The market position relates specifically to the fashion offer together with others easily classified operators, because the range and choice of clothing and fashion shopping is the key driver in the relative attraction of large comparison shopping destinations. The Venuescore data is weighted towards clothing and fashion retailing. Clothing/fashion shopping facilities are primarily focused in the larger centres.

3.9 Consistent with the London Plan, the Javelin index ranks Wood Green as the main centre within the Borough. Other centres in Haringey feature much lower in the rankings and achieve relatively low scores. Central London and Stratford Westfields are ranked at the top of the hierarchy. Other GLA Metropolitan Centres at Wood Green and Harrow are all ranked within the top 150, and their scores reflect the higher number of national multiple retailers.

3.10 The top ranked centres also have the higher market positions, with a focus on luxury rather than discount products. London West End, Westfield Stratford and Angel have upper middle market positions. Wood Green is below these centres with a middle market position, along with Harrow. Most other centres with the sub-region have a middle or lower middle market position. Muswell Hill performs well in terms of its market position (upper middle), comparable with West Hampstead. Overall, the Javelin analysis suggests residents within Haringey have a good choice of shopping destinations, which provide a good range of clothes/ fashion shops, including independent shops and multiples.

Designated Centres in Haringey

3.11 Designated centres in the Borough are summarised in Table 3.3 overleaf, based on the Local Data Company's land use survey for the main centre in 2020 and Lichfields' survey of local centres in 2021. The information in Table 3.3 only includes ground floor uses that were in the previous Use Classes Order retail and service uses within Class A1, A2, A3, A4 or A5. Table 3.3 excludes leisure and community with previous Use Class Order uses in Class D1 sand D2.

3.12 This information confirms Wood Green is the largest centre in terms of the total number of retail/service units and the number of comparison goods retail outlets, consistent with the GLA description of Metropolitan Centres. The five District Centres, excluding Finsbury Park within LB Islington, are much smaller and vary significantly in terms of the total number of shop units i.e. between 167 to 297 units. All District Centres have a good mix of retail and service facilities. Local Centres are smaller and have a more limited range and choice of comparison goods shopping. However, local centres vary significantly in size ranging from less than 10 to over 100 units. Archway Road is the largest local centre (118 units). It is a very long linear centres that is effectively a series of connected parades that do not function as a single shopping destination in the same way as District Centres.

Table 3.3 Haringey designated centres – number of outlets by use (2020/2021)

Centre	Total retail service units	Comparison goods retail	Convenience goods retail	Food/ beverage	Non-retail services	Vacant units
Metropolitan centres						
Wood Green	367	152	49	64	78	24
District centres						
West Green Rd/Seven Sisters	297	44	69	61	91	32
Finsbury Park*	271	82	35	71	60	23
Crouch End	235	68	25	50	67	25
Muswell Hill	193	83	21	36	42	11
Bruce Grove/Tottenham	174	44	33	28	48	21
Green Lanes	167	44	25	35	45	18
Local centres						
Alexandra Park Road	28	3	5	6	10	4
Archway Road	118	25	10	22	45	16
Aylmer Parade	23	3	3	3	10	4
Bounds Green	25	3	6	8	8	0
Broad Lane	34	3	4	7	14	7
Commerce Road	12	1	3	2	6	0
Cranley Parade	7	3	1	1	1	1
Craven Park Road	4	0	2	1	1	0
Crescent Road	25	0	3	6	13	3
Ferme Park Road	12	1	1	3	7	0
Great Cambridge Road	29	7	5	5	8	4
Green Lanes	10	0	2	3	5	0
Hermitage Road	5	0	2	1	0	2
Highgate High Street	33	5	4	7	14	3
Hornsey High Street	81	16	7	27	21	10
Lordship Lane East	11	3	4	3	0	1
Lordship Lane Roundway	92	10	20	21	29	12
Lordship Lane West	29	0	7	8	11	3
Lordship Lane Central	13	1	3	1	5	3
Midhurst Parade	6	1	2	0	2	1
Myddleton Road	64	10	3	13	23	15
Park Lane	22	2	3	6	8	3
Park Road/Priory Road	30	4	3	8	12	3
Philip Lane East	20	4	1	6	7	2
Philip Lane West	28	4	5	10	9	0
Quernmore Road	10	2	1	1	3	3
Seven Sisters Road	35	7	4	9	8	7
Stroud Green Road North	15	6	3	1	4	1
Stroud Green Road South	16	1	1	6	5	3
Tottenham Lane, N8 (East)	34	5	3	8	12	6
Tottenham Lane, N8 (West)	17	2	2	6	7	0
Tottenham High Rd North	83	14	13	20	32	4
Turnpike Lane	88	16	12	25	23	12
Westbury Avenue	20	4	3	3	7	3
West Green Road Central	36	7	5	10	12	2
West Green Road West	58	5	6	11	27	9
Weston Park, N8	11	2	3	2	4	0
Wood Green High Rd North	13	2	4	3	3	1
Total	**2,901**	**699**	**426**	**628**	**847**	**302**

Source: Local Data Company land uses survey 2020 and Lichfields' survey of local centres (June 2021).

*predominantly in LB Islington

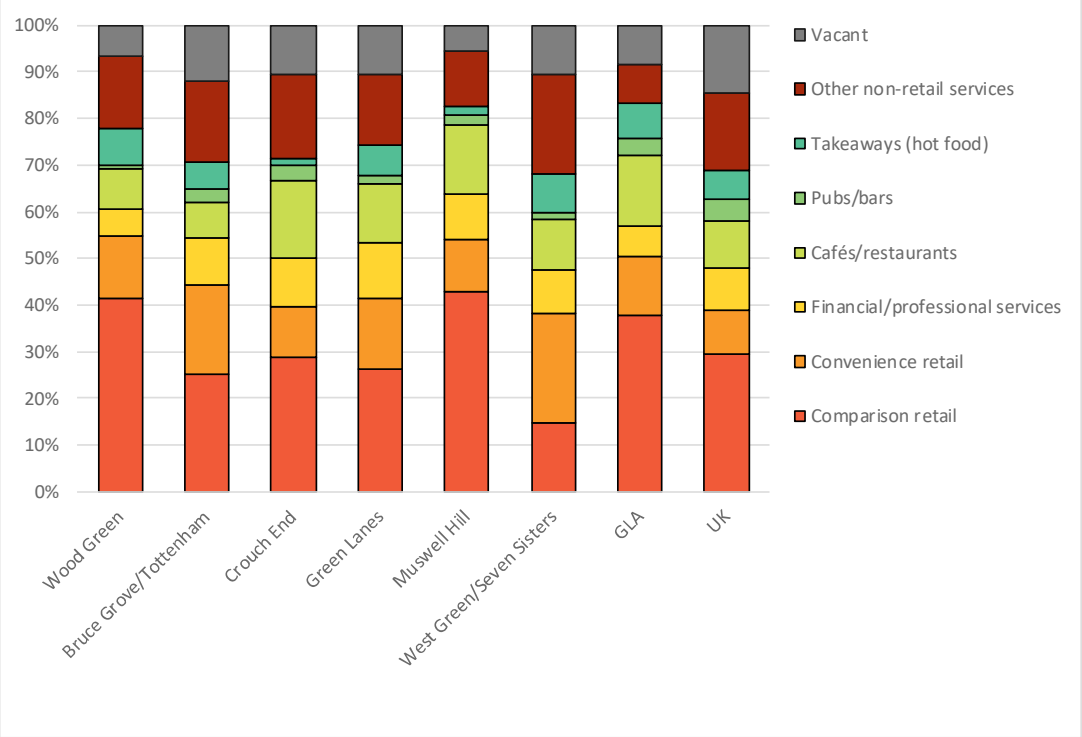
Diversity of main town centre uses

3.13 Figure 3.4 below shows the composition of the six main centres in terms of the mix and proportion of different uses i.e. the proportion of shop units within each use class. This is compared with the GLA and Goad Plan average mix for all centres across the UK. More detail is provided in the health check analysis in Appendix 5.

3.14 The centres have a good mix of retail and service uses, but all centres except Wood Green and Muswell Hill have a lower proportion of comparison goods retail units than the GLA and national averages. All centres in the Borough have a reasonably high proportion of convenience goods retail and non-retail services, but a low proportion of pubs/bars.

3.15 Vacancy rates are generally lower than the UK average (12.4%) and around the GLA average (8.6%) in 2016. Bruce Grove/Tottenham High Road has the highest vacancy rate (12.1%) marginally below the national average. The combined vacancy rate across the Borough's six main centres was 9.1% in 2020. It should be noted that the vacancy rate across the Borough only relates to uses within the previous Use Classes A1 to A5. Furthermore, the vacancy rates are based on the Local Data Company's 2020 land uses survey, where the number of vacant units may be overstated due to the Covid-19 lockdowns. The Council's more recent land use survey in the main centres in September 2021 suggests vacancy rates have fallen significantly since 2021, with business re-opening after Covid-19 lockdowns.

Figure 3.4 Mix of retail and service uses



Source: Local Data Company land uses survey 2020 and Experian Goad Plans UK average 2020.

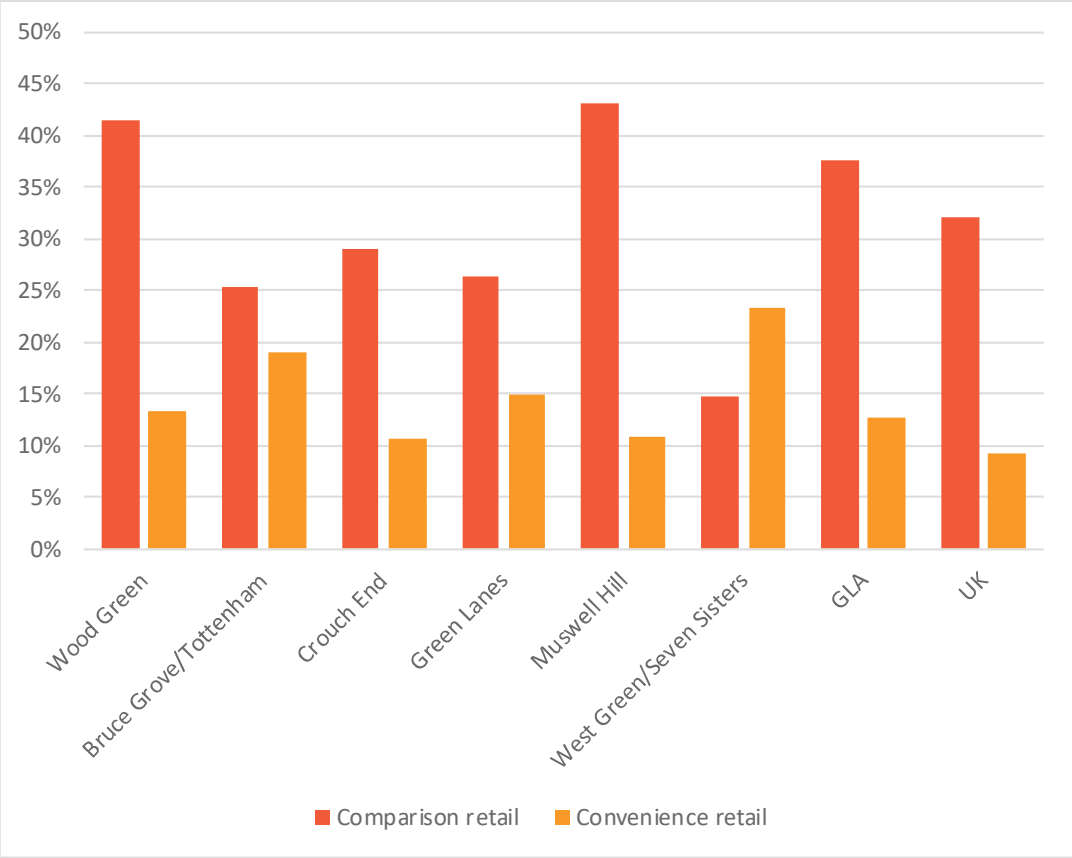
Retailer representation

3.16 Figure 3.5 compares the proportion of convenience and comparison retail units within the six main centres compared with the GLA and national averages. All centres have a higher proportion of convenience goods units when compared with the national average. Convenience

goods representation is particularly strong in Bruce Grove/Tottenham High Road, Green Lanes and West Green Road/Seven Sisters. Conversely comparison goods retail is relatively weak in these three centres. Wood Green and Muswell Hill have a high proportion of comparison goods retail uses when compared with the GLA and national averages.

3.17 Generally larger centres have a higher proportion of comparison shop units than smaller centres. Larger centres tend to have a stronger focus on fashion shopping and therefore have a higher proportion of comparison shops. Smaller centres tend to have a higher proportion of convenience goods units and non-retail services, catering for the day to day needs of their local catchment area. This is reflected in Haringey's District Centres, apart from Muswell Hill. Convenience goods retail and non-retail services perform an important role in District Centres for relatively localised needs.

Figure 3.5 Proportion of comparison and convenience retail (% total units)



Source: Local Data Company land uses survey 2020 and Experian Goad Plans.

Service Uses

3.18 Service uses perform an important role in the overall offer of a centre and encourage customers to shop locally. Figures 3.6 and 3.7 below summarises the number and proportion of units in different service categories uses compared with the Goad national average. The service uses are categorised as follows:

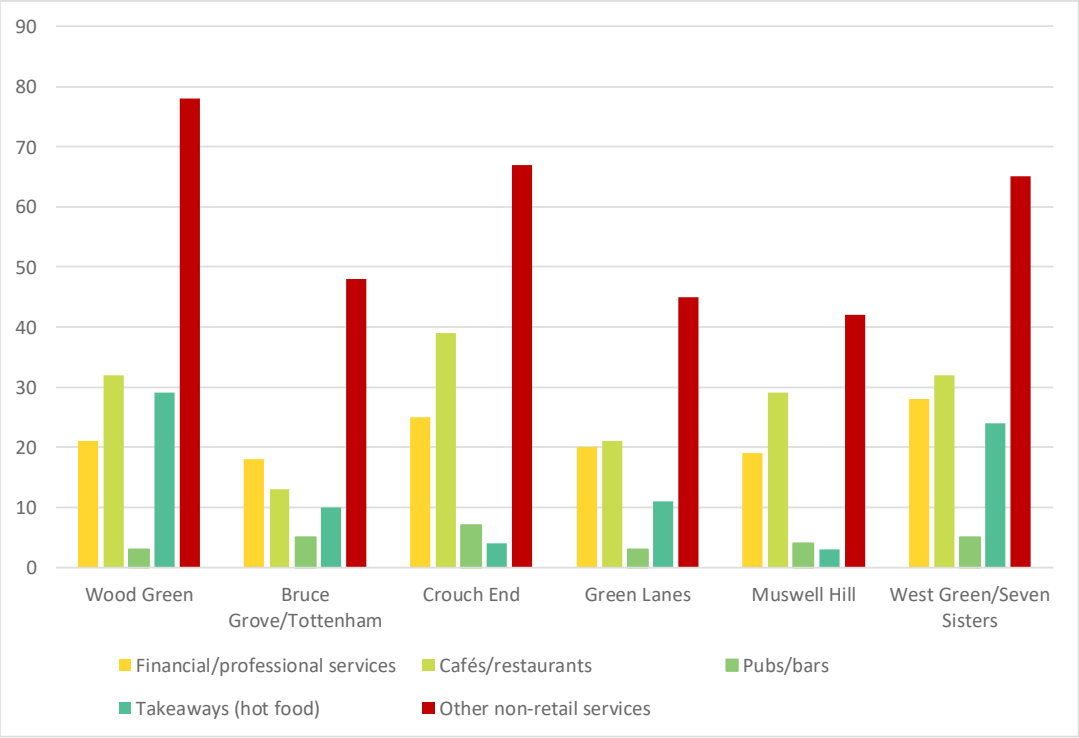
- Financial and professional services including banks, building societies, financial services, estate agents and employment agencies.
- Food/beverage uses including restaurants, cafés, pubs, bars and hot food takeaways.

- Other non-retail services including a wide range of uses, such as hairdressers, dry-cleaners, travel agents, beauty salons and post offices.

3.19 The proportion provision (Figure 3.7) of financial/professional is generally around the national average, apart from a relatively low provision in Wood Green. However, Wood Green is a large centre and still has 21 financial/professional outlets.

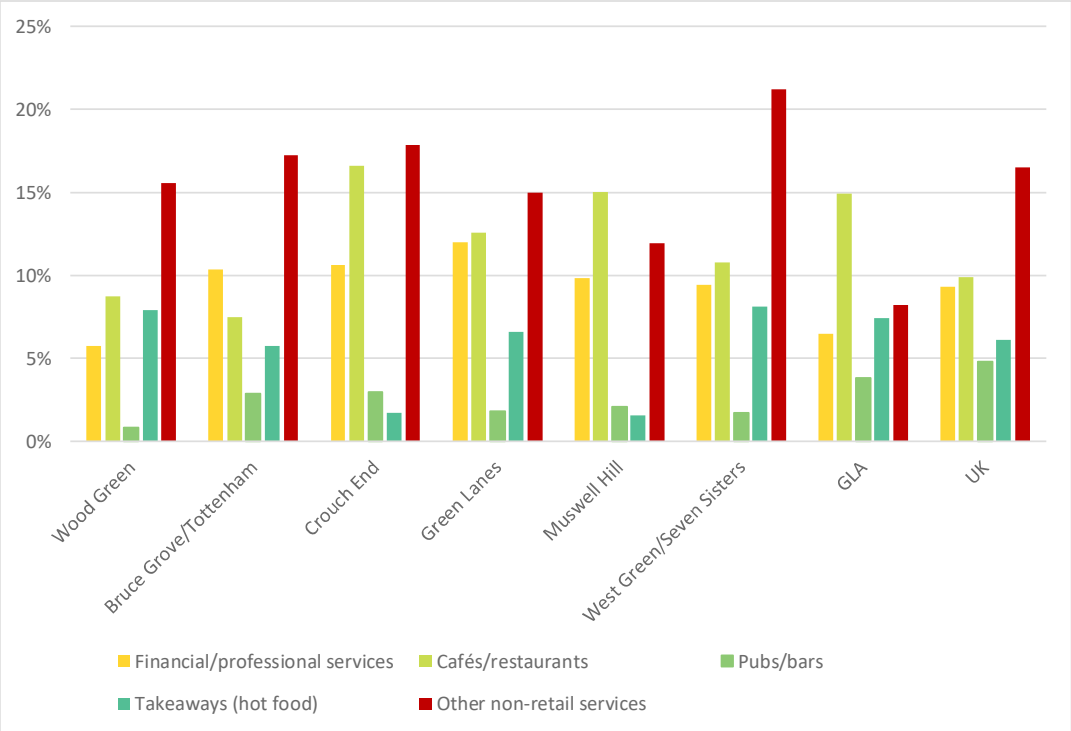
3.20 All centres apart from Muswell Hill have a relatively high proportion of other non-retail services. The provision of café/restaurants is relatively strong in Crouch End and Muswell Hill, but weaker in Wood Green and Bruce Grove/ Tottenham High Road. Wood Green and West Green Road/Seven Sisters have a relatively high provision of hot food takeaways.

Figure 3.6 Total number of non-retail service uses



Source: Local Data Company land uses survey 2020

Figure 3.7 Proportion of non-retail service uses (% all units)



Source: Local Data Company land uses survey 2020 and Experian Goad Plans

3.21 The six main centres have a varied provision of food/beverage outlets serving either the day-time or evening economies. Crouch End and Muswell Hill appear to have the strongest provision of outlets serving the evening economy i.e. restaurants (rather than cafés and coffee shops). Wood Green, Bruce Grove/Tottenham and West Green Road/Seven Sisters have the weakest provision of restaurants and pubs/bar serving the evening economy in relation to their size.

Summary

3.22 The analysis of the hierarchy of centres in this section indicates the Borough has a well-established network of centres that currently serve their respective areas. Wood Green is the only centre with a truly borough-wide catchment area. The health of the main centres is assessed in more detail in Appendix 5. The shop vacancy rate has increased but in most centres is below or comparable with the national average. Continuing to identify the hierarchy of centres in future development plans is important in terms of:

- ensuring the vitality and viability of town and local centres is maintained and enhanced as important hubs for the community, through the application of the impact test;
- directing retail and main town centre uses to appropriate accessible and sustainable locations, through the application of the sequential approach to site selection; and
- identifying a viable role and strategy for each centre.

3.23 The network of town centres and local centre should continue to be protected and enhanced to ensure appropriate accessibility to important facilities for all sections of the community and to ensure sustainable shopping patterns.

4.0 Retail and food/beverage need assessment

Introduction

4.1 This section updates the quantitative and qualitative need for retail uses within Haringey. The National Planning Policy Framework (NPPF) indicates that local planning authorities should positively seek opportunities to meet the development needs of their area, and Local Plans should meet objectively assessed needs.

4.2 This section sets out the methodology adopted for this analysis and provides a quantitative capacity analysis in terms of levels of spending for convenience and comparison shopping and food/beverage (eating and drinking away from the home).

Assumptions and base data

4.3 All monetary values expressed in this study are at 2019 prices, consistent with Experian's base year expenditure figures for 2019 which is the most up to date information available.

Study area zones and population

4.4 A household telephone survey was undertaken in order to quantify existing shopping and leisure patterns in July 2021. The study area includes the administrative area of Haringey Borough and parts of neighbouring boroughs. The study area is sub-divided into 8 zones as shown in Appendix 1, based on ward boundaries, reflecting the primary catchment areas of the main destinations within LB Haringey.

4.5 The projected population within each zone between 2021 to 2038 is set out in Table 1 in Appendix 2, based on GLA 2018-base projections for wards (housing trajectory projections). The base year 2021 population within LB Haringey (zones 1 to 4) is 271,063. This population is projected to increase to 295,932 by 2038, an increase of about 9.2%.

Retail Expenditure

4.6 The level of available expenditure to support retailers is based on first establishing per capita levels of spending for the study area population. Experian's local consumer expenditure estimates for comparison and convenience goods for each of the study area zones for the year 2019 have been obtained.

4.7 Experian's latest EBS national expenditure information (Experian Retail Planner Briefing Note 18 - October 2020) has been used to forecast expenditure within LB Haringey. Experian's short term EBS growth forecast rates during 2020, 2021 and 2022 reflect current economic circumstances, including the current Covid-19 crisis. The forecast changes during this period are as follows:

- convenience goods: +4.2%;
- comparison goods: +1.2%;
- leisure: -12.6%.

4.8 These short-term forecasts, particularly for comparison goods and leisure, are relatively cautious. In the longer term it is more difficult to forecast year on year changes in expenditure. Experian's medium and long-term growth average forecasts have been adopted, as follows:

- convenience goods: 0% per annum growth for 2023 to 2027 and +0.1% per annum after 2027;

- comparison goods: +3.0% per annum growth for 2023 to 2027 and +2.9% per annum after 2027; and
- leisure: +2.9% per annum growth for 2023 to 2027 and +0.9% per annum after 2027.

4.9 These growth figures relate to real growth and exclude inflation.

4.10 Experian's latest adjusted deductions for SFT (i.e. home and online shopping through non-retail businesses) in 2019 were:

- 4.2% of convenience goods expenditure; and
- 17.5% of comparison goods expenditure.

4.11 Experian's projections suggest that these percentages will increase to 6.6% and 26.2% by 2028 respectively. The longer-term Experian projections suggest an increase to 7.3% and 28.5% by 2038 respectively.

4.12 Table 2 in Appendix 2 sets out the updated forecasts for spending per head on convenience goods within each zone in the study area up to 2038, excluding SFT. Average convenience goods expenditure is expected to reduce due to a higher proportional increase in SFT. Forecasts for comparison goods spending per capita are shown in Table 2 in Appendix 2 and food/beverage expenditure is shown in Table 2 in Appendix 3.

4.13 Based on growth in population and the change in per capita spending, total convenience goods spending within the study area is forecast to increase by +8.4% from £979 million in 2021 to £1,092 million in 2038, as shown in Table 3 (Appendix 2).

4.14 Comparison goods spending is forecast to increase by +63% between 2021 and 2038, increasing from £1,201 million in 2021 to £1,960 million in 2038, as shown in Table 3 (Appendix 3).

4.15 Food and beverage spending is forecast to increase by +58% between 2019 and 2038, increasing from £603 million in 2021 to £953 million in 2038, as shown in Table 3 (Appendix 4).

Growth in turnover densities

4.16 Experian's Retail Planner Briefing Note 18, October 2020 indicates comparison goods retail sales floorspace is expected to increase its average sales density by +4.5% in 2022, and further growth is envisaged in the medium term (+3.0% per annum during 2023 and 2027), and longer term (+2.6% per annum beyond 2027). These increases have been adopted and will absorb much of the future expenditure growth. These growth rates are relatively high compared with historic forecasts but are consistent with the likely high increase in on-line/home shopping through retail businesses i.e. the total sales of retail businesses will increase at a much higher rate than the amount of physical sales floorspace they provide. For convenience goods retail, Experian indicates a decline in sales densities during 2021 and 2022 and no predicted growth in sales densities thereafter.

4.17 Experian does not provide projections for food and beverage sales densities. Experian's projections suggest average food/beverage per person will be 23.9% lower in 2021 than in 2019, due to the impact of the Covid-19 crisis. Existing food/beverage facilities are expected to recover this lost expenditure and therefore a 31.4% growth in turnover is adopted between 2021 and 2023. An average growth rate of 0.5% per annum has been adopted thereafter.

Base year market shares

4.18 The turnover of facilities within LB Haringey is estimated based on the market shares or penetration rates. To assess the capacity for new floorspace, penetration rates were estimated for shopping and food/beverage facilities based on the household shopper survey undertaken in

July 2021. The market shares for convenience goods and comparison goods shopping are shown in Table 4 in Appendix 2 and Table 4 in Appendix 3 respectively. The market shares for food and beverage expenditure are shown in Table 4 in Appendix 4.

4.19 The household survey results suggest a high level (nearly 78%) of expenditure retention within the Borough for convenience goods shopping and an overall market share of 53% in the study area. The retention of comparison goods expenditure is much lower (under 54% in the Borough) due to the draw of larger centres outside the Borough, primarily in Barnet and Enfield and shopping trips to Central London. The overall market share in the study area is 40%. The retention of food/beverage expenditure is similar to comparison goods shop at just under 54% with high outflow to Central London. The overall market share in the study area is 38.5%.

4.20 The results of the household shopper survey relating to main and top-up food and grocery shopping have been used to estimate existing convenience goods shopping patterns. The market shares in Table 4 in Appendix 3 are a combined rate for both main and top up shopping based on a 70:30 split. This 70:30 split is based on Lichfields' experience and is widely accepted in retail studies of this kind. The survey results suggest reasonably high levels (over 70%) of convenience goods expenditure retention within the Borough (Zones 1 to 4), as shown in Table 4.1. These figures indicate that most Haringey residents tend to undertake their food and grocery shopping close to where they live albeit predominantly by car for main food shopping trips.

Table 4.1 Food and grocery trip retention in Haringey Borough Zones (% of all trips in zones)

Haringey Zone	Main (1st)	Main (other)	Top-up	**Combined market share**
Zone 1 - Haringey North West	71.3	82.5	91.4	**79.6**
Zone 2 - Haringey South West	72.3	68.2	81.4	**74.1**
Zone 3 - Haringey North East	84.9	77.5	88.2	**84.4**
Zone 4 - Haringey South East	70.0	69.9	82.6	**73.7**

Source: NEMS household survey results July 2021

4.21 The main food and grocery destinations in the Borough were as follows (combined % market share of all expenditure within the all study area zones):

1 Morrison's, Wood Green 5.1%;
2 Sainsbury's, Green Lanes 3.6%
3 Sainsbury's, Hornsey High Street 3.3%;
4 Lidl, Tottenham Hale Retail Park 3.2%
5 Sainsbury's, Northumberland Park 2.9%
6 Sainsbury's, Muswell Hill 2.6%;
7 Sainsbury's, Wood Green 2.4%;
8 Asda, Bruce Grove 2.1%;
9 Tesco, High Road, Tottenham 2.1%
10 Aldi, Bruce Grove 1.8%; and
11 Lidl, Wood Green 1.7%.

4.22 The market shares for comparison goods shopping in Table 4, Appendix 3 are based on a weighted average for each comparison goods category included within the household survey e.g. clothing/footwear, electrical, furniture, floorcoverings, DIY and health and beauty products. The

survey results suggest lower, but still reasonable levels of comparison goods expenditure retention for all goods categories within the Haringey zones, as shown in Table 4.2.

Table 4.2 Non-food comparison trip retention (% of all trips in Haringey Zones – excluding internet shopping)

Goods category	Zone 1 North West	Zone 2 South West	Zone 3 North East	Zone 4 South East
Clothing and footwear	52.2	32.6	58.9	52.2
Domestic electric appliances	55.8	31.2	73.1	63.0
Other electrical goods	55.9	28.0	74.2	61.2
Furniture, floor-coverings, household textiles	55.0	28.5	57.4	54.4
DIY / hardware and garden items	64.1	53.6	81.7	85.6
Health and beauty items	80.3	70.1	73.0	64.4
Books and stationery	77.8	83.0	67.9	70.1
Games, toys, sports, hobby items, pet products	64.9	56.6	71.1	67.1
Other non-food e.g. jewellery, glassware, household	47.9	49.0	48.4	46.2
Combined market share	**59.1**	**43.8**	**63.7**	**58.0**

Source: NEMS household survey results July 2021

4.23 The results suggest good levels of expenditure retention for lower order comparison goods, such as DIY/hardware, health/beauty and books/stationery, but lower levels of retention for higher order goods, such as clothes, electrical goods and furniture.

4.24 The results of the household shopper survey relating to eating and drinking away from the home have been used to estimate existing food and beverage expenditure patterns. The market shares in Table 4 in Appendix 4 are a combined rate for both eating out and drinking at pubs/bars are based on a 75:25 split. This 75:25 split is based on Lichfields' experience across the country. The survey results suggest reasonable levels of food/beverage expenditure retention in the west of the Borough, but lower levels in the east, as shown in Table 4.3.

Table 4.3 Food and beverage trip retention (% of all trips in zones)

Haringey Zone	Eating out	Drinking away from home	**Combined market share**
Zone 1 - Haringey North West	58.0	60.6	**58.7**
Zone 2 - Haringey South West	58.5	74.2	**62.4**
Zone 3 - Haringey North East	49.6	49.6	**49.6**
Zone 4 - Haringey South East	39.7	44.0	**40.8**

Source: NEMS household survey results July 2021

Capacity for convenience goods retail floorspace

4.25 Based on the market shares calculated from the household survey results, available convenience goods expenditure attracted to LB Haringey at 2021 is shown in Table 4 in Appendix 2. This has been projected forward to 2023, 2028, 2033 and 2038, and is summarised in Table 10 in Appendix 2. Convenience goods expenditure available to facilities within LB Haringey is expected to increase from £522.55 million in 2021 to £565.87 million in 2038. This increase is due to population growth, which offsets the slight reduction in average expenditure per person (excluding SFT). A breakdown for the four zones is set out in Table 4.4.

4.26 The benchmark turnover of food stores within the Borough is calculated in Table 10 in Appendix 2. The benchmark turnover is based on the sales area within each store and the respective company average sales densities. This turnover is not necessarily the actual turnover of the store, but it provides a useful benchmark to assess how well existing facilities are trading. The

combined benchmark turnover of all the main food stores and other convenience goods shops within the major, district and local centres is estimated to be £472.78 million, compared with the estimated actual turnover of £522.55 million. These estimates suggest convenience goods sales floorspace in the Borough is trading about 10% higher than the national average. However, it should be noted there are other small convenience goods shops not located within designated centres and therefore the benchmark turnover is likely to be an under-estimated. Nevertheless, convenience goods shopping facilities within the Borough appear to be trading satisfactorily.

Table 4.4 Convenience goods base year turnover at 2021

Zone	Turnover £M
North West Haringey	144.84
South West Haringey	139.39
North East Haringey	97.32
South East Haringey	141.01
Total	**522.55**

Source: Table 11 in Appendix 2.

4.27 Table 11 in Appendix 2 subtracts the turnover of existing floorspace from available expenditure to calculate the amount of surplus/deficit expenditure that may be available for new development in the future. There is a projected small convenience goods expenditure surplus of £6.02 million at 2023, due to population growth, which offsets the increase in home shopping (SFT), as shown in Table 11 in Appendix 2. This expenditure surplus is projected to increase to £14.75 million at 2028. Continued population growth creates a surplus of +£27.54 million by 2033, increasing to £43.32 million by 2038. These projections suggest there is emerging convenience goods retail capacity in the future. The surplus expenditure projections are converted into floorspace estimates Table 12 in Appendix 2 based on an average sales density of £12,000 per sq.m net, which is an approximate average for the main food store operators. The results are summarised in Table 4.5.

Table 4.5 Convenience goods floorspace capacity (sq.m gross) - cumulative

Zone	2023	2028	2033	2038
1 - North West Haringey	268	654	1,166	1,742
2 - South West Haringey	-57	-390	-304	58
3 - North East Haringey	296	857	1,300	1,650
4 - South East Haringey	210	635	1,118	1,707
Total	**717**	**1,755**	**3,279**	**5,157**

Source: Table 12, Appendix 2.

4.28 The surplus expenditure projections up to 2029 indicates an under supply of convenience goods floorspace in LB Haringey of 1,755 sq.m gross (1,229 sq.m net) at 2028 increasing to 5,157 sq.m gross (3,610 sq.m net) by 2038. The projections are lowest in zone 2 – Haringey South West due to the decline in projected population in this zone. Population is projected to reduce slightly in Haringey South West due the relatively low level of new residential development in this zone and the projected reduction in average household size.

4.29 The Haringey Retail Study 2013 predicted capacity for 15,904 sq.m gross of convenience goods retail floorspace up to 2031. The updated and rolled forward floorspace projection is lower due to lower expenditure growth and a higher proportion of home shopping expenditure.

4.30 Collectively main and local centres within LB Haringey have 391 convenience goods outlets including food stores operated by multiple retailers and smaller independent shops. Residents

across the LB Haringey have good access to a range and choice of food stores and there are no obvious areas of deficiency in food store provision.

4.31 Main shopping trips are generally made once a week or less often. The availability of a wide range of products and free car parking are important requirements for bulk food shopping trips. Large superstores, defined as over 2,500 sq.m net or more, are the usual destination for these types of shopping trip. There are three Sainsbury's superstores (over 2,500 sq.m net) in LB Haringey at Hornsey (in zone 2), Northumberland Park (zone 3) and Green Lanes (Zone 4). Other superstores in the Borough are Morrison's at Wood Green (zone 1) and Tesco at Tottenham High Road (zone 4). Tesco Extra at Glover Drive in Enfield is just outside the borough, but also serves the north east of LB Haringey.

4.32 In addition to these superstores, there is good choice of other large stores/supermarkets and smaller convenience stores within LB Haringey. There are 4 large food stores (1,000 to 2,000 sq.m net). The discount food sector is represented by Lidl stores at Wood Green (zone 1), Finsbury Park and Tottenham Hale Retail Park (zone 4); an Aldi store at Bruce Grove (zone 3) and a B&M Home store at Tottenham High Raid (zone 3).

4.33 There is a good selection of smaller convenience stores including 7 Tesco Express stores, 3 Sainsbury's Locals, 3 M&S Simply Food stores, 2 Asda stores, 2 Co-op stores, 2 Iceland stores and 2 Little Waitrose stores. In addition to these national multiple operators there is a wide choice of independent stores including ethic food specialists.

4.34 Convenience goods sales floorspace (48,219 sq.m net in total) is relatively evenly distributed throughout the Borough i.e. 24% in Zone 1 - North West; 25% in Zone 2 – South West; 21% in Zone 3 - North East; and 30% in Zone 4 – South East. There are no obvious areas of deficiency in food store provision in LB Haringey.

Capacity for comparison goods floorspace

4.35 Available comparison goods expenditure has been projected to 2023, 2028, 2033 and 2038 and is summarised in Table 11 in Appendix 3. Comparison goods expenditure available to facilities in LB Haringey is expected to increase from £481 million in 2021 to over £791 million by 2038. A breakdown for the four zones is set out in Table 4.6.

Table 4.6 Comparison goods base year turnover at 2021

Zone	Turnover £M
North West Haringey	189.45
South West Haringey	85.77
North East Haringey	34.32
South East Haringey	171.87
Total	**481.41**

Source: Table 11 in Appendix 3.

4.36 Comparison goods floorspace in the Borough is set out in Table 10 in Appendix 3. In total the net sales area is over 101,000 sq.m net. A high proportion of this sales floorspace is in Wood Green town centre (about 40% of the Borough total). There are also reasonable concentrations of comparison goods sales floorspace at Tottenham Hale Retail Park (15% of the total) and Arena Park (9%).

4.37 The average sales density of all comparison goods sale floorspace in the Borough is £4,720 per sq.m net. Based on Lichfields' experience, comparison goods sales floorspace within local authority areas can on average trade between £4,000 to above £7,000 per sq.m net. Haringey Borough has a reasonably high proportion (24%) of sales floorspace within retail parks, which

tend to trade at a lower density than high street shops. Overall, these figures suggest comparison good sales floorspace within the Borough is trading satisfactorily despite difficult current market conditions.

4.38 Table 11 in Appendix 3 subtracts the turnover of existing floorspace including an allowance for growth in turnover densities. The projections suggest future growth in available expenditure will be offset by expected growth in turnover densities up to and beyond 2033 i.e. existing retail businesses will absorb expenditure growth. This assumption is consistent with Experian's projected growth in non-store sales taken by retail businesses. The growth in retail operator's turnover densities will in part be fuelled by on-line sales and click and collect, which will not directly affect the need for additional retail sales floorspace. The deductions already made for SFT only relate to non-store sales through non-retail businesses.

4.39 By 2028 there is a projected expenditure deficit of -£15.06 million, which will reduce to -£5.52 million by 2033 but longer term expenditure growth will create a small surplus of £17.97 million by 2038. These projections suggest growth in turnover densities will absorb expenditure growth and there is likely to be an over-supply of comparison goods retail floorspace up to 2033. The deficit/surplus expenditure projections have been converted into floorspace estimates Table 11 in Appendix 3. The results are summarised in Table 4.7.

Table 4.7 Comparison goods floorspace capacity (sq.m gross) - cumulative

Zone	2023	2028	2033	2038
1 - North West Haringey	-455	-830	41	1,480
2 - South West Haringey	-530	-1,409	-1,394	-918
3 - North East Haringey	-24	37	261	525
4 - South East Haringey	-431	-682	163	1,576
Total	**-1,439**	**-2,884**	**-929**	**2,663**

Source: Table 11, Appendix 3.

4.40 The long term projection to 2038 suggests modest comparison goods retail floorspace capacity by 2038 at only 2,663 sq.m gross.

4.41 The Haringey Retail Study 2013 predicted capacity for 34,994 sq.m gross of comparison goods retail floorspace up to 2031. The main reasons for this significant difference are Experian's lower expenditure projections (including higher deductions for on-line shopping) and higher growth in turnover densities, resulting in less available expenditure for new floorspace.

4.42 Collectively main and local centres within LB Haringey have 435 comparison goods outlets including national retailers and independent shops. Shopping destinations within LB Haringey provide a good range and choice of comparison shops. Wood Green is the largest centre in terms of comparison goods floorspace and national multiples, but the Borough is also served by Enfield and Brent Cross. The five District Centres also have a reasonable provision of comparison goods outlets. The other local centres have a more limited comparison goods offer.

4.43 Comparison goods sales floorspace (101,997 sq.m net in total) is not as evenly distributed across the Borough as convenience goods retail, but customers are generally prepared to travel further for this type of shopping. Zone 1 - North West includes Wood Green Metropolitan Centre and this zone has 44% of the Borough comparison goods sales floorspace, but only 21% of the Borough's population. This demonstrates Wood Green serves all four zones in the Borough.

4.44 Zone 4 – Haringey South East also has a disproportionately high concentration with 32% of the Borough comparison goods sales floorspace, but only 26% of the Borough's population. This

concentrate is due to Arena Retail Park and Tottenham Hale Retail Park. These retail parks also have a brough wide catchment.

4.45 Overall, the accessibility for residents in LB Haringey to a range and choice of comparison goods shopping destinations is good.

Capacity for food/beverage floorspace

4.46 Available food and beverage expenditure has been projected forward to 2023, 2028, 2033 and 2038, and is summarised in Table 11 in Appendix 4. The amount of expenditure attracted to LB Haringey is expected to increase from £232 million in 2021 to over £362 million in 2038. A breakdown for the four zones is set out in Table 4.8.

4.47 There are 548 food/beverage outlets within the Borough's main and local centres, as shown in Table 10 in Appendix 4. The average turnover per outlet is about £420,000 in 2021, which based on Lichfields' experience is a relatively healthy average.

Table 4.8 Food/beverage base year turnover at 2021

Zone	Turnover £M
North West Haringey	57.44
South West Haringey	125.26
North East Haringey	11.72
South East Haringey	37.77
Total	**232.18**

Source: Table 11 in Appendix 4.

4.48 Table 11 in Appendix 4 subtracts the turnover of existing floorspace from available expenditure to calculate the amount of surplus expenditure available for new development. At 2023 there is a relatively large expenditure deficit of -£28.56 million assuming a recovery of turnover levels to pre-Covid levels in 2019. However, continued population and expenditure growth creates an expenditure surplus of £4.64 million at 2028 increasing to +£17.51 million by 2033 and +£34.06 million by 2038. Floorspace capacity projections are shown in Table 12 in Appendix 4 and summarised in Table 4.9 below.

Table 4.9 Food/beverage floorspace capacity (sq.m gross) - cumulative

Zone	2023	2028	2033	2038
1 - North West Haringey	-1,254	752	1,564	2,388
2 - South West Haringey	-3,299	-461	443	1,851
3 - North East Haringey	-232	232	421	584
4 - South East Haringey	-870	373	870	1,436
Total	**-5,656**	**896**	**3,298**	**6,258**

Source: Table 12, Appendix 4.

4.49 The small surplus expenditure projection up to 2028 indicates an under supply of food/beverage floorspace in LB Haringey of 896 sq.m gross, which will increase to 3,298 sq.m gross at 2033 and 6,258 sq.m gross at 2038.

4.50 Food/beverage outlets (548 in total) are distributed throughout the Borough, but there is an under-concentration in Zone 3 - North East with only 14.4% of the outlets compared with 29.5% of the Borough's population. The provision of restaurants and bar/bars serving the evening economy is strongest in the south west of the Borough in Crouch End and Muswell Hill. Other centres in the Borough have a good provision of takeaways and cafés rather than evening economy uses. There appears to be qualitative potential to improve evening economy related

food/beverage uses in the east of the Borough, based on the health check analysis of centres in this area as shown in Appendix 5.

Retail and food/beverage summary

4.51 The quantitative floorspace capacity projections suggest expenditure and population growth in the short to medium term (up to 2028) will be offset by the growth in home shopping and increases in sales densities. As a result, there is limited residual expenditure growth to support new floorspace. In the longer term, population/expenditure growth should provide opportunities for new floorspace, particularly convenience goods retail and food/beverage floorspace.

4.52 In qualitative terms, Haringey has a good choice of large food superstores, supermarkets and smaller convenience stores. There are no obvious areas of deficiency in food store provision. The main and local centres in the Borough have a mix of national retailers and independent shops that provide a good range and choice of comparison shops. The provision of restaurants and bar/bars serving the evening economy is strongest in the south west of the Borough but there is potential to improve the evening and night-time economy related to food/beverage uses in the east of the Borough.

4.53 The implications of the floorspace capacity projections and qualitative need assessment for future policy are addressed in Section 6.

5.0 Leisure, entertainment and cultural uses

Introduction

5.1 This section assesses the need for other main town centre uses including commercial leisure, entertainment and cultural uses i.e. cinema/multiplex, tenpin bowling, bingo, theatres, nightclubs and private health and fitness clubs. Main town centre uses, as defined within the NPPF glossary, exclude less intensive sports and recreation uses such as swimming pools, sports halls and sports pitches, and therefore the need for these uses has not been assessed in this study. Residents in LB Haringey have a relatively good range of commercial leisure and entertainment uses within the authority area and within neighbouring boroughs and in Central London.

5.2 The demand for office uses (now included in the new Use Class E) needs to be assessed in the context of the wider need for Class B employment uses. The need for office uses has been assessed in the Employment Land and Economy and Employment Space Study prepared by Stantec.

Leisure and cultural expenditure

5.3 Experian local expenditure data for the Haringey study area, as shown in Appendix 1, indicates the resident population generated £165 million in 2019 (an average of about £350 person) on selected cultural, recreational and sporting services, broken down as follows:

- cinema admissions £13.15 million;
- live entertainment i.e. theatre/concerts/shows £34.75 million;
- museums, theme parks, houses and gardens £13.82 million;
- admissions to clubs, dances, discos, bingo £6.84 million;
- other miscellaneous entertainment £14.38 million;
- subscriptions to sports, social clubs and leisure £45.18 million; and
- leisure class fees £36.90 million.

5.4 Not all leisure/cultural spend from residents will be spent in the Borough. The household survey results have been used to estimate the household participation rates and the retention for leisure trips within the study area, as shown in Table 5.1.

Table 5.1 Leisure participation and trip retention (% of households in the study area)

Leisure activity	% households participating	% trips attracted to LB Haringey
Cinema	49.4	51.4
Theatre	39.2	1.9
Nightclubs/live music venues	19.4	9.9
Bingo	3.7	57.6
Gyms/health and fitness club	32.2	63.0
Tenpin bowling/ gaming	19.7	33.9
Trampoline park	16.1	0.0
Museums and art galleries	45.9	0.9

Source: NEMS household survey results July 2021

5.5 The participation and retention rates varies significantly for each activity. Less than 16.5% of households do not participate in any of the eight leisure activities explored by the household

survey. Many residents travel outside the study area e.g. to Central London for some leisure activities, particularly trips to theatres, museums and art galleries. The retention rate is highest for trips to cinemas, bingo halls and health/fitness clubs.

5.6 Taking these leisure trip retention rates into account and the split of cultural/entertainment expenditure shown above, it is reasonable to assume Haringey Borough attracts about 40% of resident's total leisure expenditure within the study area, which based on Lichfields' experience is a reasonable assumption for a London Borough. Based on this estimated 40% market share, attracted leisure expenditure at 2019 is about £66 million.

Leisure/cultural floorspace capacity

5.7 Experian's expenditure projections suggest leisure expenditure per person should increase in real terms by +1.7% between 2019 to 2028, or +6.3% between 2019 to 2033 and by +11.2% between 2019 to 2038, which will generate an additional +£1.1 million for these activities from the resident population at 2028 increasing to +£4.2 million by 2033 or £7.4 million by 2038.

5.8 With population growth (+5.7% by 2028, +8.5% by 2033 or +11.5% by 2038) retained expenditure (40%) on these leisure/cultural activities should increase from about £66 million in 2019 to £70.9 million by 2028, £76.1 million by 2033 and then £81.8 million by 2038, an additional £4.9 million by 2028, £10.1 million by 2033 or £15.8 million by 2038 (+23.9%).

5.9 Based on Lichfields experience, leisure floorspace normally trades on average around £2,000 per sq.m gross. If leisure/cultural expenditure attracted to LB Haringey increased by £4.9 million in 2028 and then to £10.1 million and £15.8 million, as indicated above, then this additional expenditure could support about 2,500 sq.m gross of new commercial leisure and cultural floorspace by 2028, based on an assigned average of £2,000 per sq.m, increasing to 5,000 sq.m gross by 2033 and 7,900 sq.m gross by 2038. The potential distribution of new floorspace is shown in Table 5.2, based on projected population within each zone.

Table 5.2 Commercial leisure and cultural floorspace capacity (sq.m gross) - cumulative

Zone	2028	2033	2038
1 - North West Haringey	500	1,100	1,700
2 - South West Haringey	500	1,000	1,600
3 - North East Haringey	800	1,600	2,500
4 - South East Haringey	700	1,300	2,100
Total	**2,500**	**5,000**	**7,900**

5.10 This analysis provides a broad brush global floorspace capacity analysis. A more detailed sector by sector assessment is set out in the remainder of this section.

Cinemas

5.11 Cinema admissions in the UK declined steadily during the 1950s, 1960s and 1970s, a period when the ownership of televisions increased significantly. Cinema admissions continued to decline in the early 1980s but increased steadily after 1984 up to 2002. There was a peak in cinema admissions in 2002 at 175.9 million. Total admissions reduced to 157.5 million in 2014 but increased slowly to 17 million in 2019 (Source: British Film Institute). Cinema trips have not increased significantly since 2002, despite population growth of 9.6% during this period (59.4 million to 66.6 million). The national average (pre-Covid) visitation rate was about 2.6 trips per person per annum, with average box office receipts of over £7 per trip. The BFI indicate the London average is higher at 3 trips per person. The number of trips during the on-going Covid-19 crisis will have reduced significantly. This cinema assessment assumes trip levels will return to pre-Covid levels in the future.

5.12 The Cinema Advertising Association identities 771 cinema facilities with 4,115 screens. Lichfields' national CINeSCOPE model identifies approximately 800,000 cinema seats in the UK. The CINeSCOPE model assesses the provision of cinema screens/seats against projected customer cinema trips across the country, to identify areas of under and over-provision. The national average is about 40,000 cinema trips per annum for each cinema or 220 trips per annum for each seat available.

5.13 Cinema provision in Haringey is 30 screens with 4,922 seats, as follows:

1	ArtHouse, Tottenham Lane, N8 9BT	(2 screens / 174 seats);
2	Picturehouse, Tottenham Lane, N8 9BY	(5 screens / 604 seats);
3	Everyman, Fortis Green, N10 3HP	(5 screens / 470 seats);
4	Cineworld, Wood Green Shopping City,	(12 screens / 1,932 seats); and
5	Vue, Hollywood Green, High Road	(6 screens / 1,742 seats).

5.14 The 2021 population within the study area (including the four zones beyond the Borough boundary) is 476,314, which generates approximately 1,428,942 cinema trips in total, assuming the London average 3 trips per person. The household survey results indicate over 49% of households visit cinemas. The survey results also suggest Haringey Borough attracted 51.4% of cinema trips in the study area equating to 734,476 cinema trips in 2021, based on pre-Covid visitation rates.

5.15 Experian's local expenditure data indicates the study area generates £13.15 million on cinema trips. This expenditure estimate appears to be higher than 734,476 cinema trips estimated above i.e. it implies an average of over £17 per person each trip. This figure suggests that the cinema visitation rate in Haringey is higher than the London national average (3 trips per annum per person).

5.16 The population within the study area is projected to increase to 525,095 by 2038, generating 1,575,285 cinema trips in total, again based on the London average visitation rate. If Haringey Borough continues to attract 51.4% of these trips then 809,696 cinema trips will be made to facilities in Haringey Borough at 2038.

5.17 Adopting the national average trips per cinema screen (40,000 trips per screen), implies that 809,696 cinema trips would generate demand for 20.2 cinema screens. In terms of seats, the national average (220 trips per seat) suggests 701,737 trips could support 3,680 seats. These projections suggest an over-supply of 9.8 screens or 1,242 seats at 2038, based on the London average visitation rates.

5.18 These projections suggest that there is limited theoretical capacity for a further cinema provision within Haringey Borough over the plan period. The presence of four multiplex cinemas in the Borough may limit operator demand for an additional facility particularly in the short term up to 2023. Furthermore, the longer-term impact of the Covid-19 on the number of cinema trips may reduce this theoretical capacity.

Theatres, nightclubs, live music and other cultural activities

5.19 The household survey results indicate nearly 40% of respondents in the study area visit theatres; 20% visit nightclubs/live music venues and 46% visit museums/art galleries.

5.20 The UK Theatre and Society of London Theatres (SOLT) indicated their member organisations (223) presented nearly 63,000 performances attracting over 34.35 million tickets visits, generating ticket revenue of £1.28 billion in 2018 (pre-Covid). The average ticket revenue per venue is £5.7 million. The UK average attendance per performance is 545.

5.21 The household survey results indicate the participation rate for theatres is reasonably high (40%). The main destinations for households participating are primarily in Central London. The main destinations local to Haringey were:

- Park Theatre, Finsbury Park 4%;
- Millfield Theatre, Edmonton 1%;
- Almeida Theatre, Islington 1%;

5.22 All other destinations attracted less than 1% of participating households.

5.23 Haringey Borough's market share of all theatre trips generated by the study area resident population is less than 2%. Experian's local expenditure data indicates the study area generates £34.75 million on live theatre, concerts and shows. Based on the average ticket revenue per venue (£5.7 million) the study area population generates theoretical demand for 6 venues. However, the household survey results suggest a very small proportion of theatre trips are retained in the Borough, due to the significant provision in Central London.

5.24 The nightclub sector has struggled in recent years. IBISWorld (providers of global industry research) suggests these venues have lost their competitive advantage over pubs or bars, with lower prices and a more relaxed atmosphere. Approximately one-quarter of nightclubs have closed in the past decade as operators have struggled to respond to new challenges from regulation, licensing, planning, business rates and policing.

5.25 The household survey results indicate the participation rate for nightclub venues is relatively low (20%) and most residents in the study area visit nightclub venues in Central London. Haringey Borough's market share of participating households in the study area is only 9.9%.

5.26 The household survey results indicate the participation rate for museums/art galleries is reasonably high (46%). Many destinations were mentioned by households participating in this activity, primarily in Central London. Haringey Borough's market share of participating households in the study area was less than 1%. The main destinations were:

- British Museum London 16%;
- Tate Modern London 12%; and
- Natural History Museum London 10%.

5.27 Experian's local expenditure data indicates the study area generates £13.82 million on museums, theme parks, houses and garden. Leisure expenditure is projected to increase by about 24% by 2038. Expenditure growth attracted from the indigenous population based on the existing market share (1%) is likely to be relatively small (less than £0.2 million). However, if Haringey can increase its market share, reducing the leakage of trips from the local aera, then the potential for growth will be more significant.

5.28 Based on existing market shares, there is no clear qualitative or quantitative need for additional theatre, music/nightclub or cultural provision in Haringey Borough. However, there is potential to increase the Borough's market share and attract more demand from visitors if provision is improved. The development strategy needs to be flexible to respond to emerging opportunities for attractive new facilities of this kind.

Health and fitness clubs

5.29 The 2019 State of the UK Fitness Industry Report revealed that the UK health and fitness industry was continuing to grow pre-Covid. In 2019 there were more than 10 million fitness members in the UK and the industry was worth £5 billion, with a participation rate of 15.6%. The sector has more clubs, more members and a greater market value than ever before. The

2019 report highlighted that the industry experienced growth over the twelve-month period to the end of March 2019, with an increase of 4.7% in the number of memberships and 2.9% growth in the number of facilities.

5.30 The Sport England/Active Places data indicates that there are 32 registered health and fitness facilities in Haringey, with 2,258 fitness stations as shown in Table 5.3. Most of these (78% of fitness stations) are registered membership facilities, although five facilities provide over 300 fitness stations open to the general public (pay and play).

Table 5.3 Haringey health and fitness facilities (Active Places, June 2021)

Name	Type	No. Fitness Stations
Alexandra Park School	Private Use	16
Bodyworks Gym	Registered Membership	170
Broadwater Farm Community Centre	Pay and Play	22
Channing School	Private Use	17
Conel (Tottenham Centre)	Private Use	13
Coolhurst Lawn Tennis and Squash Rackets Club	Sports club/community assoc.	14
Finsbury Park – Track and Gym	Pay and Play	12
Fitness First (Haringey)	Registered Membership	70
Fortismere School	Private Use	12
Gladesmore Sports Centre	Private Use	16
Greig City Academy	Private Use	17
Haringey Sixth Form College	Private Use	20
Highgate School (Mallinson Sports Centre)	Registered Membership	18
Hornsey School for Girls	Private Use	5
Laboratory Spa and Health Club (Muswell Hill)	Registered Membership	93
Legends Gym (Haringey)	Registered Membership	90
Manor Health and Leisure Club (Muswell Hill)	Registered Membership	50
New River Sport and Fitness	Pay and Play	30
Park Road Pools and Fitness	Registered Membership	80
Pure Gym (London Muswell Hill)	Registered Membership	220
St Thomas More Catholic School	Private Use	26
The Gym (Tottenham Hale)	Registered Membership	134
The Gym (Tottenham High Road)	Registered Membership	170
The Gym (Tottenham White Hart Lane)	Registered Membership	170
The Gym (Wood Green Lordship Lane)	Registered Membership	170
The Gym (Wood Green The Mall)	Registered Membership	170
Tottenham Community Sports Centre	Sports club/community assoc.	17
Tottenham Green Pools and Fitness	Pay and Play	50
Virgin Active Club (Crouch End)	Registered Membership	120
Woodside High School	Sports club/community assoc.	8
YMCA North London (Haringey)	Registered Membership	38
Zone Gym (Wood Green Gym)	Registered Membership	200
Total		**2,258**

5.31 Greater London has 1,131 Sport England registered health and fitness facilities with 77,914 fitness stations (average of 69 stations per facility). This existing provision equates to about 8.6 registered fitness stations per 1,000 people in Greater London in 2021. As indicated above, the

2021 study area population (including zones beyond the Borough boundary) is 476,314, which based on the Greater London average could support 4,096 fitness stations.

5.32 The household survey results indicate over 32% of households visit health and fitness gyms. The survey results also suggest Haringey Borough attracted 63% of gym trips in the study area equating to a catchment population of just over 300,000 in 2021. This Haringey Borough catchment population (300,000) suggests an average of 7.5 fitness stations per 1,000 people in 2021, which is marginally below the Greater London average (8.6 fitness stations per 1,000 people). These figures suggest a current under-supply of 322 fitness stations, if participation rates in Haringey were the same as Greater London.

5.33 The population within the study area is projected to increase to 525,095 by 2038. Haringey Borough's catchment population for gyms should increase to 330,800 by 2038. The additional 30,800 catchment population between 2021 to 2038 could support an additional 230 to 265 fitness station by 2038, based on the Haringey and Greater London averages. This range could be a reasonable minimum requirement for new gym facilities (2 to 3 medium/large facilities) in the Borough over the plan period.

5.34 Demand for additional facilities within Haringey should arise from future population growth and/or increased participation rates. As indicated above, the study area population generates £32.2 million on subscriptions to sports and social clubs. Haringey's share of this expenditure is £20.3 million (63%), which equates to about £9,000 per fitness station.

5.35 Experian's medium and long term expenditure projections suggest leisure expenditure per person should increase in real terms by 11.2% between 2019 to 2038, which is likely to include an increase in participation rates. With population growth (+11.5%), leisure expenditure on this activity in attracted to Haringey Borough should increase from £20.3 million to £25.2 million by 2038, an additional +£4.9 million. Based on £9,000 per fitness station, this additional expenditure could support 544 new fitness stations by 2038, about 5 medium/large facilities. This could be a reasonable maximum requirement for new gym facilities in the Borough over the plan period.

Tenpin bowling and other indoor leisure innovations

5.36 As indicated in Section 2, freed-up space in town centres has provided new opportunities for leisure uses. Vacated premises have been reconfigured and reused for trampolines, climbing, indoor golf, escape rooms etc. These and other innovations are likely to continue in the future because landlords will adopt a flexible approach to respond to arising opportunities.

5.37 There is a tenpin bowling/family entertainment facility at Finsbury Park i.e. Rowans Bowling with 22 lanes. The nearest other facility is Hollywood Bowl at Finchley with 26 lanes. A climbing facility, Stronghold Bouldering Centre, is located at Tottenham Hale.

5.38 The household survey results suggest the tenpin bowling participation rate is about 20% of households. The market share of the existing facility at Finsbury Park is 33.9%, whilst the Hollywood Bowl attracts 47.6%.

5.39 The theoretical population to support these two facilities (48 lanes) is 576,000 people, based on one lane per 12,000 people (national average). These two facilities currently serve several Borough's i.e. Enfield, Haringey, Hackney, Islington and Barnet, an area extended beyond the Haringey study area.

5.40 The projected population of Haringey Borough alone at 2038 (295,932) could support 25 lanes, although this potential will be partly met by the facility at Finsbury Park. Nevertheless, tenpin

bowling provision is relatively limited across the north London Boroughs. The north or north east of Haringey Borough appears to be the most obvious area of deficiency.

5.41 Indoor trampoline centres are a relatively new leisure activity in the UK. In America outdoor trampoline centres were popular in the late 1950s and 1960s. This format first seen in America has been adopted and modernised and is now becoming a popular indoor leisure activity for a variety of age groups in the UK. The UK's first indoor trampoline centre was opened by Bounce in 2014.

5.42 Trampoline centres offer a new, recreational experience for both children and adults. They typically have over 100 interconnected trampolines on site, consisting of differing courts including a Main Arena, Dodgeball Court, Kids Court, Slam Dunk Area, Foam Pit, Airbag Jump, Touch Walls, Gladiator Pits and Tumble Tracks, as well as an arcade and party rooms.

5.43 Facilities have emerged in London. Trampoline destinations mentioned by households participating in this activity were:

- Better Extreme, Islington;
- Flipout, Staples Corner Retail Park, Brent Cross;
- Jump in Trampoline Park, Enfield;
- Oxygen Freejumping, O2 Greenwich;
- Zapspace, Stratford; and
- Sobell Leisure Centre, Hornsey Road, Islington.

5.44 There is a potential scope for further provision in Haringey Borough, but this sector is still relatively new and its potential for continued growth is unclear. Haringey's strategy should be flexible to respond to any emerging demand for a trampoline centre, this could include repurposed large spaces vacated within town centres.

Bingo, games of chance and gambling

5.45 Gala (now Buzz Bingo) and Mecca are the main bingo operators, controlling over half of the UK market. Marketing of the bingo sector has been more proactive in recent years and Gala and Mecca have invested in premises, moving out of dated premises (i.e. converted cinemas) into purpose-built units. Bingo clubs have become increasingly sophisticated and have actively sought to attract all age groups. The bingo sector usually prefers central locations that are accessible by public transport and by foot. However, the significant increase in on-line gambling has, and will continue to affect this sector.

5.46 The Gambling Commission indicates there are 646 bingo facilities in Great Britain (2020) and 156 casinos. This equates to approximately one bingo facility per 75,000 adults, and one casino per 330,000 adults.

5.47 The household survey results suggest the bingo participation rate is less than 4% of households, which is lower than the national average participation rates is around 5%. However, Haringey Borough's market share of bingo trips in the study area is relatively high at 57.6%. The adult population (about 366,000 in 2021) in the Haringey study area (assuming a market share of 57.6%) is theoretically capable of supporting 2.8 bingo facilities and 0.6 casinos, based on the national averages.

5.48 Mecca Bingo in Wood Green is the only major bingo hall in the Borough, although residents also have access to Buzz Bingo in Enfield. There is theoretical scope for an additional bingo facility in Haringey Borough, but the presence of existing facilities and relatively low participation rates

may limit operator demand. The growth in on-line gambling is also likely to reduce demand for bingo halls.

Commercial leisure uses summary

5.49 The leisure, entertainment and cultural sectors are fragmented and innovative. In addition to the main leisure and entertainment uses outlined above, there are many other activities that could be promoted e.g. nightclubs, museums, art galleries, exhibition space, tourist attractions and new emerging leisure activities such as escape rooms and virtual golf centres. The representation of these emerging uses is relatively limited in Haringey Borough. Given the fragmented nature of these sectors it is difficult to precisely quantify the potential demand for these uses over the next 15 years.

5.50 In global terms future expenditure growth could support about 5,000 sq.m of new commercial leisure and cultural floorspace in Haringey Borough by 2033, increasing to 7,900 sq.m by 2038. This additional floorspace could include:

1 3 to 5 additional medium sized health and fitness facilities (about 500 new fitness stations); and

2 a ten pin bowling facility;

3 a trampoline centre, bingo hall and other new leisure innovations e.g. indoor climbing, escape rooms, virtual sport activities.

5.51 Along with the projected need for additional food/beverage floorspace outlined in Section 4, the potential for new commercial leisure and cultural uses provides an opportunity to enhance the evening and night-time economy within the main centres in the Borough. The development strategy should to be flexible to respond to emerging opportunities for new leisure, entertainment and tourist related facilities.

6.0 Implications for planning policy

Accommodating growth and change

6.1 For planning policies, local authorities are still required to support the role of town centres and the three main areas policies should focus on:

1 defining a network and hierarchy of centres, allowing then to grow and diversify;

2 defining the extent of centre boundaries and primary shopping areas, making clear the uses permitted in these locations; and

3 allocating a range of suitable sites to meet the scale and type of development needed for at least 10 years ahead, sites should be allocated consistent with the sequential approach i.e. town centre, then edge-of-centre followed by accessible out-of-centre sites.

6.2 The NPPF acknowledges the rapid changes that are affecting town centres. It recognises that diversification is key to the long-term vitality and viability of town centres, including the need for residential development. Accordingly, planning policies should clarify the range of uses permitted in such locations, as part of a positive strategy for the future of each centre. However, as indicated in Section 2, the recent changes to the UCO and PDR significantly restrict the Council's ability to control the mix of uses within centres through a plan-led approach.

6.3 The importance of a mix of retail and other town centre activity has increased in recent years and town centres increasingly need to compete with on-line shopping. Town centres need a better mix of uses that extend activity throughout the daytime and into the evenings.

6.4 The NPPF's presumption in favour of sustainable development remains. For plan-making this means that plans should positively seek opportunities to meet the development needs of their area and be sufficiently flexible to adapt to rapid change. It is widely accepted that very long-term projections have inherent uncertainties. In response to these uncertainties, local planning authorities are no longer required to allocate sites to meet the need for town centre uses over the full plan period. The need for new town centre uses over a minimum ten-year period reflects the complexities in bringing forward town centre development sites. In line with the Government's economic growth agenda, a positive approach to meeting community needs is still required.

6.5 The London Plan 2021 Policy E9: Retail, Markets and Hot Food Takeaways indicates borough development plans should identify future requirements and locations for new retail development. Plans should also identify areas for consolidation of retail space where there is a surplus.

6.6 Applications for retail and town centre uses that are not in an existing centre and are not in accordance with an up-to-date Local Plan will be assessed against the sequential and impact tests.

6.7 The sequential test in the NPPF indicates main town centre uses should locate in town centres, then in edge of centre locations; and only if suitable sites are not available (or expected to become available within a reasonable period) should out of centre sites be considered (para. 87). When considering edge of centre and out of centre proposals, preference should be given to accessible sites which are well connected to the town centre. Applicants and local planning authorities should demonstrate flexibility on issues such as format and scale, so that opportunities to utilise suitable town centre or edge of centre sites are fully explored (para. 88).

6.8 The NPPF states that local planning authorities should require an impact assessment for applications for retail and leisure development outside of town centres, which are not in accordance with an up-to-date development plan and are over a proportionate, locally set

floorspace threshold. If there is not a locally set threshold, the default threshold is 2,500 sq.m (para. 90). Where an application fails to satisfy the sequential test or is likely to have a significant adverse impact, it should be refused (para. 91).

6.9 The appropriate balance between retail and other town centre activity has been debated in recent years, as town centres increasingly need to compete with on-line shopping. On-line shopping is likely to grow faster than previously expected due to shifts in customer behaviour accelerated by the Covid-19 crisis. The need for a better mix of uses within town centres will become increasingly important. A broader mix of uses should extend activity throughout the daytime and into the evenings.

6.10 As set out in Section 2, the Use Classes Order (UCO) was significantly amended in September 2020 and changes to permitted development rights were introduced in August 2021. These changes will have significant implications for shop frontage planning policies, restricting the ability of local planning authorities to control the mix of uses.

6.11 The expenditure projections in this update take account of home shopping made through non-retail businesses, because special forms of trading (sales via the internet, mail order, stalls and markets) have been excluded. The study update adopts Experian's latest information and projections and assumes that special forms of trading will increase in the future, including the growth of internet shopping.

Floorspace capacity projections

6.12 The assessment of the potential for new retail, food/beverage floorspace within the previous sections suggests there is modest long-term scope for new development within LB Haringey. Tables 6.1, 6.2 and 6.3 below summarise the floorspace requirements in LB Haringey up to 2028, 2033 and 2038 (cumulative).

6.13 These projections assume LB Haringey can maintain its market share of expenditure in the future. This approach recognises that additional development within Borough could help to increase the area's market share, but this increase will be counter-balanced by development within competing centres. A balanced and sustainable approach has been adopted.

6.14 Table 6.1 indicates there is a small combined projected over-supply of 232 sq.m gross of retail and food/beverage floorspace at 2028. By 2033 there is a global under-supply of 5,648 sq.m gross. However, the availability of existing vacant floorspace needs to be considered.

6.15 Development plans should identify the scale of need for main town centre uses and assess whether the need can be met on town centre sites or through the expansion of centres. The NPPF indicates that local plans should allocate a range of suitable sites to meet the scale and type of retail, leisure and other development needed in town centres for at least 10 years. In this case projections beyond 2033 may need to be considered allowing time for future policy to be formulated and adopted. To accommodate growth, local planning authorities should keep town centre boundaries under review.

6.16 The floorspace projections should not be adopted as rigid targets or maximum or minimum requirements but viewed as broad guidance. The floorspace projections in this report provide a starting point for the review of site-specific allocations and development management policies.

Table 6.1 Summary of retail and food/beverage floorspace requirements up to 2028 (sq.m gross)

Zone	Convenience retail (sq.m gross)	Comparison retail (sq.m gross)	Food/ beverage (sq.m gross)	Total (sq.m gross)
1 - North West Haringey	654	-830	752	576
2 - South West Haringey	-390	-1,409	-461	-2,260
3 - North East Haringey	857	37	232	1,126
4 - South East Haringey	635	-682	373	326
Total	**1,755**	**-2,884**	**896**	**-232**

Table 6.2 Summary of retail and food/beverage floorspace requirements up to 2033 (sq.m gross)

Zone	Convenience retail (sq.m gross)	Comparison retail (sq.m gross)	Food/ beverage (sq.m gross)	Total (sq.m gross)
1 - North West Haringey	1,166	41	1,564	2,771
2 - South West Haringey	-304	-1,394	443	-1,255
3 - North East Haringey	1,300	261	421	1,982
4 - South East Haringey	1,118	163	870	2,151
Total	**3,279**	**-929**	**3,298**	**5,648**

Table 6.3 Summary of retail and food/beverage floorspace requirements up to 2038 (sq.m gross)

Zone	Convenience retail (sq.m gross)	Comparison retail (sq.m gross)	Food/ beverage (sq.m gross)	Total (sq.m gross)
1 - North West Haringey	1,742	1,480	2,388	5,610
2 - South West Haringey	58	-918	1,851	991
3 - North East Haringey	1,650	525	584	2,759
4 - South East Haringey	1,707	1,576	1,436	4,719
Total	**5,157**	**2,663**	**6,258**	**14,079**

Source: Tables 11 in Appendix 2, 3 and 4.

6.17 Policy SP10 of the Haringey Local Plan Strategic Policies (including alterations since 2017) indicates the scale of retail growth required in the Borough up to 2026. The New Local Plan could include a policy or supporting text that updates and roll forward these floorspace projections. The New Local Plan should seek to identify and accommodate growth for at least 10 years. Given the uncertainties relating to very long term projections, the New Local Plan could address floorspace projections up to 2033 rather than 2038. Future policy/supporting should refer to the following floorspace projections up to 2033 and should continue to promote and encourage the provision of retail and other main town centre uses:

- Convenience goods retail 3,300 sq.m gross
- Food/beverage uses 3,300 sq.m gross
- Commercial leisure, entertainment and culture 5,000 sq.m gross
- **Total** **11,600 sq.m gross**

6.18 Growth in the food/beverage and commercial leisure, entertainment and culture sectors provides an opportunity to enhance the evening and night-time economy in the main centres in the Borough. The New Local Plan should recognise and foster this potential.

The need for office accommodation

6.19 The Employment Land Study prepared by Stantec in 2021 includes an office market analysis. Stantec indicate that this market is fragmented across the Borough and smaller than the industrial market. Four broad office market sub areas are identified focused around Wood

Green, Harringay (including Green Lanes), Tottenham in the north east of the Borough and South Tottenham (including Tottenham Hale, Bruce Grove/Tottenham High Road and West Green Road/Seven Sisters. There is a small concentration of purpose-built offices in Tottenham and Wood Green, but overall, the office market is "quite small". The ELS suggest there are small pockets of offices found outside the sub areas, for example around Muswell Hill and Crouch End, but the market here is too small to allow for any meaningful analysis.

6.20 The ELS indicates it is still too early to tell what the future of the office market will look like post Covid, with the continued trend of working from home. The outer London market is relatively smaller than the central London market and demand for office space in Haringey Borough is from a range of occupiers, predominantly seeking affordable space, servicing the local market and/or seeking the benefits of the public transport access provided in Tottenham.

6.21 The ELS identifies a need for between 35,000 to 40,000 sq.m of office accommodation over the next 15 years, the equivalent to adding one third to the total office stock. However, a conclusion from the property market assessment is that new build offices are not currently viable to deliver on their own. But should the office market improve, the regeneration areas in Wood Green and Tottenham are potential locations for new development.

6.22 If correct, these need projections suggest there may be potential to provide new office development within the main centres in the Borough and the repurposing of retail floorspace for office use.

Vacant shop premises

6.23 The existing stock of premises should have a role to play in accommodating any projected growth. The need assessment in this report assumes that existing retail and service floorspace can, on average, increase its turnover to sales floorspace densities. In addition to the growth in sales densities, vacant shop premises could help to accommodate future growth.

6.24 Based on LDC data for the main centres in 2020 and Lichfields' survey of local centres in 2021, there were 279 vacant shop units within Haringey's main and local centres, an average vacancy rate of 10.6%, which is slightly below lower than the UK pre-Covid-19 average (12.4%). However, the Council's more recent survey in the main centres in September 2021, suggests the number of vacant shop units may have decreased by 55 units since 2020. Based on an average of 80 sq.m gross per unit, the total amount of vacant floorspace in the main and local centres could be about 18,000 sq.m gross. It is reasonable to assume the number of vacant units could reduce by a third, i.e. to a lower vacancy rate of around 6%. This reduction in the shop vacancy rate could accommodate about 6,000 sq.m of new uses, which could meet most of the projected convenience goods retail and food/beverage floorspace capacity up to 2033 (6,600 sq.m gross), excluding any allowance for additional vacated floorspace released through the closure of comparison retail uses (estimated to be about 900 sq.m gross at 2033).

6.25 The short to medium term projections and shop vacancy rates suggest there is no quantitative need to increase the combined amount of retail and food/beverage floorspace in LB Haringey up to and beyond 2028. However, there is likely to be a shift from comparison goods retail space to convenience goods retail, food/beverage and leisure/cultural uses, with some vacant shop premises also converting to these uses. Not all vacant shop units will be suitable for conversion to leisure/cultural uses, therefore new development may be required to accommodate some new uses.

6.26 Based on recent experience, demand for town centre premises will require a mix of unit sizes. In general, national multiple retail, food/beverage and leisure operators require larger premises of a least 200 sq.m gross. Smaller independent SMEs tend to require smaller premises of under 100 sq.m gross. It is difficult to predict the precise mix of unit sizes that will be required in the

long-term, therefore a flexible approach is required that can respond to changes in market demand.

6.27 Future planning policy within the New Local Plan should seek to ensure new mixed use developments are flexible particularly at ground floor level. It is not necessary or appropriate for planning policies to provide minimum or maximum units sizes because this will vary significantly for different uses and will change over time. However, the design and configuration of buildings should allow for the merger and sub-division of units (though the provision or removal of partition walls), offering maximum flexibility to respond to changing operator requirements over the plan period.

6.28 The recent changes to the Use Classes Order and permitted development rights, as described in Section 2, will provide more flexibility for landowners to change the use of retail premises to other town centre uses and residential and restrict LB Haringey's ability to control the mix of uses in the future.

6.29 The capacity projections in this update suggest there is no pressing requirement to allocate sites for major retail development in order to accommodate projected growth over the next 10 years. The priority in the short to medium term will be the reoccupation of vacant shop units, potentially for non-retail uses including food/beverage outlets, leisure, entertainment and cultural uses. Based on a reasonable reduction in vacancy rates, vacant floorspace could theoretically accommodate the need for all new town centre uses up to 2033.

6.30 The future strategy should be flexible to respond to new investment that cannot be accommodated in vacant units. Some redevelopment, refurbishment and expansion may be required in addition to the reoccupation of vacant units, ideally within town centres to accommodate future investment opportunities.

6.31 The long-term development strategy for the four zones within the Borough is set out below.

North West Haringey (Zone 1)

6.32 Wood Green Metropolitan Centre is in Zone 1, but also serves other zones. Zone 1 has a good provision of existing retail, food/beverage and leisure facilities. The retail and food/beverage floorspace projections for North West Haringey at 2033 is about 2,800 sq.m gross, increasing to 5,600 sq.m gross by 2038. The additional requirement for commercial leisure/cultural floorspace could be 1,100 sq.m by 2033 increasing to 1,700 sq.m by 2038. The total combined requirement at 2038 (cumulative) is about 7,300 sq.m gross as shown in Table 6.1. Over 56% of this floorspace requirement relates to food/beverage, leisure, entertainment and cultural uses, which could enhance the night-time economy in Wood Green.

6.33 There are 87 vacant shop units in Zone 1 and the shop vacancy rate is 10.3%. If the vacancy rate reduced to 7% then reoccupied floorspace in this zone could be about 2,200 sq.m gross, which is nearly 80% of the retail and food/beverage floorspace projection to 2033, and 39% of the long-term projection to 2038.

Table 6.2 Combined retail, food/beverage, leisure and cultural floorspace requirements for Zone 1 (sq.m gross)

Zone	Convenience retail (sq.m gross)	Comparison retail (sq.m gross)	Food/ beverage (sq.m gross)	Leisure/ cultural (sq.m gross)	Total (sq.m gross)
By 2033	1,200	0	1,600	1,100	3,900
By 2038	1,700	1,500	2,400	1,700	7,300

6.34 Allowing for this reoccupation of vacant floorspace, there could be a residual requirement for about 600 sq.m gross at 2033 increasing to 3,400 sq.m gross by 2038. The residual

requirement including commercial leisure/cultural floorspace could be 1,700 sq.m gross by 2033 increasing to 5,100 sq.m gross by 2038.

6.35 The Haringey Site Allocations DPD (2017) identifies many potential development sites within or near Wood Green Metropolitan Centre, including Haringey Heartlands. The following sites are identified as having theoretical potential for town centre uses (site area/indicative town centre uses floorspace capacity in brackets):

- SA5: LBH Civic Centre (1.1ha / 1,078 sq.m);
- SA7: Wood Green Bus Garage (1.34ha / 2,412 sq.m);
- SA8: Station Road Offices (0.87ha / 2,412 sq.m);
- SA9: Mecca Bingo (0.85ha / 1,484 sq.m);
- SA10: Morrison's, Wood Green High Street (1.02ha / 1,855 sq.m);
- SA11: Wood Green Library (1.35ha / 2,783 sq.m);
- SA13: Bury Road Car Park (1.24ha / 1,484 sq.m);
- SA14: 16-54 Wood Green High Road (1.56ha / 2,597 sq.m);
- SA15: Westbury & Whymark Avenues (0.45ha / 742 sq.m); and
- SA16: Turnpike Lane Triangle (0.16ha / 371 sq.m); and
- SA22: Clarendon Square (4.66ha / 920 sq.m).

6.36 In total these sites have theoretical capacity for over 18,000 sq.m gross of town centre uses. It is unlikely all these sites will be redeveloped over the plan period and not all sites will result in a net increase in town centre uses floorspace e.g. the Morrison's and Mecca Bingo sites. However, if the latter were to become available then higher density mixed use development could be accommodated with retail and/or other town centre use at ground floor level. Nevertheless, the delivery of some of these development opportunities should be sufficient to accommodate the projected residual town centre uses floorspace capacity up to 2038 (5,100 sq.m gross).

South West Haringey (Zone 2)

6.37 Crough End and Muswell Hill District Centres are in Zone 2. This zone also has a good provision of existing retail and food/beverage facilities but the 2033 floorspace projections for South West Haringey suggest an over-supply of floorspace (about -1,300 sq.m gross) up to 2033. Longer term growth suggests modest capacity for about 1,100 sq.m gross by 2038. The additional requirement for commercial leisure/cultural floorspace could be 1,000 sq.m by 2033 increasing to 1,600 sq.m by 2038. The total combined requirement at 2038 (cumulative) is about 2,700 sq.m gross as shown in Table 6.2. This floorspace requirement relates to food/beverage, leisure, entertainment and cultural uses, which could enhance the night-time economy in Zone 2.

Table 6.2 Combined retail, food/beverage, leisure and cultural floorspace requirements for Zone 2 (sq.m gross)

Zone	Convenience retail (sq.m gross)	Comparison retail (sq.m gross)	Food/ beverage (sq.m gross)	Leisure/ cultural (sq.m gross)	Total (sq.m gross)
By 2033	-300	-1,400	400	1,000	-300
By 2038	100	-900	1,900	1,600	2,700

6.38 There are 70 vacant shop units in Zone 2 and the shop vacancy rate is 9.9%. If the vacancy rate reduced to 7% then reoccupied floorspace in this zone could be about 1,700 sq.m gross, which exceeds the long-term retail and food/beverage floorspace projection up to 2038 (1,100 sq.m

gross). The residual requirement including commercial leisure/cultural floorspace could be about 1,000 sq.m gross by 2038.

6.39 The Haringey Site Allocations DPD (2017) identified no potential development sites within or near Muswell Hill District Centre and Crouch End District Centre including retail/food beverage floorspace. However, one allocated site in the Highgate area was identified as having potential for town centre uses i.e. SA40: Gonnerman Antiques and Goldsmith's Court (0.63ha) with a town centre uses floorspace capacity of 284 sq.m.

6.40 Based on the projection to 2033, there is no need to allocate further sites for main town centre uses within Zone 2 – South West Haringey. The priority should be the reoccupation of vacant premises. Any mixed use development located out of centre should only include small scale retail and services to meet the needs of the development and the local area.

North East Haringey (Zone 3)

6.41 Bruce Grove/Tottenham High Road is the only main centre in Zone 3, but Tottenham Hale was identified as a potential new District Centre to the south east of the zone. The Tottenham Area Action Plan 2017 identified land capable of delivering 10,000 new homes and 5,000 new jobs, which provided a basis for the development of a new district centre at Tottenham Hale. As indicated in Section 3, district centres in London vary in size, generally between 5,000 to 25,000 sq.m of retail, leisure and service floorspace space.

6.42 Population within Zone 3 is projected to increase by 13,221 people between 2021 and 2038, which will include residential development at Tottenham Hale. This growth in population has been assessed in the floorspace capacity analysis within this study.

6.43 The 2033 retail/food beverage floorspace projections for North East Haringey is about 2,000 sq.m gross, increasing to 2,800 sq.m gross in 2038. The additional requirement for commercial leisure/ cultural floorspace could be 1,600 sq.m by 2033 increasing to 2,500 sq.m by 2038. The total combined requirement at 2038 (cumulative) is about 5,300 sq.m gross as shown in Table 6.3. Over 58% of this floorspace requirement relates to food/beverage, leisure, entertainment and cultural uses, which could enhance the night-time economy in Zone 3.

Table 6.3 Combined retail, food/beverage, leisure and cultural floorspace requirements for Zone 3 (sq.m gross)

Zone	Convenience retail (sq.m gross)	Comparison retail (sq.m gross)	Food/ beverage (sq.m gross)	Leisure/ cultural (sq.m gross)	Total (sq.m gross)
By 2033	1,300	300	400	1,600	3,600
By 2038	1,700	500	600	2,500	5,300

6.44 These relatively low updated floorspace capacity projections for the whole of Zone 3, suggest a new district centre is no longer required at Tottenham Hale, particularly in the short to medium term.

6.45 The Tottenham Area Action Plan AAP (2017) and Haringey Site Allocations DPD (2017) identify many potential development sites within Zone 3. Within Bruce Grove/Tottenham High Road District Centre only two sites are identified as having potential for town centre uses (site area/indicative town centre uses floorspace capacity):

- BG2: Bruce Grove Bus Station (0.17ha / 100 sq.m); and
- BG3: Bruce Grove Snooker Hall and Banqueting Suite (0.43ha / 850 sq.m).

6.46 At Tottenham Hale the following sites are identified as having potential for town centre uses:

- TH3: Tottenham Hale Retail Park (4.76ha / 13,900 sq.m); and

- TH5: Station Square North (1.43ha / 7,300 sq.m).

6.47 Elsewhere in Zone 3 the following sites are allocated (area/indicative town centre uses floorspace capacity):

- NT3: Northumberland Park North (5.02ha / 340 sq.m);
- NT5: High Road West (11.69ha / 11,740 sq.m);
- NT6: North of White Hart Lane (1.03ha / 1,000 sq.m);
- NT3: Northumberland Park North (5.02ha / 340 sq.m);

6.48 In total these sites have theoretical capacity for over 35,000 sq.m gross of town centre uses. It is unlikely all these sites will be redeveloped over the plan period and not all sites will result in a net increase in town centre uses floorspace e.g. Tottenham Hale Retail Park.

6.49 There are 36 vacant shop units in Zone 3 and the shop vacancy rate is 10.8%. If the vacancy rate reduced to 7% then reoccupied floorspace in this zone could be about 1,000 sq.m gross, which is over 50% of the retail and food/beverage floorspace projection to 2033, and 36% of the long-term projection to 2038.

6.50 Allowing for this reoccupation of vacant floorspace, there could be a residual requirement for about 1,000 sq.m gross at 2033 increasing to 1,800 sq.m gross by 2038. The residual requirement including commercial leisure/cultural floorspace could be 2,600 sq.m gross by 2033 increasing to 4,300 sq.m gross by 2038.

6.51 The delivery of some of the development opportunities at Bruce Grove/Tottenham High Road District and the enhancement of facilities at Tottenham Hale in the longer term will be sufficient to accommodate the projected residual retail, food/ beverage and leisure/cultural floorspace capacity up to 2038 (4,300 sq.m gross). However, the floorspace projections indicate the likely scale of development required will not be capable of supporting a new district centre at Tottenham Hale, particularly up to 2033.

6.52 Any mixed use development on out of centre sites should only include small scale retail and services to meet the needs of the development and the local area.

South East Haringey (Zone 4)

6.53 Green Lanes (including Arena Park) and West Green Road/Seven Sisters District Centres are in Zone 4. Tottenham Hale Retail Park also serves this zone. This zone also has a good provision of existing retail provision.

6.54 The 2033 retail/food and beverage floorspace projections for South East Haringey is 2,151 sq.m gross, increasing to 4,719 sq.m gross in 2038. The additional requirement for commercial leisure/cultural floorspace could be 1,300 sq.m by 2033 increasing to 2,100 sq.m by 2038. The combined floorspace requirement at 2038 is about 6,800 sq.m gross. The total combined requirement (cumulative) at 2038 is about 6,800 sq.m gross as shown in Table 6.4. Over half of this floorspace requirement relates to food/beverage, leisure, entertainment and cultural uses, which could enhance the night-time economy in Zone 4.

Table 6.4 Combined retail, food/beverage, leisure and cultural floorspace requirements for Zone 4 (sq.m gross)

Zone	Convenience retail (sq.m gross)	Comparison retail (sq.m gross)	Food/ beverage (sq.m gross)	Leisure/ cultural (sq.m gross)	Total (sq.m gross)
By 2033	1,100	200	900	1,300	3,500
By 2038	1,700	1,600	1,400	2,100	6,800

6.55 There are 86 vacant shop units in Zone 4 and the shop vacancy rate is 11.5%. If the vacancy rate reduced to 7% then reoccupied floorspace in this zone could be about 2,700 sq.m gross, which could accommodate all the retail and food/beverage floorspace projection to 2033, and 57% of the long-term projection to 2038. Allowing for this reoccupation of vacant floorspace, there could be a residual requirement for about 2,000 sq.m gross by 2038.

6.56 The residual requirement including commercial leisure/cultural floorspace could be about 800 sq.m gross by 2033 increasing to 4,100 sq.m gross by 2038.

6.57 The Tottenham Area Action Plan AAP (2017) and Haringey Site Allocations DPD (2017) identify many potential development sites within Zone 4. Within Green Lanes and West Green Road/ Seven Sister District Centre only two sites are identified as having potential for town centre uses (site area/indicative town centre uses floorspace capacity):

- SA29: Arena Retail Park (5.49ha / 5,390 sq.m); and
- SS5: Wards Corner (0.7ha / 3,680 sq.m).

6.58 Elsewhere in Zone 4, the following sites are allocated (area/indicative town centre uses floorspace capacity):

- SA28: Saint Ann's Hospital Site (11.41ha / 148 sq.m);
- SA36: Finsbury Park Bowling Alley (0.58ha / 550 sq.m);
- SA37: 18-20 Stroud Green Road (0.44ha / 490 sq.m);

6.59 In total these sites have theoretical capacity for over 10,000 sq.m gross of town centre uses. It is unlikely all these sites will be redeveloped over the plan period and not all sites will result in a net increase in town centre uses floorspace e.g. Arena Retail Park. However, Arena Retail Park is relatively low density and could provide an opportunity for higher density mixed use development with retail and/or other town centre uses at ground floor level, which could result in a net increase in floorspace.

6.60 These development opportunities should be sufficient to accommodate the projected residual retail, food/beverage and leisure cultural floorspace capacity up to 2038 (4,100 sq.m gross). Any mixed use development on out of centre sites should only include small scale retail and services to meet the needs of the development and the local area.

Hierarchy of centres

6.61 The network of town centres is currently set out in Policy SP10 of the Haringey Local Plan Strategic Policies (including alterations since 2017), the supporting text and Figure 5.2. Continuing to identify the hierarchy of centres in the New Local Plan is important in terms of:

1 ensuring the vitality and viability of town and local centres is maintained and enhanced as important hubs for the community, through the application of the impact test;

2 directing retail and main town centre uses to appropriate accessible and sustainable locations, through the application of the sequential approach to site selection; and

3 identifying a viable role and strategy for each centre.

6.62 The network of main and local centres should continue to be protected and enhanced to ensure appropriate accessibility to important facilities for all sections of the community and to ensure sustainable shopping patterns. Wood Green is the largest and dominant town centre in the Borough, consistent with its designation as a Metropolitan Centre in the London Plan. The retail and food beverage floorspace capacity projections up to 2033 suggest nearly half of the

projected growth should be provided in the north west of the Borough, which will primarily be Wood Green.

6.63 Ensuring the future vitality and viability of the Borough's town and local centres will require a multi-faceted approach that will go beyond planning policy. The continuation of existing and new initiatives will be required, for example the Council's Good Economy Recovery Plan, High Streets Recovery Action Plan and Community Wealth Building Approach and funding to regenerate and future proof vulnerable centres e.g. MHCLG Future High Streets Fund and Heritage Action Zone funding in Tottenham.

6.64 The five designated district centres all continue to play an important role as a focal point in their respective areas. It is appropriate to continue to differentiate these district centres from the smaller local centres in the Borough. The retail and food beverage floorspace capacity projections up to 2033 suggest there is potential for growth in the eastern half of the Borough, which will primarily be Bruce Grove, Green Lanes, West Green Road/Seven Sisters and Tottenham Hale District Centres.

6.65 The analysis of designated local centres in Section 3 and Appendix 6, indicates only Archway Road Local Centre could potentially be large enough to be considered as a potential District Centre. However, Archway Road is much smaller than the other district centres in the Borough in terms of the total number of units (118) and the amount of comparison and convenience goods retail outlets. Furthermore, Archway Road is a long linear retail and service area that functions as a series of smaller local parades rather than a single shopping destination.

6.66 The NPPF Annex 2 Glossary indicates:

"References to town centres or centres apply to city centres, town centres, district centres and local centres but exclude small parades of shops of purely neighbourhood significance."

6.67 The analysis of designated local centres indicates that most of the Borough's 38 designated local centres in the Borough are reasonably large (with at least 10 outlets). Arguably, small parades with less than 10 outlets could be downgraded to neighbourhood parade or non-designated frontages status, depending on the availability of essential shops/services, the number of vacant units and their importance in serving a local area with limited alternative provision. There are three local centres with less than 10 outlets and only 2 essential shops/services, as follows:

- Craven Park Road (4 units)
- Hermitage Road (5 units)
- Midhurst Parade (6 units)

6.68 Craven Park Road Local Centre serves the residential area to the south of South Tottenham Station, east of the A10 (Stamford Hill). The nearest alternative centres in the Borough are West Green Road/Seven Sisters District Centre and Broad Lane Local Centre to the north. Access to these centres is constrained by the railway line and these centres are beyond reasonable walking distance. There are local shops and services about 500 metres to the west along Stamford Hill. Given the relatively poor access to alternative local facilities, Craven Park Road should continue to be protected and enhanced as a Local Centre.

6.69 Hermitage Road Local Centre is located between Green Lanes District Centre and Seven Sisters Road Local Centre. Two of the centre's five shop units are vacant. Given the proximity of Green Lanes District Centre and Seven Sisters Road Local Centre, Hermitage Road Local Centre could be downgraded to a Local Parade, particularly if the vacant units remain unoccupied for a long period.

6.70 Midhurst Local Centre is located between Muswell Hill District Centre and East Finchley. The centre has 6 units (one vacant). Given the proximity of Muswell Hill District Centre, Midhurst Local Centre could also be downgraded as a Local Parade.

Impact and sequential tests

6.71 Local Plan policy should set out the sequential and impact tests and which designated centres need to be considered. The NPPF states that, when assessing applications for retail and leisure development outside of town centres which are not in accordance with an up-to-date local plan, local planning authorities should require an impact assessment if the development is over a proportionate, locally set threshold. The London Plan 2021 Policy SD7 is consistent with the NPPF in relation to the sequential and impact tests, although the impact test in the London Plan refers to office uses as well as retail and leisure uses. The new Local Plan in Haringey could adopt either the London Plan or NPPF approach. However, there is no need to assess the impact of office development in Haringey provided the sequential test is satisfied.

6.72 The NPPF indicates, if there is no locally set threshold, then the default impact threshold is 2,500 sq. m gross. The PPG provides guidance on setting locally appropriate thresholds, and indicates it will be important to consider:

- the scale of proposals relative to town centres;
- the existing viability and vitality of town centres;
- cumulative effects of recent developments;
- whether local town centres are vulnerable;
- the likely effects of development on any town centre strategy; and the impact on any other planned investment.

6.73 The PPG also states that where authorities do not have their own floorspace thresholds for impact assessments in local development plans, national policy requires impact assessments to be submitted for retail and leisure developments over 2,500 sq.m gross. The PPG acknowledges the need to consider the impact of proposals below this floorspace threshold, e.g. if they are large developments when compared with the size of a nearby centre, or likely to have a disproportionate effect or 'tip the balance' of a vulnerable centre.

6.74 The NPPF minimum threshold of 2,500 sq.m gross may be an inappropriate threshold for LB Haringey because this scale of development would exceed the overall long-term retail/food beverage/leisure projections for all zones in the Borough. The lower retail capacity projections and uncertainties about the post-Covid recovery suggest town centres are now more vulnerable to out-of-centre developments.

6.75 Given the overlapping nature of catchment areas in LB Haringey, a consistent impact threshold should be applied across the authority area. However, policy should also indicate that impact assessments should be proportionate to the scale of development proposed.

6.76 LBH should consider reducing the impact threshold to 400 sq.m gross consistent with the Sunday trading threshold. This threshold should apply to retail and leisure uses combined, also combined floorspace across different phases of development. All retail and leisure developments over 400 sq.m gross (combined) proposed outside or on the edge of designated Metropolitan, District and Local Centres should be required to prepare a proportionate impact assessment, including retail and leisure uses included within mixed use allocations. The level of detail required in the impact assessment will vary case-by-case and it is for the applicant to provide robust justification that their impact assessment is robust, appropriate and proportionate.

6.77 Retail and leisure uses previously related to use classes A1 to A5 and D2 leisure uses. Changes to the UCO may lead to confusion, at least until the NPPF is amended to reflect the UCO changes. For example, not all uses within the new Class E are retail or leisure uses, requiring an impact assessment i.e. offices and medical uses. Bearing in mind the potential for confusion arising from the UCO changes and for consistency with the NPPF, future policy relating to the impact test should refer to retail and leisure uses rather than Class E within the new UCO. As indicated above, the London Plan indicates the impact proposals for out of centre office uses should also be considered. The inclusion of office uses within the sequential test should offer appropriate control in Haringey, consistent with the NPPF.

Town centre boundaries

6.78 Local London Plan Policy SD7 indicates development plans should define detailed boundaries for town centres. Designated town, district and local centre boundaries should be tightly drawn to assist in controlling the appropriate scale and nature of development. Designated centres remain the expected focus for retail, leisure and other main town centre uses. The continued classification of centres within the hierarchy is important in identifying which centres are relevant in the search for sequential sites.

6.79 The continued identification of town centre boundaries is important when applying the sequential approach, to direct retail and other town centre uses to sustainable locations and determine whether a retail impact assessment is required. The NPPF continues to indicate that the first preference for retail and other town centre uses should be the primary shopping areas (PSA) for retail uses and the town centre boundary for other town centre uses. The first preference for leisure uses is normally the wider defined town centre, which usually includes the PSA and other parts of the town centre. The ability to focus new retail uses within the PSA, rather than the wider town centre area, has become more difficult with the introduction of the new Class E, which allows free movement to and from retail use and other town centre uses.

6.80 The supporting text to Haringey DMP Policy DM41 indicates new retail development should be focussed in the PSA, rather than the town centre boundary. Policy regarding edge and out-of-centre development should be consistent with the NPPF in terms of the sequential and impact tests and should be worded to refer to the centre boundaries. The PSA normally comprises the core/primary shopping frontages and the contiguous secondary shopping frontages. In many small centres the PSA (primary and secondary frontages combined) and the town centre boundary may cover the same area and it may be unnecessary to designate two boundaries. The need for separate town centre and PSA boundaries within District Centre should be considered, particularly due to additional flexibility provided under the new Class E. A separate PSA may only be appropriate in Wood Green Metropolitan Centre. In other centres a single centre boundary should suffice for sequential test purposes.

6.81 All main town centre uses located outside or on the edge of designated Metropolitan, District and Local Centres should be required to consider the sequential test. The area of search for sequential sites i.e. relevant centres will depend on the scale, nature and location of the proposed town centre uses and the catchment area they are likely to serve, should be considered on a case-by-case basis. Some proposed main town centre uses may have market and locational requirements that cannot be met within designated centres. Where this requirement is suggested, robust justification must be provided by the applicant.

6.82 The relatively low floorspace capacity projections, the number of vacant shop units and assessment of potential development opportunity sites in centres suggest there is no need to extend the centre boundaries to accommodate future growth. The floorspace projections suggest a short term over-supply of retail floorspace imply the contraction of some centre boundaries could be considered. However, longer term projections to 2033 and 2038 suggests significant

contraction would not be appropriate. The expansion or contraction of centre boundaries should be considered on a centre by centre basis.

6.83 The extension of centre boundaries should only be necessary where there are existing retail/town centre uses, just outside the centre boundary, that are worthy of future protection. The contraction of centre boundaries could be considered where there is a concentration of non-town centre uses on the periphery of centres e.g. residential gaps in frontages or a concentration of vacant shop units.

6.84 In this respect, Lichfields' analysis of the town and local centres indicates some minor amendments to centre boundaries could be considered by LBH.

6.85 Wood Green has a relatively low shop vacancy rate of 6.5% and the combined retail, food/beverage and leisure floorspace capacity projection up to 2033 for Zone 1 is 3,900 sq.m gross. These figures suggest the contraction of Wood Green's centre boundary is unnecessary. Wood Green's boundary covers a wide area including Council offices and other non-commercial uses in the north. This implies development on these sites would not be considered against the impact and sequential tests. The centre is bound by residential areas and green space to the north and south of the boundary. No amendments to the Wood Green Metropolitan Centre are recommended.

6.86 Bruce Grove/Tottenham High Road Centre is focused on two roads, Bruce Grove and High Road (A10). The centre boundary is relatively tightly drawn around retail and commercial area. The commercial area along Bruce Grove is constrained by residential streets. Bruce Grove/ Tottenham High Road has a similar shop vacancy rate when compared with the national average (12.1% compared with 14.6%). The combined retail, food/beverage and leisure floorspace capacity projection up to 2033 for Zone 3 is 3,600 sq.m gross. These figures suggest the contraction of Bruce Grove/ Tottenham High Road's centre boundary is unnecessary.

6.87 Other potential changes to Bruce Grove/Tottenham High Road Town centre boundary could be considered. There are additional shops and services further north and south of the centre boundary on High Road. The boundary could be extended north from the Aldi store, on the east side of the A1010 (High Road), to the junction with Scotland Green. The extension could also include three retail units on west side of the A1010. The boundary could extend south to the junction with Chestnut Road. Both extensions would incorporate units directly adjacent to the existing boundary.

6.88 Crouch End centre boundary is arranged around the convergence of five roads. The retail frontages are reasonably compact with units along these five roads all located close to the retail frontages on The Broadway. Crouch End has a relatively low shop vacancy rate of 10.6% and the combined retail, food/beverage and leisure floorspace capacity projection up to 2033 for Zone 2 is only -300 sq.m gross. These figures suggest the contraction of Crouch End's centre boundary is unnecessary.

6.89 Potential changes to Crouch End town centre boundary could include additional shops and services to the north west of the centre along Park Road. The units on the north east side of Park Road, between the junction with Lynton Road to the junction with Palace Road could be added into the district centre. Alternatively, they could be designated as a new local centre/local parade, although directly adjacent to the existing boundary. Additionally, the boundary could also be extended to include the M&S food store situated on the east side of Crouch End Hill at the southern end of the centre.

6.90 Green Lanes is a linear town centre which also includes Arena Retail Park at the southern boundary. Green Lanes has a relatively low shop vacancy rate of 10.8% and the combined retail, food/beverage and leisure floorspace capacity projection up to 2033 for Zone 4 is 3,500 sq.m

gross. These figures suggest the contraction of the Green Lanes centre boundary is unnecessary. The centre boundary is tightly drawn around the retail and commercial area. The centre is predominantly bound by residential development. Additional shops and service uses to the north of the centre boundary, on the west side of Green Lanes Road (A105) could be included within the centre boundary.

6.91 Muswell Hill is a relatively compact centre with the units along Muswell Hill Broadway and Fortis Green all close to the central junction of Muswell Hill Broadway, Queens Avenue and Muswell Hill. Muswell Hill has a low shop vacancy rate of 5.7% and the combined retail, food/beverage and leisure floorspace capacity projection up to 2033 for Zone 2 is only -300 sq.m gross. These figures suggest the contraction of Muswell Hill's centre boundary is unnecessary. No amendments to the Muswell Hill Town Centre are recommended.

6.92 West Green Road/Seven Sisters is relatively compact and the centre has a relatively low shop vacancy rate of 10.8%. The combined retail, food/beverage and leisure floorspace capacity projection up to 2033 for Zone 4 is 3,500 sq.m gross. These figures suggest the contraction of the centre boundary is unnecessary. The centre boundary is relatively tightly drawn along West Green Road and a small isolated section of units on the east side of High Road, north of the junction with Broad Lane. There are several retail and service units located north of the boundary, on the east side of High Road, which could be included in the centre boundary. The boundary could be extended further north from the Tesco superstore to the junction with Tottenham Green East South Side. The boundary could also be extended further west along West Green Road (A504) to the junction with Lawrence Road and further west along Seven Sisters (A503), to include more retail/service uses.

6.93 Further changes to local centre boundaries that could be considered are as follows:

1 Green Lanes Local Centre (LC12) – additional units north of the centre boundary on Green Lanes could be included in the centre boundary to protect the town centre uses.

2 Lordship Lane West Local Centre (LC18) – there are two units east and west of the centre boundary (a betting shop and a Tesco Express) on the north side of Lordship Lane. Additionally, there are three units on the south side of Lordship Lane which could be added to the centre boundary. This would protect own centre uses and would fill an existing gap between two separate sections of the centre.

3 Myddelton Road Local Centre (LC21) – there are additional units located at 70-66 Myddleton Road which could be included within the centre boundary.

4 Park Lane Local Centre (LC22) – there are three units, including a post office, on the south side of Park Lane which could be included within the centre boundary. This would improve the LNI score of the centre and protect important centre uses.

5 Seven Sister Road Local Centre (LC27) – a hostel/Public House located north east of the centre boundary, on the east side of Seven Sisters Road, could be included within the centre boundary on the opposite side of Albert Road, which would improve the LNI score of the centre.

6 Turnpike Lane Local Centre (LC33) – there are additional units south west of the centre boundary down Wightman Road which could be included within the centre boundary.

Scale of development within centres

6.94 The Haringey Development Management DPD 2017 Policy DM41: New Town Centre Development supports in-centre development for new retail, leisure and cultural uses where it is consistent with the size, role and function of the centre and its catchment. Whilst not advocated by the NPPF, the London Plan 2021 Policy SD7 indicates development proposals should ensure

commercial floorspace relates to the size, role and function of the town centre and its catchment, the same as Policy DM41.

6.95 Given the relatively low floorspace capacity projections identified in this study, overlapping catchment areas and the high shop vacancy rates in some centres, a policy to control the scale of development within centres, i.e. development that could harm the hierarchy of centres, appears sound because this approach is consistent with the London 2021. This approach is also helpful in applying the sequential approach to site selection.

Controlling the mix of uses

6.96 Development Management DPD Policy DM42 Primary and Secondary Shopping Frontages: relates to Wood Green Metropolitan Centre and the District Centres. The Primary Shopping Frontages (PSF) are expected to contain the main concentration of retail use. Policy DM42 seeks to restrict non-retail uses at ground floor level to not more than 35% of the units in the entire PSF and avoids concentration of more than two adjoining non-retail uses. Active frontages should also be retained. Within the Secondary Shopping Frontages (SSF) policy allows more flexibility with up to 50% non-retail uses permitted.

6.97 LDC land use information for the main centres in the Borough in 2020 indicate the current proportion of non-retail units in each centre is as follows (excluding vacant units):

- Wood Green Metropolitan Centre - 41.4% non-retail;
- Bruce Grove/Tottenham High Road District Centre - 49.7% non-retail;
- Crouch End District Centre - 55.7% non-retail;
- Green Lanes District Centre - 53.7% non-retail;
- Muswell Hill District Centre - 42.9% non-retail; and
- West Green Road/Seven Sisters District Centre - 57.4% non-retail.

6.98 These figures implies the threshold for non-retail uses has been breached in Crouch End, Green Lanes and West Green Road/Tottenham High Road, and probably also in Bruce Grove/ Tottenham High Road. The 35% and 50% thresholds for non-retail now only appears relevant in Wood Green and Muswell Hill.

6.99 Development Management DPD Policy DM43: Local Shopping Centres also seeks to protect retail uses and active frontages. This policy seeks to restrict non-retail uses at ground floor level to not more than 50% of the total units in the centre, similar to the SSF in the main centres. Policy DM44: Neighbourhood Parades and Other Non-Designated Frontages seeks to control changes from retail use subject to criteria relating to a minimum marketing time period and suitable alternative provision within 400 metres reasonable walking distance.

6.100 Policy DM 45: Optimising the Use of Town Centre Land and Floorspace encourages new mixed use development in town centres, including residential uses, subject to the impact on designated frontages.

6.101 Existing policy seeks to concentrate and protect retail uses within the PSF, whilst allowing a more flexible approach in SSF. These frontage designations need to be reconsidered in the context of the trends and changes outlined in Section 2; the centre health checks in Appendix 5 and the updated floorspace capacity projections. Adopting the same approach across all centres also needs to be assessed.

6.102 There are four broad policy approaches that could be considered for future policy, as follows:

1. strengthening shop frontages policies to provide more control over the loss of retail and service uses. This would usually involve extending the PSF and/or increasing the restrictions on uses permitted;
2. retaining the existing approach to control the mix of uses as currently set out in adopted policy;
3. relaxing shop frontages policies to allow a more flexible approach to enable more non-town centre uses. This would usually involve reducing the PSF and/or introducing more flexibility; or
4. a laissez-faire approach that does not seek to protect retail and town centre uses, on the basis that the market will determine the appropriate mix of uses within town centres.

6.103 As indicated above, the threshold for non-retail uses appears to have been breached in at least three if not four of the main centres, and therefore a strengthening of the current policy restrictions does not appear to be justified. Considering current and likely future market trends, the revised floorspace capacity projections, and changes to the UCO and permitted development rights described earlier, Options 1 and 2 are unsound and unimplementable approaches. The UCO/PDR changes prevent a more restrictive approach, recognising that the introduction of Article 4 directions can only remove permitted GPDO changes of uses but not movement within the same use class i.e. new Class E. The continuation of the current adopted policy approach (Option 2) will also be undermined and hampered by the UCO/PDR changes. Furthermore, this approach could be inappropriate as it could lead to an increase in vacant units. Demand from retail occupiers has reduced and the updated comparison and convenience goods floorspace projections are much lower than previous projections.

6.104 As a result of these recent changes and the current land use mix in most centres, Options 3 and 4 now appear to be the most appropriate approaches available to LBH.

6.105 Future policy could seek to encourage all Class E uses within centre boundaries and potentially other community uses (now Classes F.1 and F.2). The wording of future policy could be amended to refer to Class E uses within PSF. This could include some other main town centre uses not previously permitted at ground floor level e.g. offices and leisure uses. Non-Class E uses including pubs, bars, hot food takeaways and other Sui Generis uses could be assessed against a criteria-based policy relating to breaks in active frontages, amenity issues (noise/smells), impact on the nature and character of the retail frontages. All other non-Class E uses at ground floor level could be controlled within the PSF or all frontages, but again this would be undermined by PDR changes outside of conservation areas.

6.106 If Option 3 is adopted then the policy could apply to the PSF only, still allowing significant flexibility in the SSF. Alternatively, a more flexible approach could be adopted that allows any main town centre use at ground floor level including Class E, Class F.1, F.2, Class C1 (hotels/guest houses) and other main town centre uses categorised as Sui Generis (e.g. pubs/bars and takeaways). This approach would not prevent the loss of town centre uses to residential and other non-town centre uses through the PDR changes.

6.107 Policy could actively seek to encourage restaurants, cafés and bars in appropriate areas in order to improve the evening economy in centres that have a relatively poor provision of these uses, for example Wood Green, Bruce Grove/Tottenham High Road and West Green Road/Seven Sisters. Food and beverage clusters could be designated in areas less sensitive in terms of residential amenity and impact on parking and servicing.

6.108 Policy DM46 seeks to direct betting shops to town and local centres, provided over-concentrations are avoided and there is no harm to the vitality and viability of the centre. Similarly, Policy DM47 directs hot food takeaways to town centres subject to criteria relating to

overconcentration, impact on vitality and viability, amenity, access, servicing and parking arrangements.

6.109 Betting shops and hot food takeaways are Sui Generis uses that can still be controlled by policy, and this not affected by changes to the Use Classes Order or Permitted Development Rights. Furthermore, The London Plan 2021 Policy E9: Retail, Markets and Hot Food Takeaways indicates hot food takeaways should not be permitted where they are within 400 metres walking distance from the entrances/exits to primary and secondary schools. The objective of this policy criterion relates to public health concerns rather than the appropriate mix of uses. However, this policy also suggests the over-concentration of hot food takeaways should be managed in town centres and other areas. The London Plan is more restrictive towards new hot food takeaways than Policy DM7.

6.110 Land use survey and LDC information suggests Wood Green (7.9%), Green Lanes (6.6%) and West Green Road/Seven Sister (8.1%) have a higher average proportion of hot food takeaways when compared with the UK average (6.1%). These percentages, on their own, do not suggest an over-concentration of hot food takeaways within any centre or potential harm to the centre's vitality and viability. However, LBH could adopt a restrictive policy in line with the health objectives of the London Plan and/or control impact on amenity, access, servicing and parking arrangements.

7.0 Summary and conclusions

7.1 This section draws together the analysis set out in previous sections and provides strategic recommendations for Haringey Borough. It explores how the identified growth across the Borough could be accommodated and the future role of the main centres.

Haringey Borough's needs

7.2 The NPPF states that local planning authorities should assess the quantitative and qualitative needs for land or floorspace for retail and leisure development over the plan period. When planning for growth in their town centres, local planning authorities should allocate a range of suitable sites to meet the scale and type of retail development needed. It is important that the needs for retail and other main town centre uses are met in full and not compromised by limited site availability.

7.3 The combined floorspace projections for retail, food/beverage and commercial leisure/ entertainment/cultural floorspace at 2028, 2033 and 2038 are summarised and rounded in Table 7.1, 7.2 and 7.3.

Table 7.1 Summary of combined retail, food/beverage, leisure and cultural floorspace requirements up to 2028 (sq.m gross)

Zone	Convenience retail (sq.m gross)	Comparison retail (sq.m gross)	Food/ beverage (sq.m gross)	Leisure/ cultural (sq.m gross)	Total (sq.m gross)
1 - North West Haringey	700	-800	800	500	1,200
2 - South West Haringey	-400	-1,400	-500	500	-1,800
3 - North East Haringey	900	0	200	800	1,900
4 - South East Haringey	600	-700	400	700	1,000
Total	**1,800**	**-2,900**	**900**	**2,500**	**2,300**

Table 7.2 Summary of combined retail, food/beverage, leisure and cultural floorspace requirements up to 2033 (sq.m gross gross)

Zone	Convenience retail (sq.m gross)	Comparison retail (sq.m gross)	Food/ beverage (sq.m gross)	Leisure/ cultural (sq.m gross)	Total (sq.m gross)
1 - North West Haringey	1,200	0	1,600	1,100	3,900
2 - South West Haringey	-300	-1,400	400	1,000	-300
3 - North East Haringey	1,300	300	400	1,600	3,600
4 - South East Haringey	1,100	200	900	1,300	3,500
Total	**3,300**	**-900**	**3,300**	**5,000**	**10,700**

Table 7.3 Summary of combined retail, food/beverage, leisure and cultural floorspace requirements up to 2038 (sq.m gross)

Zone	Convenience retail (sq.m gross)	Comparison retail (sq.m gross)	Food/ beverage (sq.m gross)	Leisure/ cultural (sq.m gross)	Total (sq.m gross)
1 - North West Haringey	1,700	1,500	2,400	1,700	7,300
2 - South West Haringey	100	-900	1,900	1,600	2,700
3 - North East Haringey	1,700	500	600	2,500	5,300
4 - South East Haringey	1,700	1,600	1,400	2,100	6,800
Total	**5,200**	**2,700**	**6,300**	**7,900**	**22,100**

7.4 Long term floorspace capacity forecasts beyond 10 years are susceptible to unforeseen circumstances. Growth forecasts for expenditure and turnover are particularly uncertain and

need to be carefully monitored, including the continued growth in home/internet shopping. Long term projections must be treated with caution and kept under review, particularly projections up to 2038.

7.5 The total projection to 2033 is 10,700 sq.m gross which is less than the current amount of vacant shop floorspace in the Borough (about 18,000 sq.m gross). Based on a reasonable reduction in shop vacancy rates, reoccupied space could in theory accommodate nearly 60% of the projected need to 2033 (about 6,000 sq.m gross). However, there is likely to be a shift from comparison goods retail space to convenience goods retail, food/beverage and leisure/cultural uses, with vacant shop premises also converting to these uses. Not all vacant shop units will be suitable for conversion to leisure/cultural uses, therefore new development may be required to accommodate some new uses.

7.6 Future planning policy within the New Local Plan should seek to ensure new mixed use developments are flexible. The design and configuration of buildings should allow for the merger and sub-division of units, offering maximum flexibility to respond to changing operator requirements over the plan period.

7.7 The capacity projections in this update suggest there is no pressing requirement to allocate sites for major retail development in order to accommodate projected growth over the next 10 years. The priority in the short to medium term will be the reoccupation of vacant shop units. However, the future strategy should be flexible to respond to new investment that cannot be accommodated in vacant units. Some redevelopment, refurbishment and expansion may be required in addition to the reoccupation of vacant units, ideally within town centres to accommodate future investment opportunities.

7.8 Future policy/supporting could refer to the following floorspace projections up to 2033 and should continue to promote and encourage the provision of retail and other main town centre uses:

- Convenience goods retail 3,300 sq.m gross
- Food/beverage uses 3,300 sq.m gross
- Commercial leisure, entertainment and culture 5,000 sq.m gross
- **Total** **11,600 sq.m gross**

7.9 Residents in Haringey Borough have reasonable access to a range of commercial leisure and entertainment facilities within the Borough and in the surrounding areas. Facilities in Central London are accessible. Most of the key sectors are represented. There may be potential up to 2038 to improve facilities as follows:

- 3 to 5 additional medium sized health and fitness facilities (about 500 new fitness stations); and
- a ten pin bowling facility;
- a trampoline centre, bingo hall and other new leisure innovations e.g. indoor climbing, escape rooms, virtual sport activities.

7.10 The development strategy should to be flexible to respond to emerging opportunities for new leisure, entertainment and tourist related facilities.

Strategy for accommodating growth

7.11 The floorspace projections shown in this study provide broad guidance. The priority should be to concentrate, if possible, new main town centre uses within vacant floorspace within centres. A cautious approach to new retail and food/beverage is required in the short to medium term. Any

mixed use development located out of centre should only include small scale retail and services to meet the needs of the development and the local area.

7.12 In North West Haringey (Zone 1) is a Metropolitan Centre, serving a wider area. The combined retail, food/beverage and leisure cultural floorspace projections for North West Haringey at 2033 is about 3,900 sq.m gross, increasing to 7,300 sq.m gross by 2038. Re-occupied vacant floorspace could be about 2,200 sq.m gross. The residual floorspace capacity could be reduced to 1,700 sq.m gross by 2033 increasing to 5,100 sq.m gross by 2038.

7.13 The Haringey Site Allocations DPD (2017) identifies many potential development sites within or near Wood Green Metropolitan Centre, including Haringey Heartlands, with a theoretical capacity for over 18,000 sq.m gross of town centre uses. The delivery of some of these development opportunities would accommodate the projected residual town centre uses floorspace capacity up to 2038 (5,100 sq.m gross).

7.14 In South West Haringey (Zone 2), which includes Crouch End and Muswell Hill District Centres, there is an over-supply of combined retail, food/beverage and leisure cultural floorspace up to 2033, but the longer-term projection is 2,700 sq.m gross by 2038. Vacant floorspace could accommodate 1,700 sq.m gross leaving residual capacity of about 1,000 sq.m gross by 2038. The allocated site in the Highgate area, identified as having potential for town centre uses, could meet some of this residual requirement, or alternatively residual growth could be redirected to Wood Green as the main Metropolitan Centre.

7.15 In North East Haringey (Zone 3) Bruce Grove/Tottenham High Road is the only main centre, but Tottenham Hale is identified as a potential new District Centre. The combined retail, food/beverage and leisure cultural floorspace projections for North East Haringey at 2033 is about 3,600 sq.m gross, increasing to 5,300 sq.m gross by 2038. Re-occupied vacant floorspace could be about 1,000 sq.m gross, reducing the residual floorspace capacity to 2,600 sq.m gross by 2033 or 4,300 sq.m gross by 2038.

7.16 The Tottenham Area Action Plan AAP (2017) and Haringey Site Allocations DPD (2017) identify many potential development sites within Zone 3 with a combined theoretical capacity for over 35,000 sq.m gross of town centre uses. The delivery of some of these development opportunities at Bruce Grove/Tottenham High Road District and the enhancement of facilities at Tottenham Hale in the longer term will be sufficient to accommodate the projected residual retail, food/ beverage and leisure/cultural floorspace capacity up to 2038 (4,300 sq.m gross). However, the floorspace projections indicate the likely scale of development required will not be capable of supporting a new district centre at Tottenham Hale, particularly for the foreseeable future up to 2033.

7.17 South East Haringey (Zone 4) includes Green Lanes (including Arena Retail Park) and West Green Road/Seven Sisters District Centres. The combined retail, food/beverage and leisure cultural floorspace projections for South East Haringey at 2033 is about 3,500 sq.m gross, increasing to 6,800 sq.m gross by 2038. Re-occupied vacant floorspace could be about 2,700 sq.m gross, reducing the residual floorspace capacity to 800 sq.m gross by 2033 or 4,100 sq.m gross by 2038.

7.18 The Tottenham Area Action Plan AAP (2017) and Haringey Site Allocations DPD (2017) identify potential development sites within Zone 4 with theoretical capacity for nearly 12,000 sq.m gross of town centre uses. These development opportunities can accommodate the projected residual retail, food/beverage and leisure cultural floorspace capacity up to 2038 (4,100 sq.m gross).

Policy review

Hierarchy of centres

7.19 The hierarchy of centres should be identified in the New Local Plan in order to ensure the vitality and viability of town and local centres is maintained and enhanced. Designated centres remain the expected focus for retail, leisure and other main town centre uses. The continued classification of centres within the hierarchy is important in identifying which centres are relevant in the search for sequential sites.

7.20 Wood Green is the largest and dominant town centre in the Borough, consistent with its designation as a Metropolitan Centre in the London Plan. The five designated district centres all continue to play an important role as a focal point in their respective areas. It is appropriate to continue to differentiate these district centre from the smaller local centres. Hermitage Road and Midhurst are small Local Centres within limited essential shops/services and could be downgraded to neighbourhood parade or non-designated frontages status.

7.21 London Plan indicates development plans should define detailed boundaries for town centres. Designated town, district and local centre boundaries should be tightly drawn to assist in controlling the appropriate scale and nature of development.

7.22 The relatively low floorspace capacity projections, the number of vacant shop units and assessment of potential development opportunity sites in centres suggest there is no need to extend the centre boundaries to accommodate future growth. The extension of centre boundaries should only be necessary where there are existing retail/town centre uses, just outside the centre boundary, that are worthy of future protection. In this respect, Lichfields' analysis of the town and local centres indicates some amendment to centre boundaries could be considered by LBH.

Impact and sequential tests

7.23 The NPPF minimum threshold of 2,500 sq.m gross for impact assessments is inappropriate for Haringey Borough because this scale of development would exceed the overall long-term retail/food beverage/leisure projections for all zones in the Borough. This threshold should apply to retail and leisure uses combined, and combined floorspace across different phases of development. The level of detail will vary case-by-case and it is for the applicant to provide robust justification that their impact assessment is appropriate and proportionate. A policy to control the scale of development within centres, i.e. development that could harm the hierarchy of centres, appears sound.

7.24 Town centres are expected to be the focus for retail, leisure and other main town centre uses. All main town centre uses located outside or on the edge of designated Metropolitan, District and Local Centres should be required to consider the sequential test. The continued classification of centres and within the hierarchy is important. Emerging policies should refer to main town centre uses rather than just retail. All main town centre uses regardless of scale are required to comply with the sequential test.

7.25 The area of search for sequential sites i.e. relevant centres will depend on the scale, nature and location of the proposed town centre uses and the catchment area they are likely to serve, should be considered on a case-by-case basis. Future policy should refer to some town centre uses having a market and locational requirements e.g. where it would serve a local need not currently served by designated centres or parade. The onus is on the applicant to provide robust justification.

7.26 Policy regarding edge and out-of-centre development should be consistent with the NPPF in terms of the sequential and impact tests and should be worded to refer to the centre boundaries. The need for separate town centre and primary shopping area (PSA) boundaries within District Centre should be considered, particularly due to additional flexibility provided under the new Class E. A separate PSA may only be appropriate in Wood Green Metropolitan Centre. In other centres a single centre boundary should suffice for sequential test purposes.

Controlling the mix of uses

7.27 Existing policy seeks to concentrate and protect retail uses within the Primary Shopping Frontages (PSF), whilst allowing a more flexible approach in Secondary Shopping Frontages (SSF). The floorspace capacity projections suggest there is a need for a mix of town centre uses to maintain the vitality and viability of centres. Future policy should provide enough flexibility to allow improvements to non-retail uses in appropriate locations that does not impact on nearby residential uses. The introduction of more restrictive shop frontage policies is inappropriate and unimplementable due to changes to the Use Classes Order (UCO) and Permitted Development Rights (PDR).

7.28 Future policy could seek to encourage all Class E uses within centre boundaries and potentially other community uses (now Classes F.1 and F.2). The wording of future policy could be amended to refer to Class E uses within PSF. This could include some other main town centre uses not previously permitted at ground floor level e.g. offices and leisure uses. Non-Class E uses including pubs, bars, hot food takeaways and other Sui Generis uses could be assessed against a criteria-based policy relating to breaks in active frontages, amenity issues (noise/smells), impact on the nature and character of the retail frontages. Alternatively, a more flexible approach could be adopted that allows any main town centre use at ground floor level including Class E, Class F.1, F.2, Class C1 (hotels/guest houses) and other main town centre uses categorised as Sui Generis (e.g. pubs/bars and takeaways). However, this approach would not prevent the loss of town centre uses to residential and other non-town centre uses through the PDR changes.

7.29 Policy could actively seek to encourage restaurants, cafés and bars in appropriate areas in order to improve the evening economy in centres that have a relatively poor provision of these uses, for example Wood Green, Bruce Grove/Tottenham High Road and West Green Road/Seven Sisters. Food and beverage clusters could be designated in areas less sensitive in terms of residential amenity and impact on parking and servicing.

7.30 Betting shops and hot food takeaways are Sui Generis uses that can still be controlled by policy, and this not affected by changes to the UCO or PDR. LBH could adopt a restrictive policy in line with the health objectives of the London Plan and/or control impact on amenity, access, servicing and parking arrangements.

Future monitoring

7.31 The recommendations and projections within this study are expected to assist the Council in reviewing development plan policies over the coming years and to assist development control decisions during this period. The study provides an overview of the potential need for further retail development in the medium term to 2033. Longer-term projections up to 2038 are subject to uncertainty and forecasts will need to be amended to reflect emerging changes, as and when new information becomes available. These uncertainties include the longer-term implications of the Covid-19 crisis that will need to be carefully monitored. Longer-term projections after 20330 should be treated with caution and provide broad guidance only. Projections should be monitored and the floorspace projections rolled forward. The following key assumptions should be updated as necessary:

1 population projections;

2 local expenditure estimates (information from Experian or other recognised providers);

3 growth rate assumptions for expenditure per capita (information from Experian or other recognised data providers);

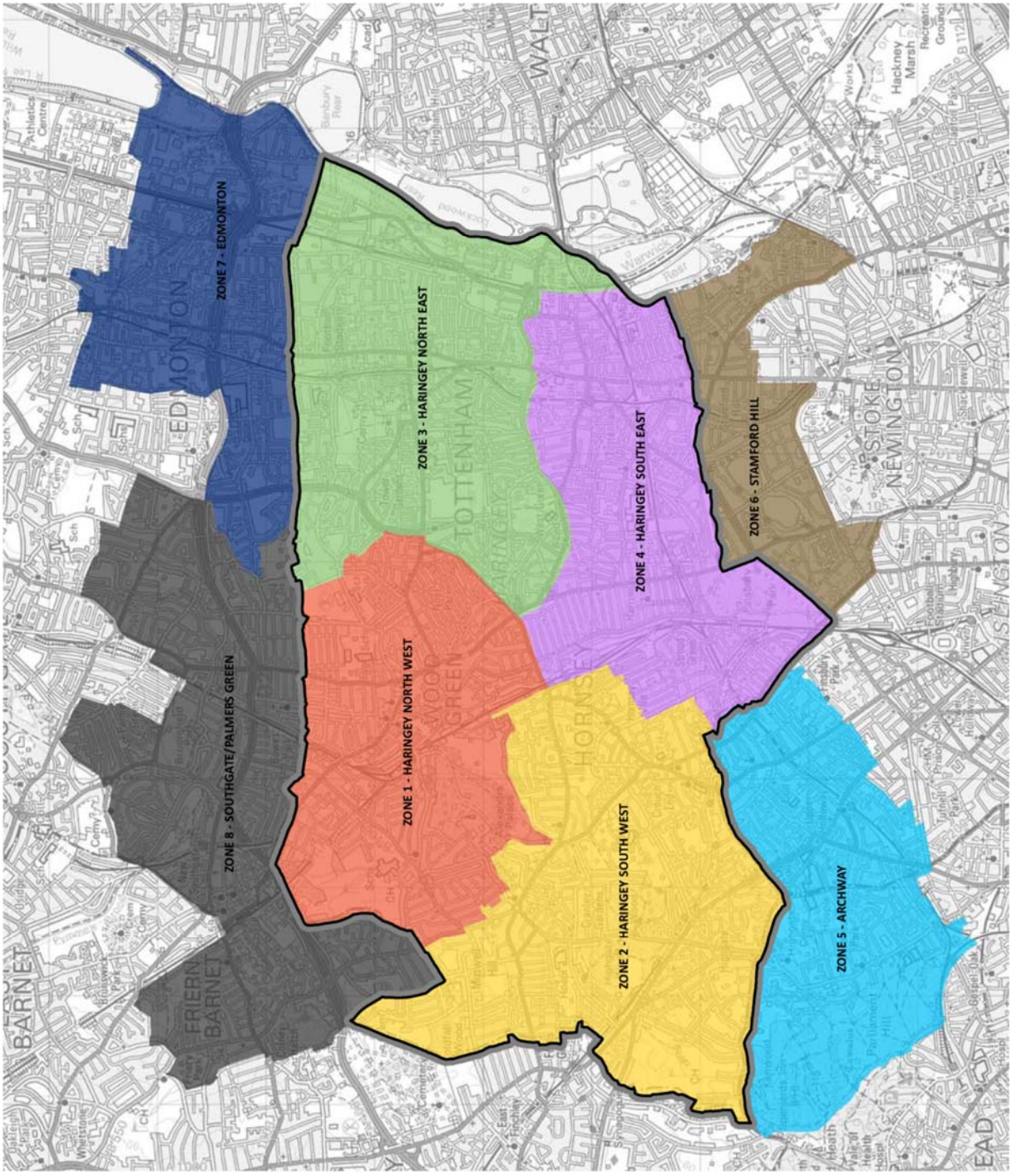
4 the impact of potential increases in home and internet shopping (Experian regularly provides projections for internet shopping and these projections will need to be updated at the same time as expenditure and population figures);

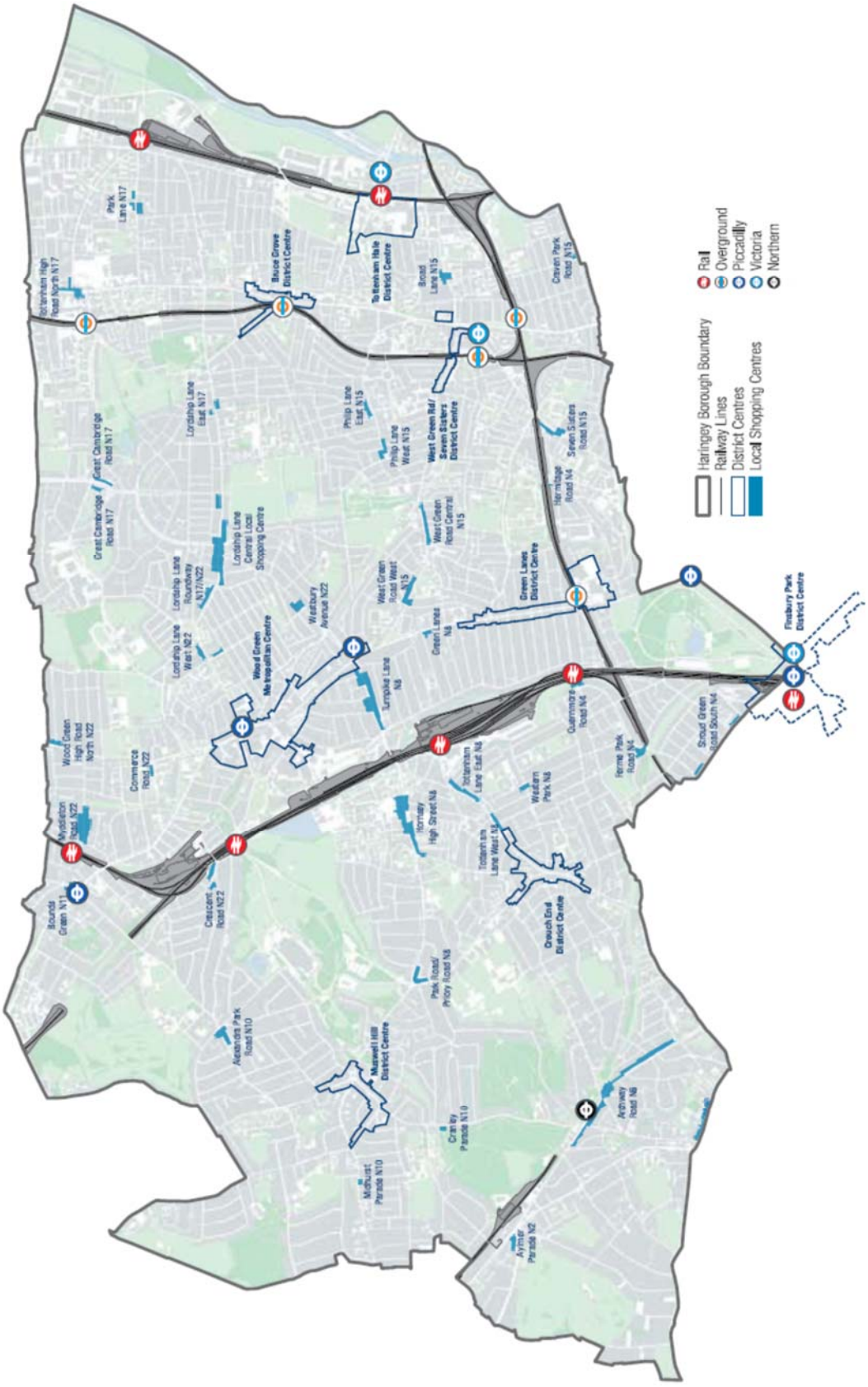
5 existing retail floorspace and average turnover to floorspace densities; and

6 implemented development within and around the study area.

7.32 These key inputs into the retail capacity assessment can be amended to provide revised capacity projections.

Appendix 1 Study area and centre network


ZONE 7 - EDMONTON
ZONE 3 - HARINGEY NORTH EAST
ZONE 4 - HARINGEY SOUTH EAST
ZONE 6 - STAMFORD HILL
ZONE 8 - SOUTHGATE/PALMERS GREEN
ZONE 1 - HARINGEY NORTH WEST
ZONE 2 - HARINGEY SOUTH WEST
ZONE 5 - ARCHWAY
EDMONTON
TOTTENHAM
STOKE NEWINGTON
FRIERN BARNET
BARNET
WOOD GREEN
HORNSEY


Rail
Overground
Piccadilly
Victoria
Northern
Haringey Borough Boundary
Railway Lines
District Centres
Local Shopping Centres
Bruce Grove District Centre
Tottenham Hale District Centre
West Green Rd / Seven Sisters District Centre
Green Lanes District Centre
Finsbury Park District Centre
Muswell Hill District Centre
Crouch End District Centre
Wood Green Metropolitan Centre
Lordship Lane Central Local Shopping Centre
Park Lane N17
Broadwater Farm
Northumberland Park
Tottenham Hotspur Football Club
Alexandra Palace
Alexandra Park
Wood Green
Turnpike Lane
Harringay
Stroud Green
Finsbury Park
Seven Sisters
Tottenham Hale
Bruce Grove
Wood Green
Bounds Green
Crouch End
Muswell Hill
Alexandra Park
Turnpike Lane
Green Lanes
Harringay
Stroud Green
Finsbury Park
Seven Sisters
Tottenham Hale
Bruce Grove
Wood Green
Bounds Green
Crouch End
Muswell Hill
Alexandra Park

Appendix 2 Convenience goods assessment

Table 1 - Study area population projections

Zone	2019	2021	2023	2028	2033	2038
1 - Haringey North West	56,704	57,489	58,588	60,221	61,927	63,945
2 - Haringey South West	62,943	62,272	61,962	60,521	60,285	61,237
3 - Haringey North East	77,740	79,995	82,648	87,547	91,054	93,216
4 - Haringey South East	71,274	71,308	71,745	73,391	74,953	77,534
5 - Archway	53,022	52,855	52,043	51,416	52,303	53,905
6 - Stamford Hill	48,386	49,464	50,414	51,798	53,893	56,731
7 - Edmonton	38,398	40,965	43,235	52,031	54,354	54,783
8 - Southgate/Palmers Green	62,438	61,967	61,474	60,949	62,068	63,744
Total	**470,905**	**476,314**	**482,108**	**497,872**	**510,837**	**525,095**

Sources: Experian popluation for zones at 2019 and GLA ward level population projections - housing led 2018-based

Table 2 - Convenience goods expenditure per person per annum (£)

Zone	2021	2023	2028	2033	2038
1 - Haringey North West	2,055	2,052	2,035	2,036	2,040
2 - Haringey South West	2,612	2,609	2,587	2,589	2,593
3 - Haringey North East	1,811	1,809	1,794	1,795	1,798
4 - Haringey South East	1,955	1,952	1,936	1,937	1,940
5 - Archway	2,251	2,248	2,229	2,231	2,234
6 - Stamford Hill	1,780	1,778	1,763	1,764	1,768
7 - Edmonton	1,793	1,791	1,776	1,777	1,780
8 - Southgate/Palmers Green	2,157	2,154	2,136	2,137	2,141

Sources:
Experian Local Expenditure 2019 (2019 prices)
Experian growth rates - Retail Planner Breifing Note 18 (October 2020)
Excludes Special Forms of Trading (SFT)

Table 3 - Total convenience goods expenditure (£m)

Zone	2021	2023	2028	2033	2038
1 - Haringey North West	118.14	120.22	122.55	126.08	130.45
2 - Haringey South West	162.65	161.66	156.57	156.08	158.79
3 - Haringey North East	144.87	149.51	157.06	163.44	167.60
4 - Haringey South East	139.41	140.05	142.08	145.18	150.42
5 - Archway	118.98	116.99	114.61	116.69	120.42
6 - Stamford Hill	88.05	89.64	91.32	95.07	100.30
7 - Edmonton	73.45	77.43	92.41	96.59	97.51
8 - Southgate/Palmers Green	133.66	132.42	130.19	132.64	136.48
Total	**979.21**	**987.91**	**1,006.78**	**1,031.77**	**1,061.97**

Source: Tables 1 and 2

Table 4 - Base year 2021 convenience goods market shares by zone (%)

Location / Zone	1	2	3	4	5	6	7	8
Zone 1 - Haringey North West								
Morrison's, Wood Green	23.7%	1.2%	7.4%	2.2%	0.5%	0.0%	3.1%	2.5%
Sainsbury's, Wood Green	9.4%	1.1%	2.8%	3.9%	0.0%	0.7%	0.0%	0.4%
Lidl, Wood Green	6.6%	0.5%	3.0%	1.1%	0.0%	0.0%	0.0%	1.6%
Other main stores, Zone 1	12.2%	1.3%	4.7%	3.2%	0.5%	2.4%	0.5%	6.1%
Other Zone 1	9.7%	0.5%	1.6%	0.3%	0.0%	0.0%	0.2%	0.4%
Sub-total	**61.6%**	**4.6%**	**19.5%**	**10.7%**	**1.0%**	**3.1%**	**3.8%**	**11.0%**
Zone 2 - Haringey South West								
Sainsbury's, Muswell Hill	2.2%	12.0%	0.5%	1.1%	0.0%	0.9%	0.0%	0.4%
Sainsbury's, Hornsey High Street	1.4%	16.8%	0.6%	1.6%	0.0%	0.0%	0.2%	0.4%
Other main stores, Zone 2	4.2%	26.7%	1.0%	1.6%	6.3%	1.0%	0.5%	0.5%
Other Zone 2	1.2%	5.7%	0.2%	1.0%	5.8%	0.2%	0.0%	0.0%
Sub-total	**9.0%**	**61.2%**	**2.3%**	**5.3%**	**12.1%**	**2.1%**	**0.7%**	**1.3%**
Zone 3 - Haringey North East								
Asda, Bruce Grove	0.7%	0.4%	8.7%	2.3%	0.0%	2.7%	0.5%	0.2%
Aldi, Bruce Grove	1.1%	0.0%	9.0%	2.1%	0.0%	0.5%	0.1%	0.1%
Sainsbury's, Northumberland Park	1.3%	0.9%	11.3%	2.0%	0.0%	0.0%	7.4%	0.8%
Other main stores, Zone 3	2.9%	1.0%	7.9%	3.4%	0.0%	1.0%	1.0%	0.6%
Other Zone 3	0.6%	0.0%	4.1%	0.1%	0.0%	0.0%	0.0%	0.0%
Sub-total	**6.6%**	**2.3%**	**41.0%**	**9.9%**	**0.0%**	**4.2%**	**9.0%**	**1.7%**
Zone 4 - Haringey South East								
Sainsbury's, Green Lanes	0.5%	5.5%	1.0%	8.7%	1.4%	7.1%	1.5%	2.6%
Tesco, High Road, Tottenham	0.1%	0.0%	4.5%	8.9%	0.0%	1.2%	0.0%	0.0%
Lidl, Tottenham Hale Retail Park	0.4%	0.0%	9.4%	9.7%	0.4%	2.5%	1.2%	0.0%
Other main stores, Zone 4	0.8%	0.5%	4.3%	10.4%	0.2%	5.4%	4.3%	1.7%
Other Zone 4	0.6%	0.0%	2.4%	10.1%	0.2%	1.7%	0.2%	0.8%
Sub-total	**2.4%**	**6.0%**	**21.6%**	**47.8%**	**2.2%**	**17.9%**	**7.2%**	**5.1%**
LB Haringey total	**79.6%**	**74.1%**	**84.4%**	**73.7%**	**15.3%**	**27.3%**	**20.7%**	**19.1%**
LB Barnet	7.2%	12.6%	0.4%	1.6%	0.7%	0.2%	1.2%	25.4%
LB Camden	0.0%	0.2%	0.6%	0.0%	12.2%	0.5%	0.0%	0.3%
LB Enfield	7.9%	5.1%	10.5%	8.1%	1.6%	0.8%	73.7%	52.0%
LB Hackney	2.4%	0.7%	2.6%	9.5%	0.5%	54.2%	0.9%	0.8%
LB Islington	0.1%	7.3%	1.5%	6.5%	68.7%	6.9%	0.0%	1.8%
LB Waltham Forest	2.5%	0.0%	0.0%	0.6%	0.7%	4.5%	2.6%	0.6%
Other	0.3%	0.0%	0.0%	0.0%	0.3%	5.6%	0.9%	0.0%
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: NEMS Household Survey July 2021 and Lichfields' analysis.

Table 5 - Base year 2021 convenience goods expendiiture patterns by zone (%)

Location / Zone	1	2	3	4	5	6	7	8	Total
Expenditure 2021	118.14	162.65	144.87	139.41	118.98	88.05	73.45	133.66	**979.21**
Zone 1 - Haringey North West									
Morrison's, Wood Green	28.00	1.95	10.72	3.07	0.59	0.00	2.28	3.34	49.95
Sainsbury's, Wood Green	11.11	1.79	4.06	5.44	0.00	0.62	0.00	0.53	23.54
Lidl, Wood Green	7.80	0.81	4.35	1.53	0.00	0.00	0.00	2.14	16.63
Other main stores, Zone 1	14.41	2.11	6.81	4.46	0.59	2.11	0.37	8.15	39.03
Other Zone 1	11.46	0.81	2.32	0.42	0.00	0.00	0.15	0.53	15.69
Sub-total	**72.77**	**7.48**	**28.25**	**14.92**	**1.19**	**2.73**	**2.79**	**14.70**	**144.84**
Zone 2 - Haringey South West									
Sainsbury's, Muswell Hill	2.60	19.52	0.72	1.53	0.00	0.79	0.00	0.53	25.70
Sainsbury's, Hornsey High Street	1.65	27.33	0.87	2.23	0.00	0.00	0.15	0.53	32.76
Other main stores, Zone 2	4.96	43.43	1.45	2.23	7.50	0.88	0.37	0.67	61.48
Other Zone 2	1.42	9.27	0.29	1.39	6.90	0.18	0.00	0.00	19.45
Sub-total	**10.63**	**99.54**	**3.33**	**7.39**	**14.40**	**1.85**	**0.51**	**1.74**	**139.39**
Zone 3 - Haringey North East									
Asda, Bruce Grove	0.83	0.65	12.60	3.21	0.00	2.38	0.37	0.27	20.30
Aldi, Bruce Grove	1.30	0.00	13.04	2.93	0.00	0.44	0.07	0.13	17.91
Sainsbury's, Northumberland Park	1.54	1.46	16.37	2.79	0.00	0.00	5.44	1.07	28.66
Other main stores, Zone 3	3.43	1.63	11.44	4.74	0.00	0.88	0.73	0.80	23.65
Other Zone 3	0.71	0.00	5.94	0.14	0.00	0.00	0.00	0.00	6.79
Sub-total	**7.80**	**3.74**	**59.40**	**13.80**	**0.00**	**3.70**	**6.61**	**2.27**	**97.32**
Zone 4 - Haringey South East									
Sainsbury's, Green Lanes	0.59	8.95	1.45	12.13	1.67	6.25	1.10	3.48	35.61
Tesco, High Road, Tottenham	0.12	0.00	6.52	12.41	0.00	1.06	0.00	0.00	20.10
Lidl, Tottenham Hale Retail Park	0.47	0.00	13.62	13.52	0.48	2.20	0.88	0.00	31.17
Other main stores, Zone 4	0.95	0.81	6.23	14.50	0.24	4.75	3.16	2.27	32.91
Other Zone 4	0.71	0.00	3.48	14.08	0.24	1.50	0.15	1.07	21.22
Sub-total	**2.84**	**9.76**	**31.29**	**66.64**	**2.62**	**15.76**	**5.29**	**6.82**	**141.01**
LB Haringey total	**94.04**	**120.53**	**122.27**	**102.74**	**18.20**	**24.04**	**15.20**	**25.53**	**522.55**
LB Barnet	8.51	20.49	0.58	2.23	0.83	0.18	0.88	33.95	67.65
LB Camden	0.00	0.33	0.87	0.00	14.52	0.44	0.00	0.40	16.55
LB Enfield	9.33	8.30	15.21	11.29	1.90	0.70	54.13	69.50	170.38
LB Hackney	2.84	1.14	3.77	13.24	0.59	47.72	0.66	1.07	71.03
LB Islington	0.12	11.87	2.17	9.06	81.74	6.08	0.00	2.41	113.44
LB Waltham Forest	2.95	0.00	0.00	0.84	0.83	3.96	1.91	0.80	11.30
Other	0.35	0.00	0.00	0.00	0.36	4.93	0.66	0.00	6.30
TOTAL	**118.14**	**162.65**	**144.87**	**139.41**	**118.98**	**88.05**	**73.45**	**133.66**	**979.21**

Source: Tables 3 and 4

Table 6 - Future 2023 convenience goods expendiiture patterns by zone (%)

Location / Zone	1	2	3	4	5	6	7	8	Total
Expenditure 2023	120.22	161.66	149.51	140.05	116.99	89.64	77.43	132.42	**987.91**
Zone 1 - Haringey North West									
Morrison's, Wood Green	28.49	1.94	11.06	3.08	0.58	0.00	2.40	3.31	50.87
Sainsbury's, Wood Green	11.30	1.78	4.19	5.46	0.00	0.63	0.00	0.53	23.88
Lidl, Wood Green	7.93	0.81	4.49	1.54	0.00	0.00	0.00	2.12	16.89
Other main stores, Zone 1	14.67	2.10	7.03	4.48	0.58	2.15	0.39	8.08	39.48
Other Zone 1	11.66	0.81	2.39	0.42	0.00	0.00	0.15	0.53	15.97
Sub-total	**74.06**	**7.44**	**29.15**	**14.98**	**1.17**	**2.78**	**2.94**	**14.57**	**147.09**
Zone 2 - Haringey South West									
Sainsbury's, Muswell Hill	2.64	19.40	0.75	1.54	0.00	0.81	0.00	0.53	25.67
Sainsbury's, Hornsey High Street	1.68	27.16	0.90	2.24	0.00	0.00	0.15	0.53	32.66
Other main stores, Zone 2	5.05	43.16	1.50	2.24	7.37	0.90	0.39	0.66	61.26
Other Zone 2	1.44	9.21	0.30	1.40	6.79	0.18	0.00	0.00	19.32
Sub-total	**10.82**	**98.94**	**3.44**	**7.42**	**14.16**	**1.88**	**0.54**	**1.72**	**138.92**
Zone 3 - Haringey North East									
Asda, Bruce Grove	0.84	0.65	13.01	3.22	0.00	2.42	0.39	0.26	20.79
Aldi, Bruce Grove	1.32	0.00	13.46	2.94	0.00	0.45	0.08	0.13	18.38
Sainsbury's, Northumberland Park	1.56	1.45	16.89	2.80	0.00	0.00	5.73	1.06	29.50
Other main stores, Zone 3	3.49	1.62	11.81	4.76	0.00	0.90	0.77	0.79	24.14
Other Zone 3	0.72	0.00	6.13	0.14	0.00	0.00	0.00	0.00	6.99
Sub-total	**7.93**	**3.72**	**61.30**	**13.86**	**0.00**	**3.76**	**6.97**	**2.25**	**99.80**
Zone 4 - Haringey South East									
Sainsbury's, Green Lanes	0.60	8.89	1.50	12.18	1.64	6.36	1.16	3.44	35.78
Tesco, High Road, Tottenham	0.12	0.00	6.73	12.46	0.00	1.08	0.00	0.00	20.39
Lidl, Tottenham Hale Retail Park	0.48	0.00	14.05	13.58	0.47	2.24	0.93	0.00	31.76
Other main stores, Zone 4	0.96	0.81	6.43	14.56	0.23	4.84	3.33	2.25	33.42
Other Zone 4	0.72	0.00	3.59	14.14	0.23	1.52	0.15	1.06	21.43
Sub-total	**2.89**	**9.70**	**32.29**	**66.94**	**2.57**	**16.04**	**5.58**	**6.75**	**142.77**
LB Haringey total	**95.70**	**119.79**	**126.19**	**103.21**	**17.90**	**24.47**	**16.03**	**25.29**	**528.58**
LB Barnet	8.66	20.37	0.60	2.24	0.82	0.18	0.93	33.63	67.42
LB Camden	0.00	0.32	0.90	0.00	14.27	0.45	0.00	0.40	16.34
LB Enfield	9.50	8.24	15.70	11.34	1.87	0.72	57.07	68.86	173.30
LB Hackney	2.89	1.13	3.89	13.30	0.58	48.58	0.70	1.06	72.13
LB Islington	0.12	11.80	2.24	9.10	80.37	6.18	0.00	2.38	112.21
LB Waltham Forest	3.01	0.00	0.00	0.84	0.82	4.03	2.01	0.79	11.51
Other	0.36	0.00	0.00	0.00	0.35	5.02	0.70	0.00	6.43
TOTAL	**120.22**	**161.66**	**149.51**	**140.05**	**116.99**	**89.64**	**77.43**	**132.42**	**987.91**

Source: Tables 3 and 4

Table 7 - Future 2028 convenience goods expendiiture patterns by zone (%)

Location / Zone	1	2	3	4	5	6	7	8	Total
Expenditure 2028	122.55	156.57	157.06	142.08	114.61	91.32	92.41	130.19	**1,006.78**
Zone 1 - Haringey North West									
Morrison's, Wood Green	29.04	1.88	11.62	3.13	0.57	0.00	2.86	3.25	52.36
Sainsbury's, Wood Green	11.52	1.72	4.40	5.54	0.00	0.64	0.00	0.52	24.34
Lidl, Wood Green	8.09	0.78	4.71	1.56	0.00	0.00	0.00	2.08	17.23
Other main stores, Zone 1	14.95	2.04	7.38	4.55	0.57	2.19	0.46	7.94	40.08
Other Zone 1	11.89	0.78	2.51	0.43	0.00	0.00	0.18	0.52	16.31
Sub-total	**75.49**	**7.20**	**30.63**	**15.20**	**1.15**	**2.83**	**3.51**	**14.32**	**150.33**
Zone 2 - Haringey South West									
Sainsbury's, Muswell Hill	2.70	18.79	0.79	1.56	0.00	0.82	0.00	0.52	25.17
Sainsbury's, Hornsey High Street	1.72	26.30	0.94	2.27	0.00	0.00	0.18	0.52	31.94
Other main stores, Zone 2	5.15	41.80	1.57	2.27	7.22	0.91	0.46	0.65	60.04
Other Zone 2	1.47	8.92	0.31	1.42	6.65	0.18	0.00	0.00	18.96
Sub-total	**11.03**	**95.82**	**3.61**	**7.53**	**13.87**	**1.92**	**0.65**	**1.69**	**136.12**
Zone 3 - Haringey North East									
Asda, Bruce Grove	0.86	0.63	13.66	3.27	0.00	2.47	0.46	0.26	21.60
Aldi, Bruce Grove	1.35	0.00	14.14	2.98	0.00	0.46	0.09	0.13	19.15
Sainsbury's, Northumberland Park	1.59	1.41	17.75	2.84	0.00	0.00	6.84	1.04	31.47
Other main stores, Zone 3	3.55	1.57	12.41	4.83	0.00	0.91	0.92	0.78	24.98
Other Zone 3	0.74	0.00	6.44	0.14	0.00	0.00	0.00	0.00	7.32
Sub-total	**8.09**	**3.60**	**64.39**	**14.07**	**0.00**	**3.84**	**8.32**	**2.21**	**104.52**
Zone 4 - Haringey South East									
Sainsbury's, Green Lanes	0.61	8.61	1.57	12.36	1.60	6.48	1.39	3.38	36.01
Tesco, High Road, Tottenham	0.12	0.00	7.07	12.65	0.00	1.10	0.00	0.00	20.93
Lidl, Tottenham Hale Retail Park	0.49	0.00	14.76	13.78	0.46	2.28	1.11	0.00	32.89
Other main stores, Zone 4	0.98	0.78	6.75	14.78	0.23	4.93	3.97	2.21	34.64
Other Zone 4	0.74	0.00	3.77	14.35	0.23	1.55	0.18	1.04	21.86
Sub-total	**2.94**	**9.39**	**33.92**	**67.92**	**2.52**	**16.35**	**6.65**	**6.64**	**146.34**
LB Haringey total	**97.55**	**116.02**	**132.56**	**104.72**	**17.53**	**24.93**	**19.13**	**24.87**	**537.30**
LB Barnet	8.82	19.73	0.63	2.27	0.80	0.18	1.11	33.07	66.61
LB Camden	0.00	0.31	0.94	0.00	13.98	0.46	0.00	0.39	16.08
LB Enfield	9.68	7.98	16.49	11.51	1.83	0.73	68.10	67.70	184.03
LB Hackney	2.94	1.10	4.08	13.50	0.57	49.50	0.83	1.04	73.56
LB Islington	0.12	11.43	2.36	9.24	78.73	6.30	0.00	2.34	110.52
LB Waltham Forest	3.06	0.00	0.00	0.85	0.80	4.11	2.40	0.78	12.01
Other	0.37	0.00	0.00	0.00	0.34	5.11	0.83	0.00	6.66
TOTAL	**122.55**	**156.57**	**157.06**	**142.08**	**114.61**	**91.32**	**92.41**	**130.19**	**1,006.78**

Source: Tables 3 and 4

Table 8 - Future 2033 convenience goods expendiiture patterns by zone (%)

Location / Zone	1	2	3	4	5	6	7	8	Total
Expenditure 2033	126.08	156.08	163.44	145.18	116.69	95.07	96.59	132.64	**1,031.77**
Zone 1 - Haringey North West									
Morrison's, Wood Green	29.88	1.87	12.09	3.19	0.58	0.00	2.99	3.32	53.94
Sainsbury's, Wood Green	11.85	1.72	4.58	5.66	0.00	0.67	0.00	0.53	25.00
Lidl, Wood Green	8.32	0.78	4.90	1.60	0.00	0.00	0.00	2.12	17.72
Other main stores, Zone 1	15.38	2.03	7.68	4.65	0.58	2.28	0.48	8.09	41.18
Other Zone 1	12.23	0.78	2.62	0.44	0.00	0.00	0.19	0.53	16.78
Sub-total	**77.67**	**7.18**	**31.87**	**15.53**	**1.17**	**2.95**	**3.67**	**14.59**	**154.63**
Zone 2 - Haringey South West									
Sainsbury's, Muswell Hill	2.77	18.73	0.82	1.60	0.00	0.86	0.00	0.53	25.30
Sainsbury's, Hornsey High Street	1.77	26.22	0.98	2.32	0.00	0.00	0.19	0.53	32.01
Other main stores, Zone 2	5.30	41.67	1.63	2.32	7.35	0.95	0.48	0.66	60.37
Other Zone 2	1.51	8.90	0.33	1.45	6.77	0.19	0.00	0.00	19.15
Sub-total	**11.35**	**95.52**	**3.76**	**7.69**	**14.12**	**2.00**	**0.68**	**1.72**	**136.84**
Zone 3 - Haringey North East									
Asda, Bruce Grove	0.88	0.62	14.22	3.34	0.00	2.57	0.48	0.27	22.38
Aldi, Bruce Grove	1.39	0.00	14.71	3.05	0.00	0.48	0.10	0.13	19.85
Sainsbury's, Northumberland Park	1.64	1.40	18.47	2.90	0.00	0.00	7.15	1.06	32.62
Other main stores, Zone 3	3.66	1.56	12.91	4.94	0.00	0.95	0.97	0.80	25.78
Other Zone 3	0.76	0.00	6.70	0.15	0.00	0.00	0.00	0.00	7.60
Sub-total	**8.32**	**3.59**	**67.01**	**14.37**	**0.00**	**3.99**	**8.69**	**2.25**	**108.24**
Zone 4 - Haringey South East									
Sainsbury's, Green Lanes	0.63	8.58	1.63	12.63	1.63	6.75	1.45	3.45	36.76
Tesco, High Road, Tottenham	0.13	0.00	7.35	12.92	0.00	1.14	0.00	0.00	21.54
Lidl, Tottenham Hale Retail Park	0.50	0.00	15.36	14.08	0.47	2.38	1.16	0.00	33.95
Other main stores, Zone 4	1.01	0.78	7.03	15.10	0.23	5.13	4.15	2.25	35.69
Other Zone 4	0.76	0.00	3.92	14.66	0.23	1.62	0.19	1.06	22.45
Sub-total	**3.03**	**9.36**	**35.30**	**69.40**	**2.57**	**17.02**	**6.95**	**6.76**	**150.40**
LB Haringey total	**100.36**	**115.65**	**137.94**	**107.00**	**17.85**	**25.95**	**19.99**	**25.33**	**550.10**
LB Barnet	9.08	19.67	0.65	2.32	0.82	0.19	1.16	33.69	67.58
LB Camden	0.00	0.31	0.98	0.00	14.24	0.48	0.00	0.40	16.40
LB Enfield	9.96	7.96	17.16	11.76	1.87	0.76	71.18	68.97	189.63
LB Hackney	3.03	1.09	4.25	13.79	0.58	51.53	0.87	1.06	76.20
LB Islington	0.13	11.39	2.45	9.44	80.16	6.56	0.00	2.39	112.52
LB Waltham Forest	3.15	0.00	0.00	0.87	0.82	4.28	2.51	0.80	12.43
Other	0.38	0.00	0.00	0.00	0.35	5.32	0.87	0.00	6.92
TOTAL	**126.08**	**156.08**	**163.44**	**145.18**	**116.69**	**95.07**	**96.59**	**132.64**	**1,031.77**

Source: Tables 3 and 4

Table 9 - Future 2038 convenience goods expendiiture patterns by zone (%)

Location / Zone	1	2	3	4	5	6	7	8	Total
Expenditure 2038	130.45	158.79	167.60	150.42	120.42	100.30	97.51	136.48	**1,061.97**
Zone 1 - Haringey North West									
Morrison's, Wood Green	30.92	1.91	12.40	3.31	0.60	0.00	3.02	3.41	55.57
Sainsbury's, Wood Green	12.26	1.75	4.69	5.87	0.00	0.70	0.00	0.55	25.82
Lidl, Wood Green	8.61	0.79	5.03	1.65	0.00	0.00	0.00	2.18	18.27
Other main stores, Zone 1	15.91	2.06	7.88	4.81	0.60	2.41	0.49	8.32	42.49
Other Zone 1	12.65	0.79	2.68	0.45	0.00	0.00	0.20	0.55	17.32
Sub-total	**80.36**	**7.30**	**32.68**	**16.09**	**1.20**	**3.11**	**3.71**	**15.01**	**159.47**
Zone 2 - Haringey South West									
Sainsbury's, Muswell Hill	2.87	19.05	0.84	1.65	0.00	0.90	0.00	0.55	25.87
Sainsbury's, Hornsey High Street	1.83	26.68	1.01	2.41	0.00	0.00	0.20	0.55	32.66
Other main stores, Zone 2	5.48	42.40	1.68	2.41	7.59	1.00	0.49	0.68	61.72
Other Zone 2	1.57	9.05	0.34	1.50	6.98	0.20	0.00	0.00	19.64
Sub-total	**11.74**	**97.18**	**3.85**	**7.97**	**14.57**	**2.11**	**0.68**	**1.77**	**139.88**
Zone 3 - Haringey North East									
Asda, Bruce Grove	0.91	0.64	14.58	3.46	0.00	2.71	0.49	0.27	23.06
Aldi, Bruce Grove	1.43	0.00	15.08	3.16	0.00	0.50	0.10	0.14	20.41
Sainsbury's, Northumberland Park	1.70	1.43	18.94	3.01	0.00	0.00	7.22	1.09	33.38
Other main stores, Zone 3	3.78	1.59	13.24	5.11	0.00	1.00	0.98	0.82	26.52
Other Zone 3	0.78	0.00	6.87	0.15	0.00	0.00	0.00	0.00	7.80
Sub-total	**8.61**	**3.65**	**68.72**	**14.89**	**0.00**	**4.21**	**8.78**	**2.32**	**111.18**
Zone 4 - Haringey South East									
Sainsbury's, Green Lanes	0.65	8.73	1.68	13.09	1.69	7.12	1.46	3.55	37.97
Tesco, High Road, Tottenham	0.13	0.00	7.54	13.39	0.00	1.20	0.00	0.00	22.26
Lidl, Tottenham Hale Retail Park	0.52	0.00	15.75	14.59	0.48	2.51	1.17	0.00	35.03
Other main stores, Zone 4	1.04	0.79	7.21	15.64	0.24	5.42	4.19	2.32	36.86
Other Zone 4	0.78	0.00	4.02	15.19	0.24	1.71	0.20	1.09	23.23
Sub-total	**3.13**	**9.53**	**36.20**	**71.90**	**2.65**	**17.95**	**7.02**	**6.96**	**155.34**
LB Haringey total	**103.84**	**117.66**	**141.46**	**110.86**	**18.42**	**27.38**	**20.19**	**26.07**	**565.87**
LB Barnet	9.39	20.01	0.67	2.41	0.84	0.20	1.17	34.66	69.35
LB Camden	0.00	0.32	1.01	0.00	14.69	0.50	0.00	0.41	16.93
LB Enfield	10.31	8.10	17.60	12.18	1.93	0.80	71.87	70.97	193.75
LB Hackney	3.13	1.11	4.36	14.29	0.60	54.36	0.88	1.09	79.82
LB Islington	0.13	11.59	2.51	9.78	82.73	6.92	0.00	2.46	116.12
LB Waltham Forest	3.26	0.00	0.00	0.90	0.84	4.51	2.54	0.82	12.87
Other	0.39	0.00	0.00	0.00	0.36	5.62	0.88	0.00	7.25
TOTAL	**130.45**	**158.79**	**167.60**	**150.42**	**120.42**	**100.30**	**97.51**	**136.48**	**1,061.97**

Source: Tables 3 and 4

Table 10 - Convenience goods floorspace and benchmark turnover in LB Haringey

Zone / Store	Sales floorspace (sq.m net)	Convenience goods floorspace (%)	Convenience goods floorspace (sq.m net)	Turnover (£ per sq.m)	Total turnover (£m)
Zone 1 - Haringey North West					
Morrison's, High Road, Wood Green	2,711	85%	2,304	£12,656	£29.16
Sainsbury's, High Road, Wood Green	1,315	90%	1,184	£11,691	£13.84
Lidl, High Road, Wood Green	1,246	80%	997	£10,103	£10.07
Iceland, Mayes Road, Wood Green	420	98%	411	£6,859	£2.82
Tesco Express, High Road, Wood Green	228	95%	217	£13,797	£2.99
Sainsbury's Local, Hollywood Green, Wood Green	228	95%	217	£11,691	£2.53
Other Wood Green	2,100	100%	2,100	£7,000	£14.70
Tesco Express, High Road North, Wood Green	253	95%	240	£13,797	£3.32
Tesco Express, Bounds Green	298	95%	283	£13,797	£3.91
Tesco Express, Lordship Lane	280	95%	266	£13,797	£3.67
M&S Simply Food, Pinkham Way	84	95%	80	£10,476	£0.84
Other in Zone 1 local centres	3,100	100%	3,100	£7,000	£21.70
Sub Total	**12,263**		**11,399**		**£109.55**
Zone 2 - Haringey South West					
Co-op, Crouch End	943	90%	849	£10,824	£9.19
M&S Simply Food, Crouch End	462	95%	439	£10,476	£4.60
Little Waitrose, Crouch End	579	95%	550	£12,940	£7.12
Tesco Express, Crouch End	193	95%	183	£13,797	£2.53
Other Crouch End	1,000	100%	1,000	£7,000	£7.00
Sainsbury's,Fortis Green Road, Muswell Hill	1,323	90%	1,191	£11,691	£13.92
M&S Simply Food, Muswell Hill	768	95%	730	£10,476	£7.64
Little Waitrose, Muswell Hill	338	95%	321	£12,940	£4.16
Planet Organic, Muswell Hill	395	95%	375	£8,000	£3.00
Other Muswell Hill	900	100%	900	£7,000	£6.30
Sainsbury's, Smithfield Sq, Hornsey High Street	3,303	85%	2,808	£11,691	£32.82
Tesco Express, Hornsey High Street	239	95%	227	£13,797	£3.13
Co-op, Tottenham Lane, Hornsey	84	95%	80	£10,824	£0.86
Sainsbury's Local, Archway Road	161	95%	153	£11,691	£1.79
Budgen, Colney Hatch Lane	288	95%	274	£8,354	£2.29
Other in Zone 2 local centres	1,900	100%	1,900	£7,000	£13.30
Sub-Total	**12,876**		**11,979**		**£119.65**
Zone 3 - Haringey North East					
Aldi, Tottenham High Road, Bruce Grove	888	85%	755	£10,827	£8.17
Asda, Tottenham High Road, Bruce Grove	1,251	85%	1,063	£13,659	£14.52
Iceland, Tottenham High Road, Bruce Grove	521	98%	511	£6,859	£3.50
Other Bruce Grove/Tottenham High Road	1,500	100%	1,500	£7,000	£10.50
Sainsbury's Local, Lordship Lane	305	95%	290	£11,691	£3.39
Tesco Express, Hale Village	250	95%	238	£13,659	£3.24
Sainsbury's, Northumberland Park	4,704	75%	3,528	£11,691	£41.25
Sainsbury's Local, 669/673 High Road	154	95%	146	£11,691	£1.71
B&M Home Store, High Road	1,633	20%	327	£2,319	£0.76
Asda (forecourt), White Hart Lane	84	95%	80	£13,659	£1.09
Other in Zone 3 local centres	1,800	100%	1,800	£7,000	£12.60
Sub-Total	**13,090**		**10,237**		**£100.73**
Zone 4 - Haringey South East					
Iceland, Green Lanes	500	98%	490	£6,859	£3.36
Sainsbury's,Williamson Road, Green Lanes	4,935	70%	3,455	£11,691	£40.39
Tesco Express, Salisbury Road, Green Lanes	264	95%	251	£13,797	£3.46
Other Green Lanes	1,100	100%	1,100	£7,000	£7.70
Tesco, High Road, Tottenham	2,766	85%	2,351	£13,797	£32.44
Sainsbury's Local, 3/7 West Green Road	294	95%	279	£11,691	£3.27
Other West Green Road/Seven Sisters	3,300	*100%*	*3,300*	*£7,000*	*£23.10*
Tesco Express, West Green Road	239	95%	227	£13,797	£3.13
Sainsbury's Local, 333/337 West Green Road	171	95%	162	£11,691	£1.90
Lidl, Seven Sisters Road, Finsbury Park	464	85%	394	£10,103	£3.98
Lidl, Tottenham Hale Retail Park	767	85%	652	£10,103	£6.59
Iceland, Tottenham Hale Retail Park	452	98%	443	£6,859	£3.04
Other in Zone 3 local centres	1,500	100%	1,500	£7,000	£10.50
Sub Total	**16,752**		**14,605**		**£142.85**
	54,981		**48,219**		**£472.78**

Source: *LB Haringey land uses survey 2020 and Lichfields' survey of local centres (June 2021)*

Table 11 - Summary of convenience goods expenditure 2021 to 2038 (£M)

Area	2021	2023	2028	2033	2038
Available expenditure					
Zone 1 - North West Haringey	144.84	147.09	150.33	154.63	159.47
Zone 2 - South West Haringey	139.39	138.92	136.12	136.84	139.88
Zone 3 - North East Haringey	97.32	99.80	104.52	108.24	111.18
Zone 4 -South East Haringey	141.01	142.77	146.34	150.40	155.34
Total	**522.55**	**528.58**	**537.30**	**550.10**	**565.87**
Turnover of existing facilities					
Zone 1 - North West Haringey	144.84	144.84	144.84	144.84	144.84
Zone 2 - South West Haringey	139.39	139.39	139.39	139.39	139.39
Zone 3 - North East Haringey	97.32	97.32	97.32	97.32	97.32
Zone 4 -South East Haringey	141.01	141.01	141.01	141.01	141.01
Total	**522.55**	**522.55**	**522.55**	**522.55**	**522.55**
Surplus/deficit expenditure £M					
Zone 1 - North West Haringey	0.00	2.25	5.50	9.79	14.63
Zone 2 - South West Haringey	0.00	-0.48	-3.28	-2.56	0.48
Zone 3 - North East Haringey	0.00	2.48	7.20	10.92	13.86
Zone 4 -South East Haringey	0.00	1.76	5.33	9.39	14.34
Total	**0.00**	**6.02**	**14.75**	**27.54**	**43.32**

Source: Tables 5 to 9

Table 12 - Convenience goods floorspace capacity up to 2038 (cumulative)

	2021	2023	2028	2033	2038
Turnover density new floorspace (£ per sq.m)	£12,000	£12,000	£12,000	£12,000	£12,000
Floorspace projection (sq.m net)					
Zone 1 - North West Haringey	0	188	458	816	1,219
Zone 2 - South West Haringey	0	-40	-273	-213	40
Zone 3 - North East Haringey	0	207	600	910	1,155
Zone 4 -South East Haringey	0	147	444	782	1,195
Total	**0**	**502**	**1,229**	**2,295**	**3,610**
Floorspace Projection (sq.m gross)					
Zone 1 - North West Haringey	0	268	654	1,166	1,742
Zone 2 - South West Haringey	0	-57	-390	-304	58
Zone 3 - North East Haringey	0	296	857	1,300	1,650
Zone 4 -South East Haringey	0	210	635	1,118	1,707
Total	**0**	**717**	**1,755**	**3,279**	**5,157**

Source: Table 11

Appendix 3 Comparison goods assessment

Table 1 - Study area population projections

Zone	2019	2021	2023	2028	2033	2038
1 - Haringey North West	56,704	57,489	58,588	60,221	61,927	63,945
2 - Haringey South West	62,943	62,272	61,962	60,521	60,285	61,237
3 - Haringey North East	77,740	79,995	82,648	87,547	91,054	93,216
4 - Haringey South East	71,274	71,308	71,745	73,391	74,953	77,534
5 - Archway	53,022	52,855	52,043	51,416	52,303	53,905
6 - Stamford Hill	48,386	49,464	50,414	51,798	53,893	56,731
7 - Edmonton	38,398	40,965	43,235	52,031	54,354	54,783
8 - Southgate/Palmers Green	62,438	61,967	61,474	60,949	62,068	63,744
Total	**470,905**	**476,314**	**482,108**	**497,872**	**510,837**	**525,095**

Sources: Experian popluation for zones at 2019 and GLA ward level population projections - housing led 2018-based

Table 2 - Comparison goods expenditure per person per annum (£)

Zone	2021	2023	2028	2033	2038
1 - Haringey North West	2,533	2,660	2,960	3,345	3,817
2 - Haringey South West	3,721	3,907	4,348	4,914	5,607
3 - Haringey North East	1,889	1,984	2,208	2,495	2,846
4 - Haringey South East	2,239	2,351	2,616	2,957	3,374
5 - Archway	2,844	2,986	3,323	3,756	4,285
6 - Stamford Hill	1,990	2,090	2,326	2,629	2,999
7 - Edmonton	1,880	1,974	2,197	2,483	2,833
8 - Southgate/Palmers Green	3,015	3,165	3,523	3,981	4,542

Sources:
Experian Local Expenditure 2019 (2019 prices)
Experian growth rates - Retail Planner Breifing Note 18 (October 2020)
Excludes Special Forms of Trading (SFT)

Table 3 - Total comparison goods expenditure (£m)

Zone	2021	2023	2028	2033	2038
1 - Haringey North West	145.62	155.84	178.25	207.17	244.08
2 - Haringey South West	231.71	242.09	263.14	296.26	343.35
3 - Haringey North East	151.11	163.97	193.30	227.17	265.29
4 - Haringey South East	159.66	168.67	191.99	221.63	261.60
5 - Archway	150.32	155.40	170.86	196.45	230.98
6 - Stamford Hill	98.43	105.36	120.48	141.67	170.14
7 - Edmonton	77.01	85.35	114.31	134.95	155.20
8 - Southgate/Palmers Green	186.83	194.57	214.72	247.12	289.52
Total	**1,200.70**	**1,271.25**	**1,447.06**	**1,672.44**	**1,960.17**

Source: Tables 1 and 2

Table 4 - Base year 2021 comparison goods market shares by zone (%)

Location / Zone	1	2	3	4	5	6	7	8
Zone 1 - Haringey North West								
Wood Green	41.7%	9.4%	24.0%	16.1%	5.1%	7.9%	8.5%	5.9%
Other Zone 1	1.9%	1.8%	0.6%	1.0%	0.7%	0.2%	0.2%	0.6%
Sub-total	**43.6%**	**11.2%**	**24.6%**	**17.1%**	**5.8%**	**8.1%**	**8.7%**	**6.5%**
Zone 2 - Haringey South West								
Crouch End	1.0%	9.4%	0.4%	2.9%	2.7%	0.1%	0.5%	0.5%
Muswell Hill	2.8%	8.0%	0.8%	0.6%	0.3%	0.0%	0.4%	2.2%
Other Zone 2	0.5%	6.0%	0.7%	1.3%	2.3%	0.4%	0.0%	0.3%
Sub-total	**4.3%**	**23.4%**	**1.9%**	**4.8%**	**5.3%**	**0.5%**	**0.9%**	**3.0%**
Zone 3 - Haringey North East								
Bruce Grove/Tottenham High Road	0.1%	0.1%	2.6%	2.0%	0.0%	1.6%	0.2%	1.7%
Other Zone 3	1.7%	0.0%	9.0%	2.2%	0.0%	0.7%	1.4%	0.3%
Sub-total	**1.8%**	**0.1%**	**11.6%**	**4.2%**	**0.0%**	**2.3%**	**1.6%**	**2.0%**
Zone 4 - Haringey South East								
Green Lanes	1.6%	4.8%	2.1%	12.1%	1.5%	10.0%	0.6%	2.2%
West Grreen/Seeven Sisters	0.2%	0.1%	1.8%	1.4%	1.7%	0.3%	0.6%	0.1%
Tottenham Hale Retail Park	7.4%	4.1%	21.6%	17.6%	2.4%	16.2%	7.2%	1.1%
Other Zone 4	0.2%	0.1%	0.1%	0.8%	0.0%	0.0%	0.2%	0.0%
Sub-total	**9.4%**	**9.1%**	**25.6%**	**31.9%**	**5.6%**	**26.5%**	**8.6%**	**3.4%**
LB Haringey total	**59.1%**	**43.8%**	**63.7%**	**58.0%**	**16.7%**	**37.4%**	**19.8%**	**14.9%**
LB Barnet	14.6%	22.8%	3.2%	4.9%	16.7%	5.0%	3.1%	31.8%
LB Camden	0.4%	2.7%	0.2%	0.5%	11.0%	0.3%	0.0%	0.2%
LB Enfield	8.8%	5.8%	14.8%	13.1%	2.9%	6.0%	53.3%	32.7%
LB Hackney	1.0%	0.9%	1.2%	2.4%	0.1%	25.9%	1.8%	0.9%
LB Islington	0.6%	3.2%	0.6%	1.9%	24.6%	3.9%	0.6%	0.4%
LB Waltham Forest	1.6%	0.8%	3.2%	1.2%	0.3%	2.7%	5.1%	1.4%
Central London	8.2%	17.0%	6.7%	11.9%	19.4%	10.1%	4.5%	7.2%
Other	5.7%	3.0%	6.4%	6.1%	8.3%	8.7%	11.8%	10.5%
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: NEMS Household Survey July 2021 and Lichfields' analysis.

Table 5 - Base year 2021 comparsion goods expendiiture patterns by zone (%)

Location / Zone	1	2	3	4	5	6	7	8	Total
Expenditure 2021	145.62	231.71	151.11	159.66	150.32	98.43	77.01	186.83	**1,200.70**
Zone 1 - Haringey North West									
Wood Green	60.72	21.78	36.27	25.71	7.67	7.78	6.55	11.02	177.49
Other Zone 1	2.77	4.17	0.91	1.60	1.05	0.20	0.15	1.12	11.96
Sub-total	**63.49**	**25.95**	**37.17**	**27.30**	**8.72**	**7.97**	**6.70**	**12.14**	**189.45**
Zone 2 - Haringey South West									
Crouch End	1.46	21.78	0.60	4.63	4.06	0.10	0.39	0.93	33.95
Muswell Hill	4.08	18.54	1.21	0.96	0.45	0.00	0.31	4.11	29.65
Other Zone 2	0.73	13.90	1.06	2.08	3.46	0.39	0.00	0.56	22.18
Sub-total	**6.26**	**54.22**	**2.87**	**7.66**	**7.97**	**0.49**	**0.69**	**5.60**	**85.77**
Zone 3 - Haringey North East									
Bruce Grove/Tottenham High Road	0.15	0.23	3.93	3.19	0.00	1.57	0.15	3.18	12.40
Other Zone 3	2.48	0.00	13.60	3.51	0.00	0.69	1.08	0.56	21.92
Sub-total	**2.62**	**0.23**	**17.53**	**6.71**	**0.00**	**2.26**	**1.23**	**3.74**	**34.32**
Zone 4 - Haringey South East									
Green Lanes	2.33	11.12	3.17	19.32	2.25	9.84	0.46	4.11	52.61
West Green/Seven Sisters	0.29	0.23	2.72	2.24	2.56	0.30	0.46	0.19	8.98
Tottenham Hale Retail Park	10.78	9.50	32.64	28.10	3.61	15.95	5.55	2.06	108.17
Other Zone 4	0.29	0.23	0.15	1.28	0.00	0.00	0.15	0.00	2.11
Sub-total	**13.69**	**21.09**	**38.68**	**50.93**	**8.42**	**26.08**	**6.62**	**6.35**	**171.87**
LB Haringey total	**86.06**	**101.49**	**96.26**	**92.60**	**25.10**	**36.81**	**15.25**	**27.84**	**481.41**
LB Barnet	21.26	52.83	4.84	7.82	25.10	4.92	2.39	59.41	178.57
LB Camden	0.58	6.26	0.30	0.80	16.54	0.30	0.00	0.37	25.14
LB Enfield	12.81	13.44	22.36	20.92	4.36	5.91	41.05	61.09	181.94
LB Hackney	1.46	2.09	1.81	3.83	0.15	25.49	1.39	1.68	37.90
LB Islington	0.87	7.41	0.91	3.03	36.98	3.84	0.46	0.75	54.26
LB Waltham Forest	2.33	1.85	4.84	1.92	0.45	2.66	3.93	2.62	20.59
Central London	11.94	39.39	10.12	19.00	29.16	9.94	3.47	13.45	136.48
Other	8.30	6.95	9.67	9.74	12.48	8.56	9.09	19.62	84.41
TOTAL	**145.62**	**231.71**	**151.11**	**159.66**	**150.32**	**98.43**	**77.01**	**186.83**	**1,200.70**

Source: Tables 3 and 4

Table 6 - Future 2023 comparison goods expendiiture patterns by zone (%)

Location / Zone	1	2	3	4	5	6	7	8	Total
Expenditure 2023	155.84	242.09	163.97	168.67	155.40	105.36	85.35	194.57	**1,271.25**
Zone 1 - Haringey North West									
Wood Green	64.99	22.76	39.35	27.16	7.93	8.32	7.25	11.48	189.24
Other Zone 1	2.96	4.36	0.98	1.69	1.09	0.21	0.17	1.17	12.63
Sub-total	**67.95**	**27.11**	**40.34**	**28.84**	**9.01**	**8.53**	**7.43**	**12.65**	**201.86**
Zone 2 - Haringey South West									
Crouch End	1.56	22.76	0.66	4.89	4.20	0.11	0.43	0.97	35.56
Muswell Hill	4.36	19.37	1.31	1.01	0.47	0.00	0.34	4.28	31.14
Other Zone 2	0.78	14.53	1.15	2.19	3.57	0.42	0.00	0.58	23.22
Sub-total	**6.70**	**56.65**	**3.12**	**8.10**	**8.24**	**0.53**	**0.77**	**5.84**	**89.93**
Zone 3 - Haringey North East									
Bruce Grove/Tottenham High Road	0.16	0.24	4.26	3.37	0.00	1.69	0.17	3.31	13.20
Other Zone 3	2.65	0.00	14.76	3.71	0.00	0.74	1.19	0.58	23.63
Sub-total	**2.81**	**0.24**	**19.02**	**7.08**	**0.00**	**2.42**	**1.37**	**3.89**	**36.83**
Zone 4 - Haringey South East									
Green Lanes	2.49	11.62	3.44	20.41	2.33	10.54	0.51	4.28	55.63
West Green/Seven Sisters	0.31	0.24	2.95	2.36	2.64	0.32	0.51	0.19	9.53
Tottenham Hale Retail Park	11.53	9.93	35.42	29.69	3.73	17.07	6.14	2.14	115.65
Other Zone 4	0.31	0.24	0.16	1.35	0.00	0.00	0.17	0.00	2.24
Sub-total	**14.65**	**22.03**	**41.98**	**53.81**	**8.70**	**27.92**	**7.34**	**6.62**	**183.04**
LB Haringey total	**92.10**	**106.03**	**104.45**	**97.83**	**25.95**	**39.41**	**16.90**	**28.99**	**511.67**
LB Barnet	22.75	55.20	5.25	8.26	25.95	5.27	2.65	61.87	187.20
LB Camden	0.62	6.54	0.33	0.84	17.09	0.32	0.00	0.39	26.13
LB Enfield	13.71	14.04	24.27	22.10	4.51	6.32	45.49	63.62	194.06
LB Hackney	1.56	2.18	1.97	4.05	0.16	27.29	1.54	1.75	40.49
LB Islington	0.94	7.75	0.98	3.20	38.23	4.11	0.51	0.78	56.50
LB Waltham Forest	2.49	1.94	5.25	2.02	0.47	2.84	4.35	2.72	22.09
Central London	12.78	41.15	10.99	20.07	30.15	10.64	3.84	14.01	143.63
Other	8.88	7.26	10.49	10.29	12.90	9.17	10.07	20.43	89.49
TOTAL	**155.84**	**242.09**	**163.97**	**168.67**	**155.40**	**105.36**	**85.35**	**194.57**	**1,271.25**

Source: Tables 3 and 4

Table 7 - Future 2028 comparison goods expendiiture patterns by zone (%)

Location / Zone	1	2	3	4	5	6	7	8	Total
Expenditure 2028	178.25	263.14	193.30	191.99	170.86	120.48	114.31	214.72	**1,447.06**
Zone 1 - Haringey North West									
Wood Green	74.33	24.74	46.39	30.91	8.71	9.52	9.72	12.67	216.99
Other Zone 1	3.39	4.74	1.16	1.92	1.20	0.24	0.23	1.29	14.16
Sub-total	**77.72**	**29.47**	**47.55**	**32.83**	**9.91**	**9.76**	**9.95**	**13.96**	**231.14**
Zone 2 - Haringey South West									
Crouch End	1.78	24.74	0.77	5.57	4.61	0.12	0.57	1.07	39.24
Muswell Hill	4.99	21.05	1.55	1.15	0.51	0.00	0.46	4.72	34.43
Other Zone 2	0.89	15.79	1.35	2.50	3.93	0.48	0.00	0.64	25.58
Sub-total	**7.66**	**61.58**	**3.67**	**9.22**	**9.06**	**0.60**	**1.03**	**6.44**	**99.26**
Zone 3 - Haringey North East									
Bruce Grove/Tottenham High Road	0.18	0.26	5.03	3.84	0.00	1.93	0.23	3.65	15.11
Other Zone 3	3.03	0.00	17.40	4.22	0.00	0.84	1.60	0.64	27.74
Sub-total	**3.21**	**0.26**	**22.42**	**8.06**	**0.00**	**2.77**	**1.83**	**4.29**	**42.85**
Zone 4 - Haringey South East									
Green Lanes	2.85	12.63	4.06	23.23	2.56	12.05	0.69	4.72	62.79
West Green/Seven Sisters	0.36	0.26	3.48	2.69	2.90	0.36	0.69	0.21	10.95
Tottenham Hale Retail Park	13.19	10.79	41.75	33.79	4.10	19.52	8.23	2.36	133.73
Other Zone 4	0.36	0.26	0.19	1.54	0.00	0.00	0.23	0.00	2.58
Sub-total	**16.76**	**23.95**	**49.49**	**61.24**	**9.57**	**31.93**	**9.83**	**7.30**	**210.06**
LB Haringey total	**105.35**	**115.26**	**123.13**	**111.35**	**28.53**	**45.06**	**22.63**	**31.99**	**583.31**
LB Barnet	26.02	60.00	6.19	9.41	28.53	6.02	3.54	68.28	208.00
LB Camden	0.71	7.10	0.39	0.96	18.79	0.36	0.00	0.43	28.75
LB Enfield	15.69	15.26	28.61	25.15	4.95	7.23	60.93	70.21	228.03
LB Hackney	1.78	2.37	2.32	4.61	0.17	31.20	2.06	1.93	46.44
LB Islington	1.07	8.42	1.16	3.65	42.03	4.70	0.69	0.86	62.57
LB Waltham Forest	2.85	2.11	6.19	2.30	0.51	3.25	5.83	3.01	26.05
Central London	14.62	44.73	12.95	22.85	33.15	12.17	5.14	15.46	161.07
Other	10.16	7.89	12.37	11.71	14.18	10.48	13.49	22.55	102.84
TOTAL	**178.25**	**263.14**	**193.30**	**191.99**	**170.86**	**120.48**	**114.31**	**214.72**	**1,447.06**

Source: Tables 3 and 4

Table 8 - Future 2033 comparison goods expendiiture patterns by zone (%)

Location / Zone	1	2	3	4	5	6	7	8	Total
Expenditure 2033	207.17	296.26	227.17	221.63	196.45	141.67	134.95	247.12	**1,672.44**
Zone 1 - Haringey North West									
Wood Green	86.39	27.85	54.52	35.68	10.02	11.19	11.47	14.58	251.70
Other Zone 1	3.94	5.33	1.36	2.22	1.38	0.28	0.27	1.48	16.26
Sub-total	**90.33**	**33.18**	**55.88**	**37.90**	**11.39**	**11.48**	**11.74**	**16.06**	**267.96**
Zone 2 - Haringey South West									
Crouch End	2.07	27.85	0.91	6.43	5.30	0.14	0.67	1.24	44.61
Muswell Hill	5.80	23.70	1.82	1.33	0.59	0.00	0.54	5.44	39.21
Other Zone 2	1.04	17.78	1.59	2.88	4.52	0.57	0.00	0.74	29.11
Sub-total	**8.91**	**69.33**	**4.32**	**10.64**	**10.41**	**0.71**	**1.21**	**7.41**	**112.94**
Zone 3 - Haringey North East									
Bruce Grove/Tottenham High Road	0.21	0.30	5.91	4.43	0.00	2.27	0.27	4.20	17.58
Other Zone 3	3.52	0.00	20.45	4.88	0.00	0.99	1.89	0.74	32.47
Sub-total	**3.73**	**0.30**	**26.35**	**9.31**	**0.00**	**3.26**	**2.16**	**4.94**	**50.05**
Zone 4 - Haringey South East									
Green Lanes	3.31	14.22	4.77	26.82	2.95	14.17	0.81	5.44	72.48
West Green/Seven Sisters	0.41	0.30	4.09	3.10	3.34	0.43	0.81	0.25	12.72
Tottenham Hale Retail Park	15.33	12.15	49.07	39.01	4.71	22.95	9.72	2.72	155.65
Other Zone 4	0.41	0.30	0.23	1.77	0.00	0.00	0.27	0.00	2.98
Sub-total	**19.47**	**26.96**	**58.16**	**70.70**	**11.00**	**37.54**	**11.61**	**8.40**	**243.84**
LB Haringey total	**122.44**	**129.76**	**144.71**	**128.54**	**32.81**	**52.99**	**26.72**	**36.82**	**674.79**
LB Barnet	30.25	67.55	7.27	10.86	32.81	7.08	4.18	78.58	238.58
LB Camden	0.83	8.00	0.45	1.11	21.61	0.43	0.00	0.49	32.92
LB Enfield	18.23	17.18	33.62	29.03	5.70	8.50	71.93	80.81	265.01
LB Hackney	2.07	2.67	2.73	5.32	0.20	36.69	2.43	2.22	54.33
LB Islington	1.24	9.48	1.36	4.21	48.33	5.53	0.81	0.99	71.95
LB Waltham Forest	3.31	2.37	7.27	2.66	0.59	3.83	6.88	3.46	30.37
Central London	16.99	50.36	15.22	26.37	38.11	14.31	6.07	17.79	185.23
Other	11.81	8.89	14.54	13.52	16.31	12.33	15.92	25.95	119.26
TOTAL	**207.17**	**296.26**	**227.17**	**221.63**	**196.45**	**141.67**	**134.95**	**247.12**	**1,672.44**

Source: Tables 3 and 4

Table 9 - Future 2038 comparison goods expendiiture patterns by zone (%)

Location / Zone	1	2	3	4	5	6	7	8	Total
Expenditure 2038	244.08	343.35	265.29	261.60	230.98	170.14	155.20	289.52	**1,960.17**
Zone 1 - Haringey North West									
Wood Green	101.78	32.28	63.67	42.12	11.78	13.44	13.19	17.08	295.34
Other Zone 1	4.64	6.18	1.59	2.62	1.62	0.34	0.31	1.74	19.03
Sub-total	**106.42**	**38.46**	**65.26**	**44.73**	**13.40**	**13.78**	**13.50**	**18.82**	**314.37**
Zone 2 - Haringey South West									
Crouch End	2.44	32.28	1.06	7.59	6.24	0.17	0.78	1.45	51.99
Muswell Hill	6.83	27.47	2.12	1.57	0.69	0.00	0.62	6.37	45.68
Other Zone 2	1.22	20.60	1.86	3.40	5.31	0.68	0.00	0.87	33.94
Sub-total	**10.50**	**80.34**	**5.04**	**12.56**	**12.24**	**0.85**	**1.40**	**8.69**	**131.61**
Zone 3 - Haringey North East									
Bruce Grove/Tottenham High Road	0.24	0.34	6.90	5.23	0.00	2.72	0.31	4.92	20.67
Other Zone 3	4.15	0.00	23.88	5.76	0.00	1.19	2.17	0.87	38.01
Sub-total	**4.39**	**0.34**	**30.77**	**10.99**	**0.00**	**3.91**	**2.48**	**5.79**	**58.68**
Zone 4 - Haringey South East									
Green Lanes	3.91	16.48	5.57	31.65	3.46	17.01	0.93	6.37	85.39
West Green/Seven Sisters	0.49	0.34	4.78	3.66	3.93	0.51	0.93	0.29	14.93
Tottenham Hale Retail Park	18.06	14.08	57.30	46.04	5.54	27.56	11.17	3.18	182.95
Other Zone 4	0.49	0.34	0.27	2.09	0.00	0.00	0.31	0.00	3.50
Sub-total	**22.94**	**31.25**	**67.92**	**83.45**	**12.94**	**45.09**	**13.35**	**9.84**	**286.77**
LB Haringey total	**144.25**	**150.39**	**168.99**	**151.73**	**38.57**	**63.63**	**30.73**	**43.14**	**791.43**
LB Barnet	35.64	78.28	8.49	12.82	38.57	8.51	4.81	92.07	279.19
LB Camden	0.98	9.27	0.53	1.31	25.41	0.51	0.00	0.58	38.58
LB Enfield	21.48	19.91	39.26	34.27	6.70	10.21	82.72	94.67	309.23
LB Hackney	2.44	3.09	3.18	6.28	0.23	44.07	2.79	2.61	64.69
LB Islington	1.46	10.99	1.59	4.97	56.82	6.64	0.93	1.16	84.56
LB Waltham Forest	3.91	2.75	8.49	3.14	0.69	4.59	7.92	4.05	35.54
Central London	20.01	58.37	17.77	31.13	44.81	17.18	6.98	20.85	217.11
Other	13.91	10.30	16.98	15.96	19.17	14.80	18.31	30.40	139.84
TOTAL	**244.08**	**343.35**	**265.29**	**261.60**	**230.98**	**170.14**	**155.20**	**289.52**	**1,960.17**

Source: Tables 3 and 4

Table 10 - Comparison goods floorspace in LB Haringey

Zone / Store	Gross floorspace (sq.m)	Net comparrison sales floorspace (%)	Compariosn goods sales floorspace (sq.m net)
Zone 1 - Haringey North West			
Wood Green Metropolitan Centre	59,000	70%	41,300
Comparison sales in large food stores	n/a	n/a	1,267
Local centres in Zone 1	3,100	70%	2,170
Sub Total	**62,100**		**44,737**
Zone 2 - Haringey South West			
Crouch End District Centre	6,000	70%	4,200
Muswell Hill District Centre	9,000	70%	6,300
Comparison sales in large food stores	n/a	n/a	1,228
Local centres in Zone 2	4,700	70%	3,290
Sub-Total	**19,700**		**15,018**
Zone 3 - Haringey North East			
Bruce Grove/Tottenham High Road	5,000	85%	4,250
Comparison sales in large food stores	n/a	n/a	3,251
Local centres in Zone 3	3,600	70%	2,520
Sub-Total	**8,600**		**10,021**
Zone 4 - Haringey South East			
Green Lanes District Centre	3,900	70%	2,730
Comparison sales in large food stores	n/a	n/a	2,533
Homebase, Arena Park	4,504	90%	4,054
Sport Direct, Arena Park	1,095	85%	930
TK Maxx, Arena Park	1,090	85%	927
Argos, Arena Park	1,571	80%	1,256
Carphone Warehouse, Arena Park	140	85%	119
Dreams, Arena Park	513	90%	461
Poundland, Arena Park	553	85%	470
Superdrug, Arena Park	470	85%	399
Next, Arena Park	930	85%	791
JD Sports, Unit A1 Tottenham Hale Retail Park	580	85%	493
Next, Unit B1 Tottenham Hale Retail Park	502	85%	427
Boots, Unit B2 Tottenham Hale Retail Park	815	85%	693
EE, Unit C2 Tottenham Hale Retail Park	114	85%	97
O2, Unit C4 Tottenham Hale Retail Park	106	85%	90
Cardfactory, Unit F, Tottenham Hale Retail Park	187	85%	159
Currys/PC World, Unit 1 Tottenham Hale RP	1,416	85%	1,204
Argo, Unit 2 Tottenham Hale Retail Park	949	85%	807
Poundland, Unit 3 Tottenham Hale Retail Park	325	85%	276
Asda Living, Unit 4a Tottenham Hale Retail Park	1,951	85%	1,658
TK Maxx, Unit 4a Tottenham Hale Retail Park	2,347	85%	1,995
Lidl, Unit 4b Tottenham Hale Retail Park	1,467	15%	220
Wilko, Unit 7a Tottenham Hale Retail Park	1,744	85%	1,482
Iceland, Unit 76 Tottenham Hale Retail Park	1,113	2%	22
Adidas Outlet, Unit 8 Tottenham Hale Retail Park	696	85%	592
Halfords, Unit 9 Tottenham Hale Retail Park	1,467	85%	1,247
B&Q, Unit 10 Tottenham Hale Retail Park	4,511	90%	4,060
Local centres in Zone 4	2,900	70%	2,030
Sub Total	**37,954**		**32,221**
	128,354		**101,997**

Source: LB Haringey land uses survey 2020 and Lichfields' survey of local centres (June 2021)

Table 11 - Summary of comparison goods expenditure 2021 to 2038 (£M)

Area	2021	2023	2028	2033	2038
Available expenditure					
Zone 1 - North West Haringey	189.45	201.86	231.14	267.96	314.37
Zone 2 - South West Haringey	85.77	89.93	99.26	112.94	131.61
Zone 3 - North East Haringey	34.32	36.83	42.85	50.05	58.68
Zone 4 -South East Haringey	171.87	183.04	210.06	243.84	286.77
Total	**481.41**	**511.67**	**583.31**	**674.79**	**791.43**
Turnover of existing facilities					
Zone 1 - North West Haringey	189.45	203.92	235.48	267.72	304.38
Zone 2 - South West Haringey	85.77	92.32	106.61	121.21	137.81
Zone 3 - North East Haringey	34.32	36.94	42.66	48.50	55.14
Zone 4 -South East Haringey	171.87	184.99	213.62	242.87	276.13
Total	**481.41**	**518.17**	**598.37**	**680.31**	**773.47**
Surplus/deficit expenditure £M					
Zone 1 - North West Haringey	0.00	-2.06	-4.33	0.24	9.98
Zone 2 - South West Haringey	0.00	-2.39	-7.36	-8.27	-6.20
Zone 3 - North East Haringey	0.00	-0.11	0.20	1.55	3.54
Zone 4 -South East Haringey	0.00	-1.95	-3.56	0.97	10.63
Total	**0.00**	**-6.51**	**-15.06**	**-5.52**	**17.97**

Source: Tables 5 to 9

Table 12 - Comparison goods floorspace capacity up to 2038 (cumulative)

	2021	2023	2028	2033	2038
Turnover density new floorspace (£ per sq.m)	£6,000	£6,458	£7,458	£8,479	£9,640
Floorspace projection (sq.m net)					
Zone 1 - North West Haringey	0	-318	-581	28	1,036
Zone 2 - South West Haringey	0	-371	-986	-976	-643
Zone 3 - North East Haringey	0	-17	26	182	368
Zone 4 -South East Haringey	0	-302	-478	114	1,103
Total	**0**	**-1,007**	**-2,019**	**-651**	**1,864**
Floorspace Projection (sq.m gross)					
Zone 1 - North West Haringey	0	-455	-830	41	1,480
Zone 2 - South West Haringey	0	-530	-1,409	-1,394	-918
Zone 3 - North East Haringey	0	-24	37	261	525
Zone 4 -South East Haringey	0	-431	-682	163	1,576
Total	**0**	**-1,439**	**-2,884**	**-930**	**2,662**

Source: Table 10

Appendix 4 Food/beverage assessment

Table 1 - Study area population projections

Zone	2019	2021	2023	2028	2033	2038
1 - Haringey North West	56,704	57,489	58,588	60,221	61,927	63,945
2 - Haringey South West	62,943	62,272	61,962	60,521	60,285	61,237
3 - Haringey North East	77,740	79,995	82,648	87,547	91,054	93,216
4 - Haringey South East	71,274	71,308	71,745	73,391	74,953	77,534
5 - Archway	53,022	52,855	52,043	51,416	52,303	53,905
6 - Stamford Hill	48,386	49,464	50,414	51,798	53,893	56,731
7 - Edmonton	38,398	40,965	43,235	52,031	54,354	54,783
8 - Southgate/Palmers Green	62,438	61,967	61,474	60,949	62,068	63,744
Total	**470,905**	**476,314**	**482,108**	**497,872**	**510,837**	**525,095**

Sources: Experian popluation for zones at 2019 and GLA ward level population projections - housing led 2018-based

Table 2 - Food/beverage expenditure per person per annum (£)

Zone	2021	2023	2028	2033	2038
1 - Haringey North West	1,190	1,406	1,590	1,663	1,739
2 - Haringey South West	1,984	2,343	2,651	2,772	2,899
3 - Haringey North East	915	1,081	1,223	1,279	1,338
4 - Haringey South East	1,187	1,402	1,586	1,659	1,735
5 - Archway	1,626	1,921	2,173	2,273	2,377
6 - Stamford Hill	1,097	1,296	1,466	1,533	1,604
7 - Edmonton	864	1,020	1,154	1,207	1,262
8 - Southgate/Palmers Green	1,256	1,484	1,679	1,756	1,836

Sources:
Experian Local Expenditure 2019 (2019 prices)
Experian growth rates - Retail Planner Briefing Note 18 (October 2020)

Table 3 - Total food/beverage expenditure (£m)

Zone	2021	2023	2028	2033	2038
1 - Haringey North West	68.41	82.37	95.75	102.98	111.20
2 - Haringey South West	123.55	145.18	160.44	167.11	177.52
3 - Haringey North East	73.20	89.34	107.07	116.46	124.72
4 - Haringey South East	84.64	100.59	116.40	124.35	134.52
5 - Archway	85.94	99.97	111.73	118.88	128.13
6 - Stamford Hill	54.26	65.34	75.94	82.62	91.00
7 - Edmonton	35.39	44.10	60.04	65.60	69.14
8 - Southgate/Palmers Green	77.83	91.23	102.33	108.99	117.03
Total	**603.22**	**718.12**	**829.70**	**887.00**	**953.27**

Source: Tables 1 and 2

Table 4 - Base year 2021 food beverage market shares by zone (%)

Location / Zone	1	2	3	4	5	6	7	8
Zone 1 - Haringey North West								
Wood Green	28.2%	0.0%	19.0%	7.0%	1.0%	4.4%	7.1%	3.1%
Other Zone 1	2.6%	0.1%	3.5%	0.9%	3.2%	0.4%	0.0%	2.5%
Sub-total	**30.8%**	**0.1%**	**22.5%**	**7.9%**	**4.2%**	**4.8%**	**7.1%**	**5.6%**
Zone 2 - Haringey South West								
Crouch End	6.4%	26.3%	3.8%	14.9%	0.5%	0.0%	0.0%	2.7%
Muswell Hill	13.0%	22.0%	3.1%	0.6%	2.9%	0.0%	1.7%	6.8%
Other Zone 2	0.3%	12.5%	0.2%	0.6%	7.3%	1.2%	0.0%	0.0%
Sub-total	**19.7%**	**60.8%**	**7.1%**	**16.1%**	**10.7%**	**1.2%**	**1.7%**	**9.5%**
Zone 3 - Haringey North East								
Bruce Grove/Tottenham High Road	0.0%	0.0%	4.2%	0.6%	0.0%	0.0%	0.0%	0.0%
Other Zone 3	0.2%	0.0%	7.2%	1.2%	0.3%	1.2%	1.4%	0.4%
Sub-total	**0.2%**	**0.0%**	**11.4%**	**1.8%**	**0.3%**	**1.2%**	**1.4%**	**0.4%**
Zone 4 - Haringey South East								
Green Lanes	8.0%	1.5%	7.4%	13.2%	2.3%	8.8%	2.0%	3.2%
West Green/Seven Sisters	0.0%	0.0%	0.9%	1.2%	0.0%	1.2%	2.4%	0.0%
Other Zone 4	0.0%	0.0%	0.3%	0.6%	0.0%	0.0%	0.0%	0.0%
Sub-total	**8.0%**	**1.5%**	**8.6%**	**15.0%**	**2.3%**	**10.0%**	**4.4%**	**3.2%**
LB Haringey total	**58.7%**	**62.4%**	**49.6%**	**40.8%**	**17.5%**	**17.2%**	**14.6%**	**18.7%**
LB Barnet	3.6%	3.8%	0.3%	1.7%	0.5%	8.0%	2.4%	15.4%
LB Camden	3.9%	2.5%	2.6%	2.0%	10.4%	0.0%	0.0%	0.0%
LB Enfield	2.6%	1.5%	8.3%	3.7%	2.3%	0.8%	36.1%	40.5%
LB Hackney	0.0%	0.0%	10.2%	4.5%	2.3%	39.6%	4.2%	2.0%
LB Islington	2.3%	7.0%	2.8%	12.1%	40.4%	15.2%	1.4%	1.4%
LB Waltham Forest	1.7%	0.0%	1.2%	1.2%	0.0%	1.6%	7.1%	0.0%
Central London	19.0%	13.6%	13.8%	23.5%	9.2%	8.8%	21.8%	11.1%
Other	8.2%	9.2%	11.2%	10.5%	17.4%	8.8%	12.4%	10.9%
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: NEMS Household Survey July 2021 and Lichfields' analysis.

Table 5 - Base year 2021 food/beverage expendiiture patterns by zone (%)

Location / Zone	1	2	3	4	5	6	7	8	Total
Expenditure 2021	68.41	123.55	73.20	84.64	85.94	54.26	35.39	77.83	**603.22**
Zone 1 - Haringey North West									
Wood Green	19.29	0.00	13.91	5.92	0.86	2.39	2.51	2.41	47.30
Other Zone 1	1.78	0.12	2.56	0.76	2.75	0.22	0.00	1.95	10.14
Sub-total	**21.07**	**0.12**	**16.47**	**6.69**	**3.61**	**2.60**	**2.51**	**4.36**	**57.44**
Zone 2 - Haringey South West									
Crouch End	4.38	32.49	2.78	12.61	0.43	0.00	0.00	2.10	54.80
Muswell Hill	8.89	27.18	2.27	0.51	2.49	0.00	0.60	5.29	47.24
Other Zone 2	0.21	15.44	0.15	0.51	6.27	0.65	0.00	0.00	23.23
Sub-total	**13.48**	**75.12**	**5.20**	**13.63**	**9.20**	**0.65**	**0.60**	**7.39**	**125.26**
Zone 3 - Haringey North East									
Bruce Grove/Tottenham High Road	0.00	0.00	3.07	0.51	0.00	0.00	0.00	0.00	3.58
Other Zone 3	0.14	0.00	5.27	1.02	0.26	0.65	0.50	0.31	8.14
Sub-total	**0.14**	**0.00**	**8.34**	**1.52**	**0.26**	**0.65**	**0.50**	**0.31**	**11.72**
Zone 4 - Haringey South East									
Green Lanes	5.47	1.85	5.42	11.17	1.98	4.78	0.71	2.49	33.87
West Green/Seven Sisters	0.00	0.00	0.66	1.02	0.00	0.65	0.85	0.00	3.18
Other Zone 4	0.00	0.00	0.22	0.51	0.00	0.00	0.00	0.00	0.73
Sub-total	**5.47**	**1.85**	**6.29**	**12.70**	**1.98**	**5.43**	**1.56**	**2.49**	**37.77**
LB Haringey total	**40.16**	**77.09**	**36.30**	**34.53**	**15.04**	**9.33**	**5.17**	**14.55**	**232.18**
LB Barnet	2.46	4.69	0.22	1.44	0.43	4.34	0.85	11.99	26.42
LB Camden	2.67	3.09	1.90	1.69	8.94	0.00	0.00	0.00	18.29
LB Enfield	1.78	1.85	6.08	3.13	1.98	0.43	12.78	31.52	59.55
LB Hackney	0.00	0.00	7.47	3.81	1.98	21.49	1.49	1.56	37.78
LB Islington	1.57	8.65	2.05	10.24	34.72	8.25	0.50	1.09	67.07
LB Waltham Forest	1.16	0.00	0.88	1.02	0.00	0.87	2.51	0.00	6.44
Central London	13.00	16.80	10.10	19.89	7.91	4.78	7.72	8.64	88.83
Other	5.61	11.37	8.20	8.89	14.95	4.78	4.39	8.48	66.66
TOTAL	**68.41**	**123.55**	**73.20**	**84.64**	**85.94**	**54.26**	**35.39**	**77.83**	**603.22**

Source: Tables 3 and 4

Table 6 - Future 2023 food/beverage expendiiture patterns by zone (%)

Location / Zone	1	2	3	4	5	6	7	8	Total
Expenditure 2023	82.37	145.18	89.34	100.59	99.97	65.34	44.10	91.23	**718.12**
Zone 1 - Haringey North West									
Wood Green	23.23	0.00	16.98	7.04	1.00	2.87	3.13	2.83	57.08
Other Zone 1	2.14	0.15	3.13	0.91	3.20	0.26	0.00	2.28	12.06
Sub-total	**25.37**	**0.15**	**20.10**	**7.95**	**4.20**	**3.14**	**3.13**	**5.11**	**69.14**
Zone 2 - Haringey South West									
Crouch End	5.27	38.18	3.40	14.99	0.50	0.00	0.00	2.46	64.80
Muswell Hill	10.71	31.94	2.77	0.60	2.90	0.00	0.75	6.20	55.87
Other Zone 2	0.25	18.15	0.18	0.60	7.30	0.78	0.00	0.00	27.26
Sub-total	**16.23**	**88.27**	**6.34**	**16.19**	**10.70**	**0.78**	**0.75**	**8.67**	**147.93**
Zone 3 - Haringey North East									
Bruce Grove/Tottenham High Road	0.00	0.00	3.75	0.60	0.00	0.00	0.00	0.00	4.36
Other Zone 3	0.16	0.00	6.43	1.21	0.30	0.78	0.62	0.36	9.87
Sub-total	**0.16**	**0.00**	**10.19**	**1.81**	**0.30**	**0.78**	**0.62**	**0.36**	**14.23**
Zone 4 - Haringey South East									
Green Lanes	6.59	2.18	6.61	13.28	2.30	5.75	0.88	2.92	40.51
West Green/Seven Sisters	0.00	0.00	0.80	1.21	0.00	0.78	1.06	0.00	3.85
Other Zone 4	0.00	0.00	0.27	0.60	0.00	0.00	0.00	0.00	0.87
Sub-total	**6.59**	**2.18**	**7.68**	**15.09**	**2.30**	**6.53**	**1.94**	**2.92**	**45.23**
LB Haringey total	**48.35**	**90.59**	**44.31**	**41.04**	**17.50**	**11.24**	**6.44**	**17.06**	**276.53**
LB Barnet	2.97	5.52	0.27	1.71	0.50	5.23	1.06	14.05	31.29
LB Camden	3.21	3.63	2.32	2.01	10.40	0.00	0.00	0.00	21.57
LB Enfield	2.14	2.18	7.42	3.72	2.30	0.52	15.92	36.95	71.15
LB Hackney	0.00	0.00	9.11	4.53	2.30	25.87	1.85	1.82	45.49
LB Islington	1.89	10.16	2.50	12.17	40.39	9.93	0.62	1.28	78.94
LB Waltham Forest	1.40	0.00	1.07	1.21	0.00	1.05	3.13	0.00	7.86
Central London	15.65	19.74	12.33	23.64	9.20	5.75	9.61	10.13	106.05
Other	6.75	13.36	10.01	10.56	17.40	5.75	5.47	9.94	79.24
TOTAL	**82.37**	**145.18**	**89.34**	**100.59**	**99.97**	**65.34**	**44.10**	**91.23**	**718.12**

Source: Tables 3 and 4

Table 7 - Future 2028 food/beverage expendiiture patterns by zone (%)

Location / Zone	1	2	3	4	5	6	7	8	Total
Expenditure 2028	95.75	160.44	107.07	116.40	111.73	75.94	60.04	102.33	**829.70**
Zone 1 - Haringey North West									
Wood Green	27.00	0.00	20.34	8.15	1.12	3.34	4.26	3.17	67.39
Other Zone 1	2.49	0.16	3.75	1.05	3.58	0.30	0.00	2.56	13.88
Sub-total	**29.49**	**0.16**	**24.09**	**9.20**	**4.69**	**3.64**	**4.26**	**5.73**	**81.27**
Zone 2 - Haringey South West									
Crouch End	6.13	42.20	4.07	17.34	0.56	0.00	0.00	2.76	73.06
Muswell Hill	12.45	35.30	3.32	0.70	3.24	0.00	1.02	6.96	62.98
Other Zone 2	0.29	20.06	0.21	0.70	8.16	0.91	0.00	0.00	30.32
Sub-total	**18.86**	**97.55**	**7.60**	**18.74**	**11.95**	**0.91**	**1.02**	**9.72**	**166.36**
Zone 3 - Haringey North East									
Bruce Grove/Tottenham High Road	0.00	0.00	4.50	0.70	0.00	0.00	0.00	0.00	5.20
Other Zone 3	0.19	0.00	7.71	1.40	0.34	0.91	0.84	0.41	11.79
Sub-total	**0.19**	**0.00**	**12.21**	**2.10**	**0.34**	**0.91**	**0.84**	**0.41**	**16.99**
Zone 4 - Haringey South East									
Green Lanes	7.66	2.41	7.92	15.36	2.57	6.68	1.20	3.27	47.08
West Green/Seven Sisters	0.00	0.00	0.96	1.40	0.00	0.91	1.44	0.00	4.71
Other Zone 4	0.00	0.00	0.32	0.70	0.00	0.00	0.00	0.00	1.02
Sub-total	**7.66**	**2.41**	**9.21**	**17.46**	**2.57**	**7.59**	**2.64**	**3.27**	**52.81**
LB Haringey total	**56.21**	**100.11**	**53.11**	**47.49**	**19.55**	**13.06**	**8.77**	**19.14**	**317.43**
LB Barnet	3.45	6.10	0.32	1.98	0.56	6.07	1.44	15.76	35.68
LB Camden	3.73	4.01	2.78	2.33	11.62	0.00	0.00	0.00	24.48
LB Enfield	2.49	2.41	8.89	4.31	2.57	0.61	21.68	41.44	84.39
LB Hackney	0.00	0.00	10.92	5.24	2.57	30.07	2.52	2.05	53.37
LB Islington	2.20	11.23	3.00	14.08	45.14	11.54	0.84	1.43	89.47
LB Waltham Forest	1.63	0.00	1.28	1.40	0.00	1.21	4.26	0.00	9.79
Central London	18.19	21.82	14.78	27.35	10.28	6.68	13.09	11.36	123.55
Other	7.85	14.76	11.99	12.22	19.44	6.68	7.45	11.15	91.55
TOTAL	**95.75**	**160.44**	**107.07**	**116.40**	**111.73**	**75.94**	**60.04**	**102.33**	**829.70**

Source: Tables 3 and 4

Table 8 - Future 2033 food/beverage expendiiture patterns by zone (%)

Location / Zone	1	2	3	4	5	6	7	8	Total
Expenditure 2033	102.98	167.11	116.46	124.35	118.88	82.62	65.60	108.99	**887.00**
Zone 1 - Haringey North West									
Wood Green	29.04	0.00	22.13	8.70	1.19	3.64	4.66	3.38	72.73
Other Zone 1	2.68	0.17	4.08	1.12	3.80	0.33	0.00	2.72	14.90
Sub-total	**31.72**	**0.17**	**26.20**	**9.82**	**4.99**	**3.97**	**4.66**	**6.10**	**87.63**
Zone 2 - Haringey South West									
Crouch End	6.59	43.95	4.43	18.53	0.59	0.00	0.00	2.94	77.03
Muswell Hill	13.39	36.76	3.61	0.75	3.45	0.00	1.12	7.41	66.48
Other Zone 2	0.31	20.89	0.23	0.75	8.68	0.99	0.00	0.00	31.85
Sub-total	**20.29**	**101.60**	**8.27**	**20.02**	**12.72**	**0.99**	**1.12**	**10.35**	**175.36**
Zone 3 - Haringey North East									
Bruce Grove/Tottenham High Road	0.00	0.00	4.89	0.75	0.00	0.00	0.00	0.00	5.64
Other Zone 3	0.21	0.00	8.38	1.49	0.36	0.99	0.92	0.44	12.79
Sub-total	**0.21**	**0.00**	**13.28**	**2.24**	**0.36**	**0.99**	**0.92**	**0.44**	**18.42**
Zone 4 - Haringey South East									
Green Lanes	8.24	2.51	8.62	16.41	2.73	7.27	1.31	3.49	50.58
West Green/Seven Sisters	0.00	0.00	1.05	1.49	0.00	0.99	1.57	0.00	5.11
Other Zone 4	0.00	0.00	0.35	0.75	0.00	0.00	0.00	0.00	1.10
Sub-total	**8.24**	**2.51**	**10.02**	**18.65**	**2.73**	**8.26**	**2.89**	**3.49**	**56.78**
LB Haringey total	**60.45**	**104.28**	**57.76**	**50.73**	**20.80**	**14.21**	**9.58**	**20.38**	**338.20**
LB Barnet	3.71	6.35	0.35	2.11	0.59	6.61	1.57	16.78	38.08
LB Camden	4.02	4.18	3.03	2.49	12.36	0.00	0.00	0.00	26.07
LB Enfield	2.68	2.51	9.67	4.60	2.73	0.66	23.68	44.14	90.67
LB Hackney	0.00	0.00	11.88	5.60	2.73	32.72	2.76	2.18	57.86
LB Islington	2.37	11.70	3.26	15.05	48.03	12.56	0.92	1.53	95.40
LB Waltham Forest	1.75	0.00	1.40	1.49	0.00	1.32	4.66	0.00	10.62
Central London	19.57	22.73	16.07	29.22	10.94	7.27	14.30	12.10	132.19
Other	8.44	15.37	13.04	13.06	20.69	7.27	8.13	11.88	97.89
TOTAL	**102.98**	**167.11**	**116.46**	**124.35**	**118.88**	**82.62**	**65.60**	**108.99**	**887.00**

Source: Tables 3 and 4

Table 9 - Future 2038 food/beverage expendiiture patterns by zone (%)

Location / Zone	1	2	3	4	5	6	7	8	Total
Expenditure 2038	111.20	177.52	124.72	134.52	128.13	91.00	69.14	117.03	**953.27**
Zone 1 - Haringey North West									
Wood Green	31.36	0.00	23.70	9.42	1.28	4.00	4.91	3.63	78.29
Other Zone 1	2.89	0.18	4.37	1.21	4.10	0.36	0.00	2.93	16.03
Sub-total	**34.25**	**0.18**	**28.06**	**10.63**	**5.38**	**4.37**	**4.91**	**6.55**	**94.33**
Zone 2 - Haringey South West									
Crouch End	7.12	46.69	4.74	20.04	0.64	0.00	0.00	3.16	82.39
Muswell Hill	14.46	39.06	3.87	0.81	3.72	0.00	1.18	7.96	71.03
Other Zone 2	0.33	22.19	0.25	0.81	9.35	1.09	0.00	0.00	34.03
Sub-total	**21.91**	**107.94**	**8.86**	**21.66**	**13.71**	**1.09**	**1.18**	**11.12**	**187.45**
Zone 3 - Haringey North East									
Bruce Grove/Tottenham High Road	0.00	0.00	5.24	0.81	0.00	0.00	0.00	0.00	6.05
Other Zone 3	0.22	0.00	8.98	1.61	0.38	1.09	0.97	0.47	13.73
Sub-total	**0.22**	**0.00**	**14.22**	**2.42**	**0.38**	**1.09**	**0.97**	**0.47**	**19.77**
Zone 4 - Haringey South East									
Green Lanes	8.90	2.66	9.23	17.76	2.95	8.01	1.38	3.75	54.63
West Green/Seven Sisters	0.00	0.00	1.12	1.61	0.00	1.09	1.66	0.00	5.49
Other Zone 4	0.00	0.00	0.37	0.81	0.00	0.00	0.00	0.00	1.18
Sub-total	**8.90**	**2.66**	**10.73**	**20.18**	**2.95**	**9.10**	**3.04**	**3.75**	**61.30**
LB Haringey total	**65.27**	**110.78**	**61.86**	**54.88**	**22.42**	**15.65**	**10.09**	**21.89**	**362.85**
LB Barnet	4.00	6.75	0.37	2.29	0.64	7.28	1.66	18.02	41.01
LB Camden	4.34	4.44	3.24	2.69	13.33	0.00	0.00	0.00	28.03
LB Enfield	2.89	2.66	10.35	4.98	2.95	0.73	24.96	47.40	96.92
LB Hackney	0.00	0.00	12.72	6.05	2.95	36.03	2.90	2.34	63.00
LB Islington	2.56	12.43	3.49	16.28	51.77	13.83	0.97	1.64	102.96
LB Waltham Forest	1.89	0.00	1.50	1.61	0.00	1.46	4.91	0.00	11.37
Central London	21.13	24.14	17.21	31.61	11.79	8.01	15.07	12.99	141.95
Other	9.12	16.33	13.97	14.12	22.29	8.01	8.57	12.76	105.18
TOTAL	**111.20**	**177.52**	**124.72**	**134.52**	**128.13**	**91.00**	**69.14**	**117.03**	**953.27**

Source: Tables 3 and 4

Table 10 - Food and beverage outlets in LB Haringey

Zone / Store	Restaurants/cafés	Hot food takeways	Pubs/bars	Total
Zone 1 - Haringey North West				
Wood Green	32	29	3	64
Other Zone 1	46	39	6	91
Sub Total	**78**	**68**	**9**	**155**
Zone 2 - Haringey South West				
Crouch End	39	4	7	50
Muswell Hill	29	3	4	36
Other Zone 2	60	20	4	84
Sub-Total	**128**	**27**	**15**	**170**
Zone 3 - Haringey North East				
Bruce Grove	13	10	5	28
Other Zone 3	17	30	4	51
Sub-Total	**30**	**40**	**9**	**79**
Zone 4 - Haringey South East				
Green Lanes	21	11	3	35
West Green Seven Sisters	32	24	5	61
Other Zone 4	31	14	3	48
Sub Total	**84**	**49**	**11**	**144**
	320	**184**	**44**	**548**

Source: LB Haringey land uses survey 2020 and Lichfields' survey of local centres (June 2021)

Table 11 - Summary of food/beverage expenditure 2021 to 2038 (£M)

Area	2021	2023	2028	2033	2038
Available expenditure					
Zone 1 - North West Haringey	57.44	69.14	81.27	87.63	94.33
Zone 2 - South West Haringey	125.26	147.93	166.36	175.36	187.45
Zone 3 - North East Haringey	11.72	14.23	16.99	18.42	19.77
Zone 4 -South East Haringey	37.77	45.23	52.81	56.78	61.30
Total	**232.18**	**276.53**	**317.43**	**338.20**	**362.85**
Turnover of existing facilities					
Zone 1 - North West Haringey	57.44	75.47	77.38	79.33	81.33
Zone 2 - South West Haringey	125.26	164.59	168.75	173.01	177.38
Zone 3 - North East Haringey	11.72	15.40	15.79	16.19	16.60
Zone 4 -South East Haringey	37.77	49.63	50.88	52.17	53.48
Total	**232.18**	**305.09**	**312.79**	**320.69**	**328.79**
Surplus/deficit expenditure £M					
Zone 1 - North West Haringey	0.00	-6.33	3.89	8.30	13.00
Zone 2 - South West Haringey	0.00	-16.66	-2.39	2.35	10.07
Zone 3 - North East Haringey	0.00	-1.17	1.20	2.23	3.18
Zone 4 -South East Haringey	0.00	-4.40	1.93	4.62	7.81
Total	**0.00**	**-28.56**	**4.64**	**17.51**	**34.06**

Source: Tables 5 to 9

Table 12 - Food and beverage floorspace capacity up to 2038 (cumulatiive)

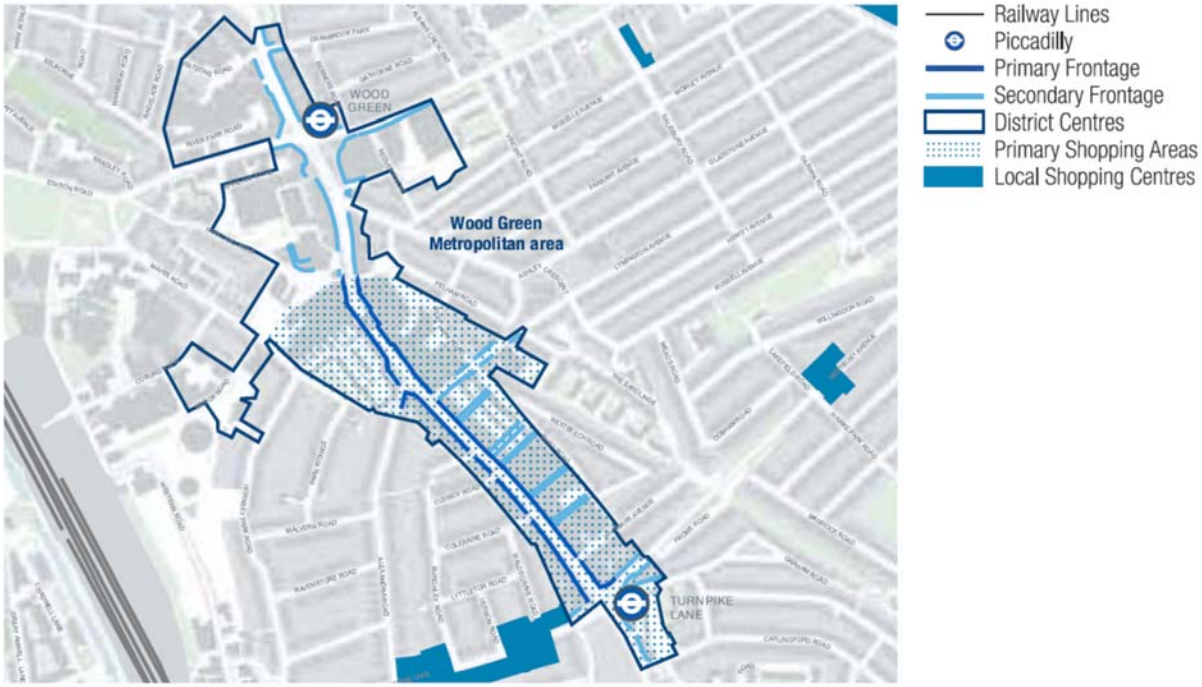
	2021	2023	2028	2033	2038
Turnover density new floorspace (£ per sq.m)	£5,000	£5,050	£5,178	£5,308	£5,442
Floorspace projection (sq.m gross)					
Zone 1 - North West Haringey	0	-1,254	752	1,564	2,388
Zone 2 - South West Haringey	0	-3,299	-461	443	1,851
Zone 3 - North East Haringey	0	-232	232	421	584
Zone 4 -South East Haringey	0	-870	373	870	1,436
Total	**0**	**-5,656**	**896**	**3,298**	**6,258**

Source: Table 11

Appendix 5 Main centres analysis

Wood Green Metropolitan Centre

Wood Green is the largest centre in the Borough and is identified as a 'Metropolitan Centre' in The London Plan and has a strategic shopping role providing both convenience and high and low order comparison retailers. The centre is linear, stretching along the High Road from the junction with Turnpike Lane in the south to the junction with Bounds Green Road in the north. The centre is connected to Turnpike Lane Local Centre to the south. The centre is situated on the main A105 north-south thoroughfare of the A105. The centre also has a relatively significant leisure/entertainment offer. Wood Green serves customers both from the Borough and across north London, assisted by good public transport links.



The centre includes The Mall Wood Green (formally known as a Shopping City). The Mall is dissected into two sections by the A105 High Road. These two sections are linked by bridges at first and second floor level. The Mall opened in 1981 and is six storeys high, with the lower two floors are occupied by shops. The upper floors are occupied by a housing complex known as 'sky city'. The Mall provides a focus for major multiple retailers located in the centre.

The main primary shopping area is located along High Road. This includes the Mall Wood Green shopping centre which provides a covered, pedestrian friendly shopping environment. The primary area has a mix of national and independent retailers. The secondary shopping areas are located primarily at the northern and southern ends of the centre. At the north, the secondary frontage begins opposite the bus depot and runs along High Road to just past the junction with Gladstone Avenue. At the south the secondary frontage is located around the tube and bus stations, moving slightly down Westbury Avenue. There is also a small section of secondary frontage in the middle of the centre along Lymington Avenue. These areas are made up predominantly of smaller, independent outlets. There is small collection of independent cafés and specialist shops located along Station Road, called 'Blue House Yard'. There is also a Fruit Street Market located centrally on the corner of Brampton Park Road.

Wood Green centre is bounded predominantly by residential areas. There are also community uses, including a church, school and civic centre, just north of the centre. King George VI Memorial Gardens are just north of the centre and Duckett's Common is to the south. Wood Green centre is directly adjacent to two conservation areas; Trinity Gardens is to the north and Noel Park is to the east. Additionally, Wood Green Common conservation area is to the west of the centre. Slightly further north is Bowes Park conservation area. There are also some small areas of green space adjacent to the south (Duckett's Common). The northern boundary of the centre has a limited range of retail uses with Council offices, residential areas and employment land (offices/light industrial).

The key roles of Wood Green include:

- convenience shopping: including grocers (x6), off licences (x1), butchers (x1), bakers (x8), health food shops (x2), newsagents (x4), ice cream parlours (x4), delicatessens (x3) and a fish mongers (x1). There are several convenience stores including a Tesco Express, Sainsbury's Local and independent stores. Larger supermarkets including Lidl, Iceland, Morrisons, Sainsbury's;
- comparison shopping: a good proportion of multiple retailers selling a range of higher and lower order comparison goods;
- services: provides a good range of high street national banks/building societies, cafés and restaurants, takeaways. Limited proportion of pubs/bars and estate agents;
- entertainment and evening economy: limited range of pubs, however, a good range of restaurants and takeaways. There are also two cinemas, a bingo hall, betting shops, 3 amusement arcades and a casino; and
- community facilities: a library, Council Offices, five dentists, three gyms.

Mix of uses and occupier representation

Wood Green has 367 retail and service units (source: Wood Green land use survey 2020). The diversity of uses within Wood Green is set out in Table WG1, compared with the Goad Plan national average and the GLA Town Centre Data 2017 average for London.

Table WG1 - Mix of shop and service uses – Wood Green

Type	Number units	% units	GLA London average	UK average
Comparison goods retail	152	41.4	37.7	29.7
Convenience goods retail	49	13.4	12.8	9.1
Financial/professional services	21	5.7	14.7	9.3
Other non-retail services	57	15.5		16.5
Restaurants/cafés	32	8.7	14.9	9.9
Pubs/bars	3	0.8	3.8	4.8
Hot food takeaways	29	7.9	7.4	6.1
Vacant	24	6.5	8.6	14.6
Total	**367**	**100.0**	**100.0**	**100.0**

Source: LDC Wood Green land use survey 2020 (former Class A uses only), GLA 2017 London Town Centre Data and Experian Goad Plan national averages.

The mix of uses in Wood Green centre broadly reflects the GLA average in 2017, but there are several differences. The centre has a higher proportion of comparison retailers compared with both the national and London averages and a slightly higher proportion of convenience retailers. Conversely, the centre has lower proportions of financial/professional services, restaurants/cafés and pubs/bars. There were 24 vacant units within Wood Green at the time of the LDC's 2020 survey, equating to a vacancy rate of 6.5% (ground floor

former Class A uses only), which is much lower than the national average. The Council's more recent survey in September 2021 suggests only 9 vacant units in the centre.

Table WG2 provides a breakdown of comparison shop units by category. Wood Green has many comparison shops (152), the highest of all the centres in Haringey and most Goad comparison goods categories are represented with only two categories not represented, as shown in Table WG2 i.e. cars/motorcycles accessories and florists/nurserymen and seedsmen. There are also only two units selling china, glass and gifts. The choice of shops in many categories in strong.

Table WG2 - Mix of comparison goods uses – Wood Green

Type	Number Units	% units	UK Average
Clothing and footwear	48	31.6	21.5
Furniture, carpets and textiles	9	5.9	7.6
Books, arts, cards and stationers	7	4.6	7.7
Electrical, music and photography	19	12.5	9.1
DIY, hardware and homeware	4	2.6	6.6
China, glass and gifts	2	1.3	5.3
Cars, motorcycles and accessories	0	0.0	1.3
Chemists, drug stores and opticians	13	8.6	11.7
Variety, department and catalogue	5	3.3	1.8
Florists, nurserymen and seedsmen	0	0.0	2.2
Toys, hobby, cycle and sports	6	3.9	5.3
Jewellers	9	5.9	5.0
Charity and second-hand shops	7	4.6	9.9
Other comparison good retailers	23	15.1	5.0
Total	**152**	**100.0**	**100.0**

Source: LDC's Wood Green land use survey 2020 and Experian Goad Plan national averages.

There is a higher proportion of clothing and footwear; electrical, music and photography; variety, department and catalogue and other comparison good retailers compared with the national average but there is a lower than average proportion of furniture/carpets and textiles; books/arts/cards and stationers; DIY/ hardware and homeware; china/glass and gifts; chemists/drug stores and opticians; toys/ hobby, cycle and sports and charity and second-hand shops. Overall, Wood Green has a relatively good range and choice of comparison goods outlets, which reflects the centre's size and role within Haringey. The national multiple comparison retailers include:

Table WG3 – Wood Green's comparison multiples

Argos	Boots Opticians	Boots the Chemist	BT
Card Factory	Cineworld	Claire's	Clarks
Deichmann	EE	Foot Locker	Flying Tiger Copenhagen
Game Zone	H&M	Holland and Barrett	Home Store
House of Leather	H. Samuel	J D Sports	Matalan Clearance Store
New Look	O2	Poundland	Primark
River Island	Savers	Schuh	Sky
Shoezone	Specsavers	Sports Direct	Superdrug
The Fragrance Shop	The Perfume Shop	The Works	TK Maxx
WHSmith	Wilko	Vodaphone	3 Store

Source: LDC's Wood Green land use survey 2020

Wood Green centre has an excellent range of service uses (142 units), as shown in Table WG4, the highest number out of all six main centres in the Borough.

The centre has significantly higher proportion of fast food/takeaways compared with the national average. The centre also has a good choice of restaurants/cafés in line with the national average. However, there is a significantly lower proportion of hairdressers/beauty parlours and pubs/bars when compared with the national average. There is also lower proportions of estate agents/valuers and travel agents. Multiple food/beverage outlets include McDonalds, KFC, Five Guys, Subway, Pret a Manger and Costa.

Table WG4 - Mix of service uses – Wood Green

Type	Number Units	% units	UK Average
Restaurants/cafés	32	25.2	23.8
Fast food/takeaways	29	22.8	14.7
Pubs/bars	3	2.4	11.7
Banks/other financial services	15	11.8	8.6
Betting shops/casinos/amusement	12	9.4	3.8
Estate agents/valuers	4	3.1	7.9
Travel agents	4	3.1	1.7
Hairdressers/beauty parlours	25	19.7	26.1
Launderettes/dry cleaners	3	2.4	1.7
Sub-total	**127**	**100.0**	**100.0**
Other	15		
Total	**142**		

Source: LDC's Wood Green land use survey 2020 and Experian Goad Plan national averages.

Commercial rents

According to the VOA, Zone A retail rents vary throughout the centre. Wood Green has the highest prime pitch rental levels of the six main centres. Just south of the Mall Zone A rents predominantly range from £785 - £1,390 per sq.m and this represents the prime pitch. Rents within the Mall are lower at around £600. On the periphery of the centre, Zone A retail rents are lower. In the southern part fringe Zone A rents are around £475 per sq.m and in the northern fringe they are between £505 and £650 per sq.m. A small cluster of units on the west side of West Green Road just before the junction with Alexandra Road have low Zone A retail rents of £365 per sq.m. Overall, the centre provides a good mix of affordable to more expensive prime pitch shop premises, although rents are relatively high in the prime pitch, which may be unaffordable for many potential new occupiers.

Catchment area

Wood Green's local catchment area (the Wood Green Neighbourhood) includes the wards of Bounds Green, Woodside and Noel Park. Approximately 26% of the residents live in areas which fall within the 10% most deprived areas in the country, as indicated in the Local Plan Strategic Policies (2013).

The household survey results indicate that 60% of respondents across the study area had used shops and services in Wood Green in the last year, which is the highest for the six main centres in the Borough. In the local area (Zone 1), 85% had visited the centre. In the study area 14% of household suggested they do most of their non-food shopping in Wood Green, the highest proportion for all shopping destinations apart from internet shopping (33%).

The retail capacity analysis suggests Wood Green attracts about 40% of its trade from the local Zone 1, but the centre attracts reasonably high levels of trade from the three other zones in the Borough. The centre has a relatively wide catchment area when compared with other town centres in the Borough.

London Plan indicators

The London Plan (Policy SD8) sets out the network of centres and provides indicators for individual centres within the network. Wood Green's designations are:

- Network classification: Metropolitan centre
- Night-time classification: NT2 (regional/sub-regional significance)
- Commercial growth potential: Medium (moderate levels of retail, leisure or office demand)
- Residential growth potential: High
- Office guidelines: None
- Strategic area for regeneration: Yes

Customer views

As part of the household survey, respondents were asked if they had used shops and services in Wood Green in the last year. Of those who had used shops/services in Wood Green, respondents were asked what they like and dislike about the town centre. The main factor liked in Wood Green was 34% mentioning the good range of shops. The other main factors mentioned (5% of respondents or more) were:

- *factors liked*: good choice of shops in general (29%); good choice of clothing shops (18%); nothing/none mentioned (16%); close to home (16%); shopping environment (11%); bus services (10%); supermarkets (8%); good quality shops (8%) and car parking (6%).
- *factors disliked*: nothing/none mentioned (32%); traffic/congestion (17%); maintenance/cleanliness (14%); poor quality shops (11%), shopping environment (10%); unsafe/crime rate (10%); poor range of shops (9%); car parking (8%); poor choice of shops in general (8%) and too busy (6%).

Wood Green town centre rates most favourably in terms of its range of shops, particularly its range of clothing shops when compared with the other centres. The centre rates least favourably in terms of traffic and congestion when compared with the other town centres apart from Green Lanes.

Stakeholder feedback

A selection of stakeholders were asked about their views on town centres in the Borough. Comments were received regarding Wood Green and the connected Turnpike Lane Local Centre. Stakeholders described Wood Green and Turnpike Lanes' current trading performance as "satisfactory" but performance was considered to be "declining". The key strengths and weakness suggested were:

Strengths: transport links; the indoor shopping mall, the choice of local shops; ethnic shops/services; proximity to Alexandra Palace (but links should be improved);

Weaknesses: unclean pavements; high crime levels; poor variety of shops; lack of big name retailers; too many betting shops; too many charity shops; poor night-time economy (e.g. al-fresco dining); lack of family leisure activities e.g. trampolining/tenpin bowling; lack and high cost of car parking and poor enforcement; lack of funding to implement improvements.

Accessibility

The household survey results suggest Wood Green attracts customers by a variety of means of transport. Mode of travel for food shopping within the local area (Zone 1) is relatively similar to the study area average

with the highest proportion of respondents doing their main food shopping by car or walking. However, a higher proportion of respondents walk (44%) closely followed by car travel (38%). The study area average has a higher proportion of car travel, closely followed by walking. For non-food shopping, Wood Green attracts a good mix of car, bus, train/underground and walking customers, which suggests significantly high levels of accessibility. The survey results also indicated slightly higher levels of dissatisfaction with car parking provision than satisfaction (i.e. 8% compared with 6%). However, more respondents mentioned bus services as a positive rather than a negative factor (9% compared with less than 1%).

Wood Green town centre has excellent public transport accessibility. Public Transport Accessibility Levels (PTAL) are the highest Level 6 across the centre (Source: Haringey Strategic Policies Local Plan). The centre has two underground stations; Turnpike Lane is located at the southern end and Wood Green is at the northern end of the centre. Both stations are served by the Piccadilly Line which provides services between both ends of the centre and towards Cockfosters, Heathrow and Uxbridge. Hornsey railway station is also approximately a nine-minute walk from Wood Green underground station and is situated by the New River Canal. The station has good links into the City, with trains reaching London's King's Cross and Moorgate in less than 15 minutes.

The centre is also served by many bus routes, with frequent bus stops throughout. Wood Green Bus Garage is located at the northern end of the centre at the crossroads with Lordship Lane and Station Road. Bus routes serving the north of the centre include numbers W3, 144 and N91. Turnpike Lane bus station is located at the southern end of the centre. Bus routes serving the south end of the centre include numbers 41, 123, 217, 230, 231, 444, N41. There are numerous bus stops located throughout the centre on High Road; key bus routes include numbers W4, 29, 141, 144, N29, 67, 121, 184, 221, 231, 329 and 230.

The town centre also has several accessible car parks (8 in total). There are two car parks located at the Mall. Bury Road multi-storey car park, situated in the middle of the centre, provides 500 spaces and is open Monday to Saturday: 8am to 8.15pm Sunday: 11am to 5.15pm. There are on-street parking spaces available which are within controlled zones where pay and display is required, and various restrictions apply. The CPZ is split into inner and outer zones with varying operating hours but the cost is £3.30 per hour (free on bank holidays) throughout.

Environment quality

The quality of buildings within Wood Green town centre is predominantly good. There is good architectural continuity between the older and more modern buildings. The southern end of High Road is dominated by older buildings with the ground floor level converted into retail shopfronts. The buildings are more modern in the central area where the Mall is located. Wood Green underground station (Grade II Listed) and Turnpike Lane underground station are key features at either end of the centre. Some of the buildings on the periphery of the centre are looking tired and dated and would benefit from refurbishment.

Wood Green is dominated by traffic with vehicles are most heavily concentrated on the outer edges of the centre due to the junctions with roads leading into the High Street and traffic running through the centre's single laned highway. However, there are frequent pedestrian crossings and wide pavements throughout the centre and the pedestrianised Mall is centrally located. Pedestrian flows are highest in the primary shopping areas, especially around the entrances to the shopping mall. Several cafés/restaurants provide outside seating for customers in the central to northern part of the centre.

Overall, during the daytime the centre felt relatively safe and there was no evidence of anti-social behaviour or begging. There was limited evidence of graffiti or vandalism. Although there are limited areas of green open space within the centre boundary, but King George VI Memorial Gardens and Duckett's Common are just to the north and south of the centre and easily accessible from the centre. Some street furniture is provided at side roads including Lymington Road and outside of the library, but this is dated. There was limited evidence of litter at the time of visit to the centre. The primary shopping area is generally cleaner than

the periphery of the centre. There are no obvious clusters of vacant units but are predominantly in peripheral parts of the centre. A few vacant units within the centre were being renovated and should soon reopen.

Reported crime

Wood Green centre falls within both Noel Park and Woodside Metropolitan Police neighbourhoods. Most of the centre falls within Noel Park Police neighbourhood and its statistics are included to allow comparison with other centres within Haringey. Recorded crime within the Noel Park Metropolitan Police neighbourhood was 3,854 from July 2020 – June 2021, the second highest of six main centres in the Borough. Anti-social behaviour represented 26% of total crimes, followed by violent and sexual offences (17%) and other theft (11%).

Summary of Wood Green Strengths and Weaknesses

Strengths

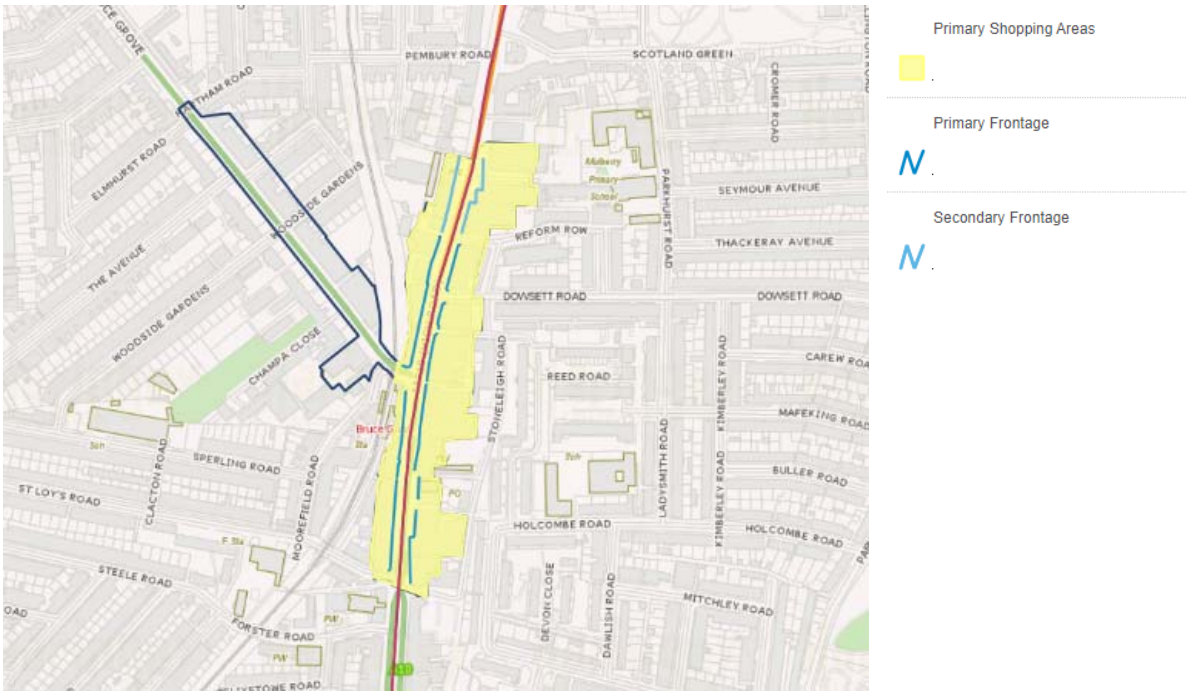
- Wood Green's catchment area extends across the Borough and beyond.
- Four large food supermarkets suitable for main and bulk food shopping.
- Highest number of comparison shops of all centres in the Borough, with a good range of multiple retailers.
- Ethnic shops and services.
- Excellent range of non-retail services and entertainment facilities.
- The London Plan suggests high potential for residential growth.
- A reasonable night-time economy, which is classified as NT2 in the London Plan (regional/sub-regional significance), although there still appears to be potential to improve the number of restaurants and bars.
- The Mall Wood Green shopping centre provides a covered pedestrian friendly shopping environment.
- The shop vacancy rate is lower than both London and national averages.
- Excellent public transport links i.e. underground, bus and over-ground rail nearby and relatively good car parking provision when compared with other centres.
- Multiple food and beverage outlets include Five Guys, Subway, Pret a Manger and Costa.

Weaknesses

- Limited proportion of pubs/bars and estate agents/valuers.
- Traffic congestion appears to be an issue throughout the centre and this issue was mentioned by high proportion of the household survey respondents.
- The selection of comparison retail shops in some categories is limited.
- Second highest crime rate of the six town centres.
- The shopping environment could be improved in terms of green open spaces, landscaping street furniture and street cleaning in peripheral areas.
- The local neighbourhood has relatively high levels of deprivation.

Bruce Grove/Tottenham High Road District Centre

Bruce Grove/Tottenham High Road is in the east of the Borough and is identified as a 'District Centre' in the London Plan. The centre is focused along two main roads, Bruce Grove and High Road (A10). The centre begins on High Road at the junction with Stoneleigh Road and St Loys Road and continues north to the junction with Bruce Grove where the centre then forks. There are additional shops and services north and south of the boundary on High Road, but these are not included in the designated centre boundary. Bruce Grove railway runs north-south through the middle of the centre, where the two roads meet, to the east of Bruce Grove and west of High Road.



The centre is located to the north of West Green Road/Seven Sisters District Centre and Tottenham Hale Retail Park. Bruce Grove/Tottenham High Road District Centre is bound by residential areas and community uses. The centre is located within Bruce Grove conservation area, one of five conservation areas within Tottenham High Road Historic Corridor. The main primary shopping is located along the majority of High Road. There is a small section of secondary frontage at the north of High Road from the junction with Albion Road to the Aldi store at the end of the centre. Bruce Grove road is not designated as either primary or secondary frontage. There are also additional shops and services located out of the designated town centre.

Bruce Grove/Tottenham High Road's key roles include:

- convenience shopping – large Aldi, Asda and Iceland stores suitable for main and bulk food shopping. These stores are supported by bakers (x2), halal butchers (x3), health food stores (x2), newsagents (x3), independent convenience stores (x15), fishmongers (x2), an off licence and a greengrocer.
- comparison shopping – limited range of comparison retailers and the majority are small independent retailers, with a small number of multiple retailing shops;
- services – a good range of takeaways, cafes and hairdressers/beauty parlours. Also, a relatively good range of estate agents, high street national banks/building societies;

- entertainment and evening economy – a good choice of restaurants and takeaways but a limited choice of pubs/bars; and
- community facilities – including two dentists, two doctors' surgeries, 2 gyms, 3 social/night clubs.

Mix of use and occupier representation

Bruce Grove/Tottenham High Road has 174 retail and service units (source: land use survey 2020). The diversity of uses within Bruce Grove/Tottenham High Road is set out in Table BT1, compared with the Goad Plan national average and the GLA Town Centre Data 2017 average for London.

Table BT1 - Mix of shops/service uses in Bruce Grove/Tottenham High Road

Type	Number units	% Units	GLA London average	UK average
Comparison goods retail	44	25.3	37.7	29.7
Convenience goods retail	33	19.0	12.8	9.1
Financial/professional services	18	10.3	14.7	9.3
Other non-retail services	30	17.2		16.5
Restaurants/cafés	13	7.5	14.9	9.9
Pubs/bars	5	2.9	3.8	4.8
Hot food takeaways	10	5.7	7.4	6.1
Vacant	21	12.1	8.6	14.6
Total	**174**	**100.0**	**100.0**	**100.0**

Source: LDC's land use survey 2020 (former Class A uses only), GLA 2017 London Town Centre Data and Experian Goad Plan national averages.

Bruce Grove/Tottenham High Road has a higher proportion of convenience retail units compared with the London and national averages, but the proportions of restaurants/cafés and pubs/bars are lower than both averages. There were 21 vacant retail units within Bruce Grove/Tottenham High Road at the time of the LDC's 2020 survey, a vacancy rate (11.3%), which is slightly lower than the current national average. The Council's more recent survey in September 2021 suggests only 13 vacant units in the centre.

Bruce Grove/Tottenham High Road has a limited selection of comparison shops (44) when compared with Wood Green, Muswell Hill and Crouch End. Table BT3 provides a breakdown of comparison units by category.

There are four Goad categories which are not represented in the centre, i.e. books/arts/ cards and stationers; cars/ motorcycles and accessories; variety/department and catalogue; and toys/hobby/ cycle and sports. A further five categories only have two units represented in the centre and there is limited choice, i.e. DIY/hardware and homeware; china/glass and gifts; florists/nurserymen and seedsmen; jewellers and charity and second-hand shops. Bruce Grove/Tottenham High Road has a high proportion of electrical, music and photography units and chemists, drug stores and opticians compared with the national average for a centre of its size.

The number of multiple comparison retailers (excluding charity shops) is relatively limited and tend to be lower order comparison goods. Most comparison shops are small independent traders. The multiple comparison retailers include:

Table BT2 – Bruce Grove/Tottenham High Road's comparison multiples

George (Asda)	Lloyds pharmacy	M & G	Shoezone
Specsavers Opticians	Specsavers Hear care	Superdrug	

Source: LDC's Bruce Grove/Tottenham High Road land use survey 2020

Table BT3 - Mix of comparison goods shops – Bruce Grove/Tottenham High Road

Type	Number Units	% units	UK Average
Clothing and footwear	6	13.6	21.5
Furniture, carpets and textiles	5	11.4	7.6
Books, arts, cards and stationers	0	0.0	7.7
Electrical, music and photography	9	20.5	9.1
DIY, hardware and homeware	2	4.5	6.6
China, glass and gifts	2	4.5	5.3
Cars, motorcycles and accessories	0	0.0	1.3
Chemists, drug stores and opticians	8	18.2	11.7
Variety, department and catalogue	0	0.0	1.8
Florists, nurserymen and seedsmen	2	4.5	2.2
Toys, hobby, cycle and sports	0	0.0	5.3
Jewellers	2	4.5	5.0
Charity and second-hand shops	2	4.5	9.9
Other comparison goods retailers	6	13.6	5.0
Total	**44**	**100.0**	**100.0**

Source: LDC's Bruce Grove/Tottenham High Road land use survey 2020 and Experian Goad Plan national averages.

Bruce Grove/Tottenham High Road has a reasonable selection of service uses (76 in total), as shown in Table BT4, but this is the lowest within the six main centres, but the range of services is still reasonable with all categories represented. The mix of service uses is broadly similar to the national average but there is a lower proportion of hairdressers/beauty parlours.

With regards to food/beverage uses, there is a low proportion of pubs/bars and a reasonably high representation of fast food/takeaways. The other food/beverage uses include 8 restaurants, 4 cafés, and 1 coffee shop. There appears to be potential to improve facilities serving the night-time economy.

Table BT4 - Mix of service uses – Bruce Grove/Tottenham High Road

Type	Number units	% units	UK Average
Restaurants/cafés	13	20.6	23.8
Fast food/takeaways	10	15.9	14.7
Pubs/bars	5	7.9	11.7
Banks/other financial services	7	11.1	8.6
Betting shops/casinos/amusement	5	7.9	3.8
Estate agents/valuers	8	12.7	7.9
Travel agents	2	3.2	1.7
Hairdressers/beauty parlours	12	19.0	26.1
Launderettes/dry cleaners	1	1.6	1.7
Sub-total	**63**	**100.0**	**100.0**
Other	13		
Total	**76**		

Source: LDC Bruce Grove/Tottenham High Road land use survey 2020 and Experian Goad Plan national averages.

Commercial rents

According to the VOA, Zone A retail rents vary throughout the centre. In the middle section of the centre on High Road, primary frontage Zone A rents of around £550 per sq.m are achieved. The Zone A retail rents remain relatively high towards the southern end of the centre, ranging from £341 to £500 per sq.m. At the northern end of High Road, rents are lower ranging from £275 to £420 per sq.m near the centre boundary. In the peripheral parts of Bruce Grove Road, Zone A rents are around £410 per sq.m. Overall, the centre provides a good mix of affordable to medium cost premises.

Catchment area

Bruce Grove's local catchment area (the West Green and Bruce Grove Neighbourhood) includes the wards of West Green, Bruce Grove and Tottenham Hale. The household survey results indicate 25% of respondents across the study area had used shops and services in Bruce Grove in the last year, which is the second lowest percentage for the six main centres in the Borough. However, a high proportion (65%) living in the local area (Zone 3) had visited the centre. Only 1.4% of respondents indicated that they do most of their non-food shopping in Bruce Grove/Tottenham High Road, significantly below Wood Green (14%) and Tottenham Hale Retail Park (5%). The retail capacity analysis suggests Bruce Grove/Tottenham High Road attracts most trade (60%) from Zone 3. The centre has a relatively localised catchment area when compared with Wood Green and Tottenham Hale Retail Park.

London Plan indicators

The London Plan (Policy SD8) sets out the network of centres and provides indicators for individual centres within the network. Bruce Grove / Tottenham High Road's designations are:

- Network classification: District centre
- Night-time classification: None
- Commercial growth potential: Low (low levels of retail, leisure or office demand)
- Residential growth potential: Incremental
- Office guidelines: None
- Strategic area for regeneration: Yes

Customer views

As part of the household survey, respondents were asked if they had used shops and services in Bruce Grove/Tottenham High Road in the last year. Of those who had used shops/services in the centre, respondents were asked what they like and dislike about Bruce Grove/Tottenham High Road Town centre. About 20% of respondents liked the centre because they consider it to have a good range of shops. The other main factors mentioned (5% of respondents or more) were:

- *factors liked*: nothing/none mentioned (19%); close to home (17%); good choice of shops in general (16%); supermarkets (14%); shopping environment (11%); bus services (10%); good choice of clothing shops (6%) and good quality shops (6%).
- *factors disliked*: nothing/none mentioned (35%); traffic/congestion (14%); maintenance/cleanliness (13%); shopping environment (11%); poor range of shops (10%); unsafe/crime rate (10%); poor quality shops (8%); car parking (8%); poor choice of clothing shops (7%) and poor choice of shops in general (7%).

The results suggest there are mixed views regarding the choice and quality of shops and the shopping environment. Bruce Grove/Tottenham High Road rates least favourably in terms of traffic congestion.

Accessibility

Public Transport Accessibility Levels (PTAL) are between Level 5 and Level 6 across the centre (Source: Haringey Strategic Policies Local Plan), the highest levels of accessibility behind Wood Green and West Green Road/Seven Sisters.

The household survey results suggest Bruce Grove/Tottenham High Road attracts customers by a variety of means of transport. Mode of travel for food shopping within the local area (Zone 3) is similar to the study area average with the highest proportions doing their main food shopping by car (49%) or walking (23%). For non-food shopping, Bruce Grove/Tottenham High Road attracts a good mix of car, bus and walking customers, which suggests high levels of accessibility. However, the centre has the lowest proportion of visitors travelling by train (2%) and underground (3%). The survey results also indicated higher levels of dissatisfaction with car parking provision than satisfaction i.e. 8% compared with 3%. However, more respondents mentioned bus services as a positive rather than a negative factor (10% compared with 1%).

Bruce Grove/Tottenham High Road centre has reasonable public transport accessibility. Bruce Grove over ground railway station is nearby, although just outside of the centre boundary designation. The trainline provides good access into central London and north to Cheshunt (Hertfordshire) and Enfield. The centre does not have an underground line but is well served by bus routes, providing good access to other centres within the Borough and other parts of London. Bus routes which serve the centre include numbers 123, 149, 243, 259, 279, 318, 341, 349, 476, L1, L2, W4 and N279.

The centre has three main car parks, Stoneleigh Road car park A (50 spaces), B (33 spaces) and C (28 spaces), all of which are open Monday to Saturday 8am to 6.30pm. Regency Car Park, situated on Bruce Grove Road, provides parking for Regency Banqueting Suite customers. The Aldi supermarket also provides car parking for its customers. There is on-street parking available within controlled zones where pay and display is required (£1.30 per hour), and various restrictions apply. Operating hours are extended on Tottenham Hotspur match days.

Environment quality

The quality of buildings in Bruce Grove/Tottenham High Road is predominantly good with a mix of historic and more modern buildings. The buildings are of a better visual quality on High Road as several shopfronts on Bruce Grove have temporary structures attached to the shopfront which detracts from the visual appearance of the units. Units located on the peripheral areas of the centre appear out-dated and tired. The station and railway bridge are central features in the centre. There are a few vacant buildings in the primary shopping area but there were more along Bruce Grove, which detract from the overall appearance and ambience of the centre.

The centre is dominated by vehicles with heavy levels of traffic throughout. There are few pedestrian crossings in the centre which exacerbates the dominance of vehicles in the area, e.g. there is only one pedestrian crossing on Bruce Grove, at the junction with Elmhurst Road, with the next crossing at the junction with High Road. The pavements were also narrower along Bruce Grove. Consequently, pedestrian flows are constrained in this part of the centre. Pedestrian flows are heaviest in the primary shopping area on High Road.

There was some evidence of graffiti in the centre, but not significant. Some parts of the centre contained litter; most notably there were cigarette ends and chewing gum on the pavements. A few telephone boxes in the centre were damaged. Overall, the centre felt safe and there was no other evidence of antisocial behaviour or begging. The centre has limited green space but there are a few trees and potted plants.

Reported crime

Recorded crime within the Bruce Grove Metropolitan Police neighbourhood was 2,049 from July 2020-June 2021, lower than the average for the six town centres (2,464 crimes). Antisocial behaviour represented 32% of total crimes, followed by violence and sexual offences (23%) and vehicle crime (16%).

Summary of Bruce Grove/Tottenham High Road's Strengths and Weaknesses

Strengths

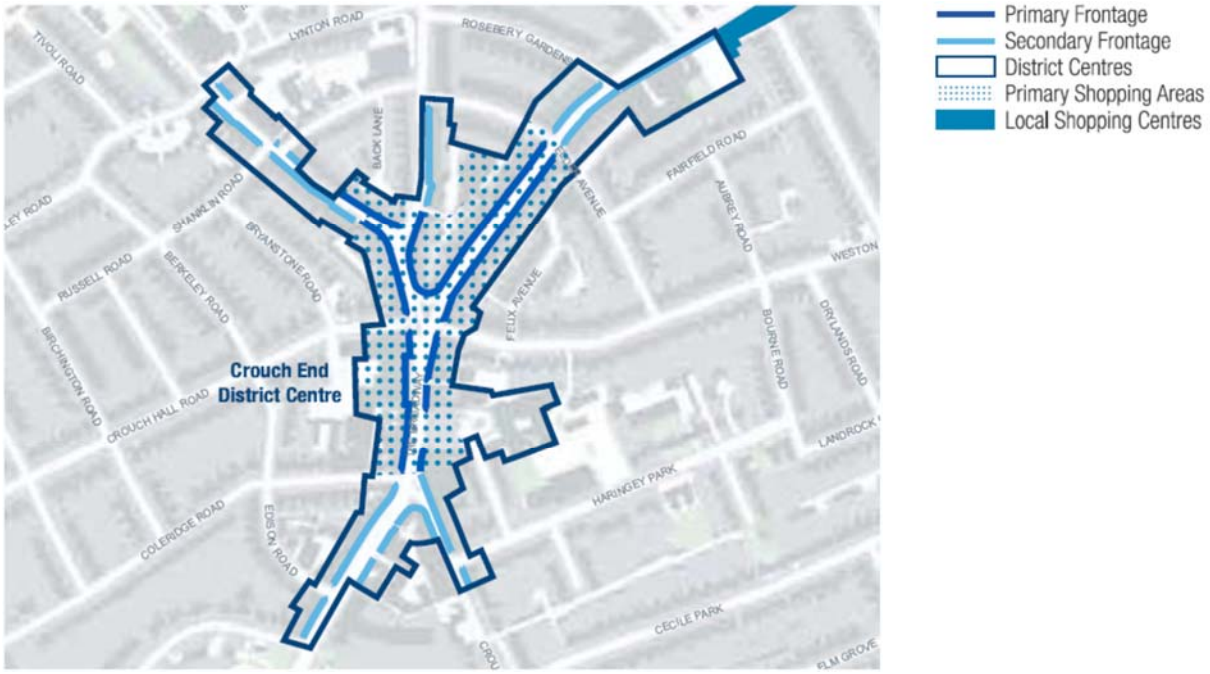
- High proportion of convenience retail units compared with national and London averages, including three large supermarkets (Aldi, Asda and Iceland) providing good food and grocery provision for both main and top-up food shopping.
- A good range of non-retail services, similar to the national average.
- Vacancy rates slightly lower than national average.
- Good levels of public transport accessibility.
- A loyal local customer catchment.

Weaknesses

- Limited number and selection of comparison retailers and very few multiple comparison retailers.
- Rates least favourably in terms of shop range with a high proportion of survey respondents selecting the category 'poor range of shops'.
- Low proportion of pubs/bars and the London Plan does not classify its night-time activity status. However, the centre has a higher proportion of fast food/takeaways compared with the national average. The evening economy could be significantly improved.
- Low proportion of hairdressers/beauty parlours.
- Traffic/congestion (14%) – has an adverse effect on shopping environment.
- The London Plan suggests only low commercial growth potential.
- The quality of the shopping environment could be improved.

Crouch End District Centre

Crouch End is in the south west of the Borough and is identified as a 'District Centre' in the London Plan. The centre is focused around the convergence of five main roads i.e. Crouch End Hill, Crouch Hill, Park Road, Middle Lane and Broadway Lane/Tottenham Lane, into The Broadway at the centre of Crouch End. The retail frontages are reasonably compact with units along these main roads all located close to the retail frontages on The Broadway. There are additional shops and services to the north west/top of Park Road, but these are not included within the designated centre boundary. The centre is characterised by largely Victorian buildings with the iconic Crouch End Clock Tower location at its centre. Crouch End town centre is bounded on all sides largely by residential areas. The main primary shopping area in Crouch End centre is located primarily along The Broadway, but with outlets also in Broadway Lane/Tottenham Lane Road. The secondary shopping area is located along Crouch End Hill, Crouch Hill, Park Road, Middle Lane and the top end of Broadway Lane/Tottenham Lane.



Crouch End district centre's key roles include:

- convenience shopping – Tesco Express, the Co-op and Waitrose are located on The Broadway. M&S Simply Food store is located on Crouch End Hill; however, this is just outside of the centre boundary. These stores are supported by bakers (x5), butchers (x2), green grocers (x2), newsagents (x2), off licenses(x2), a fishmonger, a health food store and independent convenience stores.
- comparison shopping – small independent specialist retailers and charity shops, with a limited number of multiple retailing shops selling a range of higher and lower order comparison goods;
- services – a good range high street national banks/building societies, many estate agent's, cafés, dry cleaners; and hairdressers/beauty parlours;
- entertainment and evening economy – a good choice of restaurants and pubs/bars but limited choice of hot food takeaways;
- community facilities – including the town hall, dentists, doctors' surgeries and gyms.

Mix of use and occupier representation

Crouch End has 210 retail and service units (source: Crouch End land use survey 2020). The diversity of uses within Crouch End is set out in Table CE1, compared with the Goad Plan national average and the GLA Town Centre Data 2017 average for London.

Table CE1 - Mix of shops/service uses in Crouch End

Type	Number units	% units	GLA London average	UK average
Comparison goods retail	68	43.0	37.7	29.7
Convenience goods retail	25	10.9	12.8	9.1
Financial/professional services	25	9.8	14.7	9.3
Other non-retail services	42	17.9		16.5
Restaurants/cafés	39	16.6	14.9	9.9
Pubs/bars	7	3.0	3.8	4.8
Hot food takeaways	4	1.7	7.4	6.1
Vacant	25	10.6	8.6	14.6
Total	**235**	**100.0**	**100.0**	**100.0**

Source: LDC's Crouch End land use survey 2020 (former Class A uses only), GLA 2017 London Town Centre Data and Experian Goad Plan national averages.

Crouch End has a higher proportion of comparison retail units compared with the national and London average and has a significantly lower proportion of hot food takeaways. There were 25 vacant retail units within Crouch End at the time of the LDC's 2020 survey, equating to a vacancy rate of 10%, which is higher than the London average but lower than the UK average. The Council's more recent survey in September 2021 suggests only 17 vacant units in the centre. Crouch End has a reasonable selection of comparison shops (68 units) and there are only two Goad goods categories not represented, but the choice in some categories is limited. Table CE2 provides a breakdown of comparison units by category.

Table CE2 - Mix of comparison goods shops – Crouch End

Type	Number Units	% units	UK Average
Clothing and footwear	8	11.8	21.5
Furniture, carpets and textiles	4	5.9	7.6
Books, arts, cards and stationers	7	10.3	7.7
Electrical, music and photography	8	11.8	9.1
DIY, hardware and homeware	6	8.8	6.6
China, glass and gifts	3	4.4	5.3
Cars, motorcycles and accessories	0	0.0	1.3
Chemists, drug stores and opticians	12	17.6	11.7
Variety, department and catalogue	0	0.0	1.8
Florists, nurserymen and seedsmen	2	2.9	2.2
Toys, hobby, cycle and sports	3	4.4	5.3
Jewellers	1	1.5	5.0
Charity and second-hand shops	11	16.2	9.9
Other comparison goods retailers	3	4.4	5.0
Total	**68**	**100.0**	**100.0**

Source: LDC's Crouch End land use survey 2020 and Experian Goad Plan national averages.

Compared with the national average, the proportion of units in several categories is lower in Crouch End. These categories include clothing/footwear; furniture/carpets and textiles; china/glass and gifts; toys/ hobby/cycle and sports; jewellers and other comparison goods retailers. Crouch End has a high provision of chemists and charity shops. The proportion of books/arts/cards and stationers; electrical/music and photography; DIY/hardware and homeware; florists/nurserymen and seedsmen and charity/second-hand shops are higher than the national average.

The number of multiple comparison retailers (excluding charity shops) is relatively limited. Most comparison units are operated by small independent traders. The multiple comparison retailers include:

Table CE3 – Crouch End's comparison multiples

Boots Chemist	BT	EE	Jojo Maman Bebe
Oliver Bonas	Specsavers Opticians	Superdrug	Waterstones

Source: Crouch End land use survey 2020

Crouch End has a good range and choice of service uses (117 in total), with only one of the categories (travel agents) not represented, as shown in Table CE4. This is lower number than Wood Green and West Green Road/Seven Sisters but is higher than Bruce Grove/Tottenham High Road, Green Lanes and Muswell Hill. There are a considerably lower proportion of fast food/takeaways but a good provision of restaurants/cafés when compared with the national average. The food/beverage sector is also dominated by independent operators and the only multiple food/beverage outlets are Costa and Pizza Hut Delivery. The food/beverage uses include 30 restaurants, 7 cafés, 2 coffee shops, 4 takeaway outlets, 7 pubs/bars, which provide a mix of daytime and night-time facilities.

Table CE4 - Mix of service uses – Crouch End

Type	**Number units**	**% units**	**UK Average**
Restaurants/cafés	39	37.5	23.8
Fast food/takeaways	4	3.8	14.7
Pubs/bars	7	6.7	11.7
Banks/other financial services	6	5.8	8.6
Betting shops/casinos/amusement	3	2.9	3.8
Estate agents/valuers	15	14.4	7.9
Travel agents	0	0.0	1.7
Hairdressers/beauty parlours	27	26.0	26.1
Launderettes/dry cleaners	3	2.9	1.7
Sub-total	**104**	**100.0**	**100.0**
Other	13		
Total	**117**		

Source: Crouch End land use survey 2020 and Experian Goad Plan national averages.

Commercial rents

According to the VOA, Zone A retail rents vary significantly throughout the centre. Zone A rents range from £800 to £950 per sq.m in the prime pitch along the Broadway in the central section of the centre. The centre's prime pitch rental levels are higher than Bruce Grove/Tottenham High Road and West Green Road/Seven Sisters but lower than Muswell Hill and Wood Green. Along Crouch End Hill rents are much lower at around £575 per sq.m. Zone A retail rents range from between £461 and £570 per sq.m along Crouch Hill. On the periphery of Park Road, Zone A retail rents are around £650 and £675 respectively.

Catchment area

Crouch End's local catchment area (the Crouch End Neighbourhood) includes the wards of Hornsey, Stroud Green and Crouch End. There are relatively low levels of deprivation in the area. However, Hornsey is one of the 10% most deprived areas in the country and the Campsbourne Estate is amongst the 5% most deprived areas in England.

The household survey results indicate 35% of respondents across the study area had used shops and services in Crouch End in the last year, the same percentage as Muswell Hill, which is higher than West Green Road/Seven Sisters and Bruce Grove/Tottenham High road, but lower than Wood Green and Green Lanes. However, a high proportion (77%) living in the local area (Zone 2) had visited the centre. Only 1.2% of respondents indicated that they do most of their non-food shopping in Crough End, significantly below Wood Green (14%) and Tottenham Hale Retail Park (5%). The retail capacity analysis suggests Crough End attracts most trade (61%) from Zone 2. The centre has a relatively localised, but loyal catchment area.

London Plan indicators

The London Plan (Policy SD8) sets out the network of centres and provides indicators for individual centres within the network. Crouch End's designations are:

- Network classification: District centre
- Night-time classification: NT3 (local significance)
- Commercial growth potential: Low (low levels of retail, leisure or office demand)
- Residential growth potential: Incremental
- Office guidelines: None
- Strategic area for regeneration: No

Customer views

As part of the household survey, respondents were asked if they had used shops and services in Crouch End in the last year. Of those who had used shops/services in Crouch End, respondents were asked what they like and dislike about Crouch End town centre. Around 26% like Crouch End because it is considered to have a good range of shops. The other main factors mentioned (5% of respondents or more) were:

- *factors liked*: shopping environment (25%); good choice of shops in general (23%); close to home (15%); good quality shops (14%); nothing/none mentioned (12%); choice of places to eat and drink (11%); maintenance/cleanliness (9%); independent retailers (8%); bus services (6%) and supermarkets (5%).
- *factors disliked*: nothing/none mentioned (50%); car parking (12%) and traffic congestion (6%)

The results suggest that people's views on Crouch End were mostly positive as 50% of respondents did not mention anything they disliked about the centre. Crouch End rates favourably in terms of environmental factors, similar to Muswell Hill. However, it rates less favourably in terms of car parking and traffic congestion.

Stakeholder feedback

A selection of stakeholders were asked about their views on town centres in the Borough. Feedback relating to Crouch End suggests the centre has a "strong" and "steady" trading performance. The key strengths and weakness suggested were:

- *Strengths*: a strong local shopping destination with a village feel; varied selection of independent and multiple chain outlets.

- *Weaknesses*: the road layout and car parking; increasing number of vacant units and the need for a more proactive approach to reusing these units; and loss of office space and absence of space for hot-desking; need for more consultation with local stakeholders.

Accessibility

Public Transport Accessibility Levels (PTAL) are Level 3 across the centre (Source: Haringey Strategic Policies Local Plan), suggesting lower levels of accessibility than the other main centres in the Borough. However, the household survey results suggest Crouch End attracts customers by a variety of means of transport. Mode of travel for food shopping within the local area (Zone 2) is relatively similar to the study area average with the highest proportions doing their main food shopping by car (44%) or walking (35%). For non-food shopping, Crouch End attracts a good mix of car, bus and walking customers. A small number of customers travel by underground (6%) and none by train. The survey results also indicated higher levels of dissatisfaction with car parking provision than satisfaction i.e. 10% compared with 2%. However, more respondents mentioned bus services as a positive rather than a negative factor (5% compared with less than 1%).

Crouch End town centre has limited public transport accessibility when compared with the other main centres in the Borough. The centre is not directly served by underground or over ground railway lines but is still reasonably well served by bus routes. Buses provide good access to other centres within the Borough and other parts of London including Kings Cross Station and Trafalgar Square/Charing Cross Station. Bus routes which serve the centre include numbers 41, 91, W5 and W7. The centre is also served by two night bus routes i.e. N41 and N91.

Crouch Hall Road Car park is located to the west of the main road but is just outside of the centre boundary designation. This offers only 12 spaces and is open Mon - Sat, 8am to 6.30pm. There is on-street parking available. The centre and surrounding area falls within two different parking zones in Haringey, Crouch End A and B, where pay and display is required (£3.30 per hour), and varying restrictions apply. Zone A operates from 10am-12pm and zone B operates from 2-4pm.

Environment quality

The quality of buildings within Crouch End centre is predominantly very good. The architectural continuity of many of the buildings at upper floors is an attractive feature of the centre. The Victorian buildings along the Broadway enhance the character of the centre and the modern infill developments do not significantly detract from the environmental quality. The centre has several listed buildings, adding to the architectural significance of the centre. The Clock Tower (Grade II Listed) provides an architectural focus for the primary area and acts as a historical piece of public art. Crouch End Hippodrome is another focal point, situated on Broadway Parade/Tottenham Lane, which originally opened as the Queen's Opera House in 1897 and now operates as a gym. The Grade II* Listed Hornsey Town Hall located in the centre is the focal point of a large-scale restoration and mixed-use redevelopment (Hornsey Town Hall Square) comprising residential use, a hotel, arts activity, workspace and related uses. Construction is underway and the development is due to open in Autumn 2021.

There is a moderate to high level of traffic flow through the centre. This is concentrated most heavily at the Clock Tower and primary shopping frontage area. Despite this, there are an adequate number of pedestrian crossings and wide, good quality pavements throughout the centre. Pedestrian flows are heaviest the primary shopping areas, near the clock tower. There were no clusters of vacant building.

Overall, during the daytime the centre felt safe and there was no evidence of anti-social behaviour or begging. There was also limited evidence of graffiti, vandalism or litter within the centre. The centre has limited green spaces, but some pavements are lined with large plant pots that are visually appealing and create a buffer between the pedestrians and road vehicles.

Reported crime

Recorded crime within the Crouch End Metropolitan Police neighbourhood was 1,428 from July 2020 – June 2021, the second lowest of the six town centres in the Borough. Antisocial behaviour represented 31% of total crimes, followed by violent and sexual offences (16%) and vehicle crime (12%).

Summary of Crouch End's Strengths and Weaknesses

Strengths

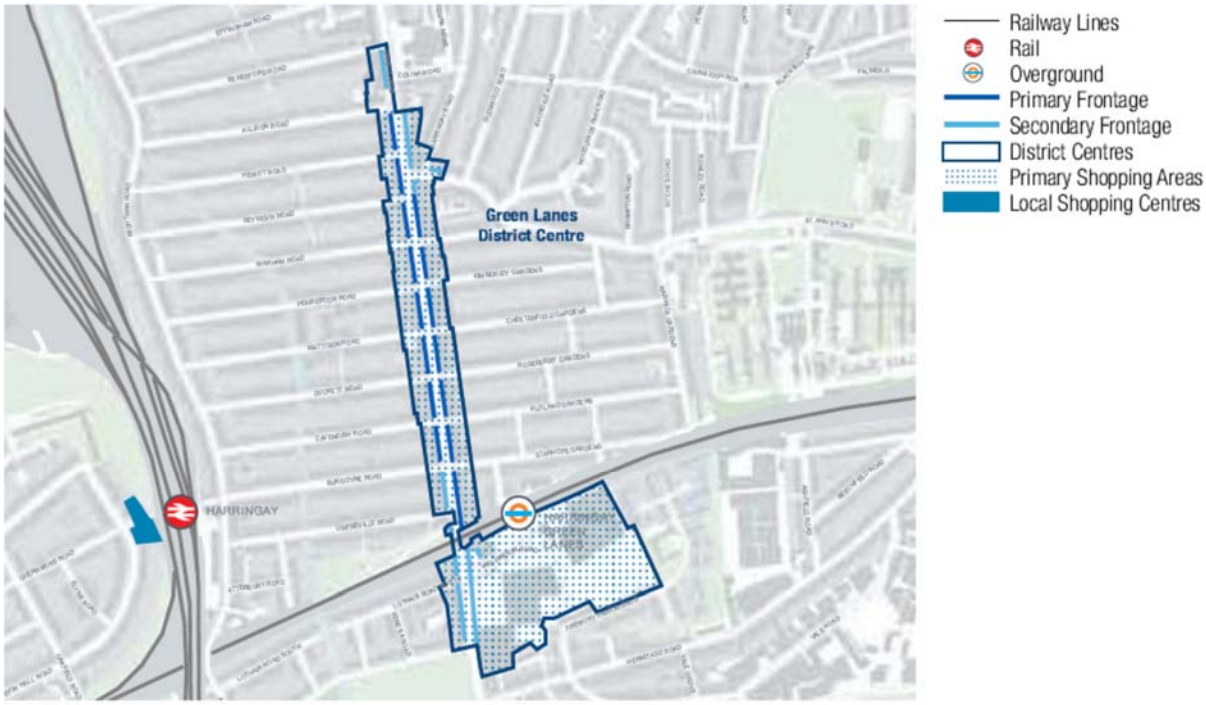
- Four food supermarkets (the Co-op, Waitrose and M&S Simply Food).
- Good range of services including many restaurants/cafés and pubs/bars providing a good mix of daytime and night-time facilities. The evening economy is identified in the London Plan with a night-time classification of local significance.
- Attractive centre with a village feel, which appears to be trading healthily.
- High quality and consistent architecture throughout the centre which creates a pleasant and attractive shopping environment.
- Regeneration project under construction which will provide new community uses to the centre, despite not being classified as a strategic area for regeneration in the London Plan.
- Relatively high levels of customer satisfaction when compared with other centres.
- Relatively low levels of crime compared with other centres in the Borough.

Weaknesses

- A relatively high proportion of charity shops.
- Limited public transport accessibility and car parking provision, when compared with other centres in the Borough.
- Vacancy rates higher than other centres in the Borough although still lower than the national average.
- Very few multiple comparison retailers.

Green Lanes District Centre

Green Lanes is in the south of the Borough and is identified as a 'District Centre' in The London Plan. The linear centre stretches along Green Lanes from the junction of Endymion Road, near Finsbury Park, in the south, to the junction with Beresford Road in the north. The district centre also includes Arena Shopping Park and retail units off Williamson Road, on the sites of the former Harringay Stadium and Arena. The shopping park includes several large format units occupied by national multiple retailers and provides a significantly different retail offer to the rest of Green Lanes. The centre is predominantly bound by residential areas. Further to the north lies Wood Green Metropolitan centre and Turnpike Lane underground station. The main primary shopping area in Green Lanes is between the junctions of Salisbury Road and Stanhope gardens. The primary frontage extends south to the railway station on the east side of the road and north on the west side of the road to the junction with Alison road. The secondary shopping frontage covers the remainder of the centre apart from the shopping park. At the time of this study, there was a slight cluster of vacancies around Salisbury Road (x4 units).



Green Lanes district centre's key roles include:

- convenience shopping – large Sainsbury's store suitable for main and bulk food shopping located in the Arena Shopping Park and an Iceland suitable for main shopping located on the high street. These stores area supported by bakers (x7), confectioners (x2), newsagents (x2), a butcher, a delicatessen, a greengrocer, an off license and independent convenience stores.
- comparison shopping – small independent specialist retailers, with a limited number of multiple retailing shops selling a range of higher and lower order comparison goods;
- services – a good number of cafés, fast food/takeaways, estate agents and betting shops/casinos/amusement. Limited range of travel agents, laundrettes/dry cleaners and only 1 high street national bank (Barclays).
- entertainment and evening economy – a good number of restaurants (9/15 are Turkish) but only 3 pubs/bars; and

- community facilities – including 4 dentists, one doctors surgery and a gym. St Ann's hospital is located just outside of the centre boundary.

Mix of use and occupier representation

Green Lanes has a total of 167 retail and service units (source: land use survey 2020). The diversity of uses within Green Lanes is set out in Table GL1, compared with the Goad Plan national average and the GLA Town Centre Data 2017 average for London.

Table GL1 - Mix of shops/service uses in Green Lanes

Type	Number units	% units	GLA London average	UK average
Comparison goods retail	44	26.3	37.7	29.7
Convenience goods retail	25	15.0	12.8	9.1
Financial/professional services	20	12.0	14.7	9.3
Other non-retail services	25	15.0		16.5
Restaurants/cafés	21	12.6	14.9	9.9
Pubs/bars	3	1.8	3.8	4.8
Hot food takeaways	11	6.6	7.4	6.1
Vacant	18	10.8	8.6	14.6
Total	**167**	**100.0**	**100.0**	**100.0**

Source: Green Lanes land use survey 2020 (former Class A uses only), GLA 2017 London Town Centre Data and Experian Goad Plan national averages.

Green Lanes centre has a higher proportion of convenience goods retail units compared with the national and London averages, but lower proportions of other non-retail services and pub/bars. There were 18 vacant retail units within Green Lanes at the time of the LDC's 2020 survey, a vacancy rate (10.5%). The shop vacancy rate is higher than the London average but lower than the national average. The Council's more recent survey in September 2021 suggests only 12 vacant units in the centre. The selection of comparison shops is limited (44) compared with Wood Green, Muswell Hill and Crouch End. Table GL2 provides a breakdown of comparison units by category.

There are three categories which are not represented i.e. china, glass and gifts; cars, motorcycles and accessories; florists, nurserymen and seedsmen. Green Lanes has a significantly high proportion of jewellers and electrical, music and photography; DIY, hardware and homeware; chemists, drug stores and opticians; variety, department and catalogue and other comparison goods retailers are all above the national average. However, clothing and footwear; furniture, carpets and textiles; books, arts, cards and stationers; toys, hobby, cycle and sports; charity and second-hand shops are all below the national average.

The number of multiple comparison retailers (excluding charity shops) is relatively limited and reflects Green Lanes size and role. Most comparison shops are small independent traders. All but one of the multiple comparison retailers are at Arena Shopping Park, as listed in Table GL3.

Green Lanes town centre has a good range of service uses (80 in total) with all the categories represented, as shown in Table GL4. This is a lower number than Wood Green, West Green Road/Seven Sisters and Crouch End but is higher than Bruce Grove/Tottenham High Road and Muswell Hill.

Table GL2 - Mix of comparison goods shops – Green Lanes

Type	Number Units	% units	UK Average
Clothing and footwear	4	9.1	21.5
Furniture, carpets and textiles	3	6.8	7.6
Books, arts, cards and stationers	1	2.3	7.7
Electrical, music and photography	6	13.6	9.1
DIY, hardware and homeware	5	11.4	6.6
China, glass and gifts	0	0.0	5.3
Cars, motorcycles and accessories	0	0.0	1.3
Chemists, drug stores and opticians	7	15.9	11.7
Variety, department and catalogue	2	4.5	1.8
Florists, nurserymen and seedsmen	0	0.0	2.2
Toys, hobby, cycle and sports	1	2.3	5.3
Jewellers	10	22.7	5.0
Charity and second-hand shops	2	4.5	9.9
Other comparison goods retailers	3	6.8	5.0
Total	**44**	**100.0**	**100.0**

Source: Green Lanes land use survey 2020 and Experian Goad Plan national averages.

Table GL3 – Green Lanes comparison multiples

Dreams Bed	Homebase	Poundland	Savers
Sports Direct	Superdrug	TK Maxx	

Source: Green Lanes land use survey 2020

There are a reasonable proportion of restaurants/pubs but a low proportion of hairdressers/beauty parlours when compared with the national average. Multiple food/beverage outlets are limited but there is a Costa, McDonalds, Papa John's and Pizza Hut Delivery. The food/beverage uses include 15 restaurants, 5 cafés and 1 coffee shop, 3 pub/bars and 11 fast food/takeaways which provide a mix of daytime and night-time facilities.

Table GL4 - Mix of service uses – Green Lanes

Type	Number units	% units	UK Average
Restaurants/cafés	21	30.0	23.8
Fast food/takeaways	11	15.7	14.7
Pubs/bars	3	4.3	11.7
Banks/other financial services	5	7.1	8.6
Betting shops/casinos/amusement	5	7.1	3.8
Estate agents/valuers	8	11.4	7.9
Travel agents	3	4.3	1.7
Hairdressers/beauty parlours	11	15.7	26.1
Launderettes/dry cleaners	3	4.3	1.7
Sub-total	**70**	**100.0**	**100.0**
Other	10		
Total	**80**		

Source: Green Lanes land use survey 2020 and Experian Goad Plan national averages.

Commercial rents

According to the VOA, Zone A retail rents vary significantly throughout the centre. Along the primary frontage sections of the centre, Zone A rents of between £475 and £507 per sq.m are achieved. The centre has the second lowest prime pitch rental levels of the six centres in the Borough. Zone A retail rents are around £475 per sq.m by Harringay Green Lanes railway station in south, and around £400 per sq.m on the northern boundary of the centre.

Catchment area

Green Lanes' Local catchment area includes the wards of St Ann's and Harringay. Approximately 18% of the community live in areas that fall into the 10% of most deprived areas of the country, as indicated in the Local Plan Strategic Policies (2013).

The household survey results indicate 38% of respondents across the study area had used shops and services in Green Lanes in the last year, which was the second highest percentage for the six main town centres in the Borough. Around 54% living in the local area (Zone 4) had visited the centre. Only 1.9% of respondents indicated that they do most of their non-food shopping in Green Lanes (including Arena Park), significantly below Wood Green (14%) and Tottenham Hale Retail Park (5%).

The retail capacity analysis suggests Green Lanes attracts just over a third of its trade from Zone 4. The centre has a less localised catchment area when compared with other District Centre in the Borough due to facilities at Arena Park, which help to attract customers from further afield.

London Plan indicators

The London Plan (Policy SD8) sets out the network of centres and provides indicators for individual centres within the network. Green Lane's designations are:

- Network classification: District centre
- Night-time classification: NT3 (Local Significance)
- Commercial growth potential: Medium (moderate levels of retail, leisure or office demand)
- Residential growth potential: High
- Office guidelines: None
- Strategic area for regeneration: Yes

Customer views

As part of the household survey, respondents were asked if they had used shops and services in Green Lanes in the last year. Of those who had used shops/services in Green Lanes, respondents were asked what they like and dislike about Green Lanes town centre. Similar to other town centres, 24% of respondents like Green Lanes due to the range of shops available there. The main factors mentioned (5% of respondents or more) were:

- *factors liked*: choice of places to eat and drink (18%); good choice of shops in general (16%); close to home (16%); nothing/none mentioned (14%); supermarkets (8%) and shopping environment (8%).
- *factors disliked*: nothing/none mentioned (43%); traffic/congestion (22%); car parking (12%); unsafe/crime rate (7%); maintenance/cleanliness (6%) and poor choice of shops in general (5%).

The results suggest there are mixed views regarding the shopping environment in Green Lanes. The centre rates least favourably in terms of traffic/congestion when compared with the other centres.

Stakeholder feedback

A selection of stakeholders were asked about their views on town centres in the Borough. Feedback relating to Green Lanes suggests the centre has a "relatively strong" and "steady" trading performance. The key strengths and weakness suggested were:

- *Strengths*: focus for Turkish shops, cuisine and services; Outer London Fund improvements to the public realm, gateways and shop fronts.
- *Weaknesses*: planning policy restrictions on non-retail uses; traffic congestion; lack and cost of car parking; need for contactless parking payment; lack of servicing/loading access; potential impact of any future Low Traffic Neighbourhoods (LTN); lack of co-ordination and cross working with other centres; poor street cleanliness; high crime levels; need for a BID or other local funding streams to address lack of funding to resolve issues.

Accessibility

Public Transport Accessibility Levels (PTAL) range from Level 3 to Level 5 across the centre (Source: Haringey Strategic Policies Local Plan), with accessibility highest in the southern section of the centre.

The household survey results suggest Green Lanes attracts customers by a variety of means of transport. Mode of travel for food shopping with the local area (Zone 4) is similar to the study area average with the highest proportions doing their main food shopping by car (43%) or walking (32%). For non-food shopping, Green Lanes attracts a good mix of car, bus, train/underground and walking customers, which suggests high levels of accessibility. The survey results also indicated a higher level of satisfaction with car parking provision than dissatisfaction (12% compared with 3%). Slightly more respondents mentioned bus services as a positive rather than a negative factor (4% compared with 2%).

Green Lanes town centre has relatively good public transport accessibility. Harringay Green Lanes railway station is located at the south end of the centre, just north of the Arena Shopping Park and Williamson Road. The station has regular trains on the Gospel Oak to Barking Line (east-west across north London) which operate quarter-hourly in each direction. Approximately 0.5 miles north of the centre, outside of the town centre boundary, is Turnpike Lane underground station which is served by the Piccadilly line with services towards Cockfosters, Heathrow and Uxbridge.

Green Lanes town centre is served by three bus routes providing good access to other centres within the Borough and other parts of London including Trafalgar square/Charing cross, London Bridge and Waterloo. Bus routes which serve the centre are numbers 29, 141, 341 and N29 night bus route.

The main car park serving the centre is the Arena Shopping Park car park which located south of the railway line, adjacent to the secondary frontages. This provides free parking for a maximum of 2.5 hours. There is also on-street parking surrounding Green Lanes. These parking zones generally restrict parking to resident permit holders between 8am-6:30pm Monday to Saturday; however, there is pay and display for visitors (£3.30 per hour).

Environment quality

The quality of buildings within Green Lanes town centre is largely very good. The primary shopping area contains several attractive Victorian buildings at upper floors which have more modern shop frontages. The shop fronts are well kept throughout. The modern appearance of the retail park does not detract from the overall environmental quality of the centre. There have been several recent improvements to the centre since the previous study including: new paving and planting, amendments to junctions to improve safety for pedestrians and cyclists, a new pedestrian crossing at the junction with Falkland Road, a new 'pocket park' between Allison Road and St Ann's Road providing seating for visitors to rest and improvements to the railway bridge.

Green Lanes town centre is largely dominated by traffic as the retail units are distributed on either side of the A105 which runs directly through the centre. Traffic flows are heavy throughout the centre but are most concentrated around the southern boundary where the main car park is located. Movement in and around the centre is an issue due to the largely linear non-pedestrianised structure of the centre along with high volumes of traffic. Pedestrian flows are heaviest in the primary shopping areas, around the railway station and the Arena Shopping Park. The pavements are relatively wide, paving is in good condition and there are an adequate number of pedestrian crossings throughout.

There was limited evidence of graffiti or vandalism within the centre. The primary and secondary shopping areas contained small amounts of litter, mainly chewing gum, cigarette butts and a few overfull rubbish bins. Overall, the centre felt safe during the daytime and there was no evidence of antisocial behaviour or begging. Railway Fields Nature Park is located opposite the railway station although this is just outside of the centre boundary. The centre has limited open space, however Finsbury Park is located just south of the centre boundary, opposite Endymion Road. Duckett's common is approximately 0.3 miles north of the centre boundary.

Reported crime

Green Lanes town centre falls within both Harringay police neighbourhood and St Ann's. The police neighbourhoods are either side of the high street. Recorded crime within the two neighbourhoods relatively similar. Harringay police neighbourhood had 2,316 reported crimes from July 2020 – June 2021, 43% of these were related to anti-social behaviour, 17% violence and sexual offences and 10% vehicle crime. St Ann's police neighbourhood had 2,346 reported crimes from July 2020 – June 2021, 35% of these were related to anti-social behaviour, 21.6% violence and sexual offences, 11.7% vehicle crime. The average crime rate for the centre was 2,331, just below the average for the six town centres of 2,464 crimes.

Summary of Green Lanes Strengths and Weaknesses

Strengths

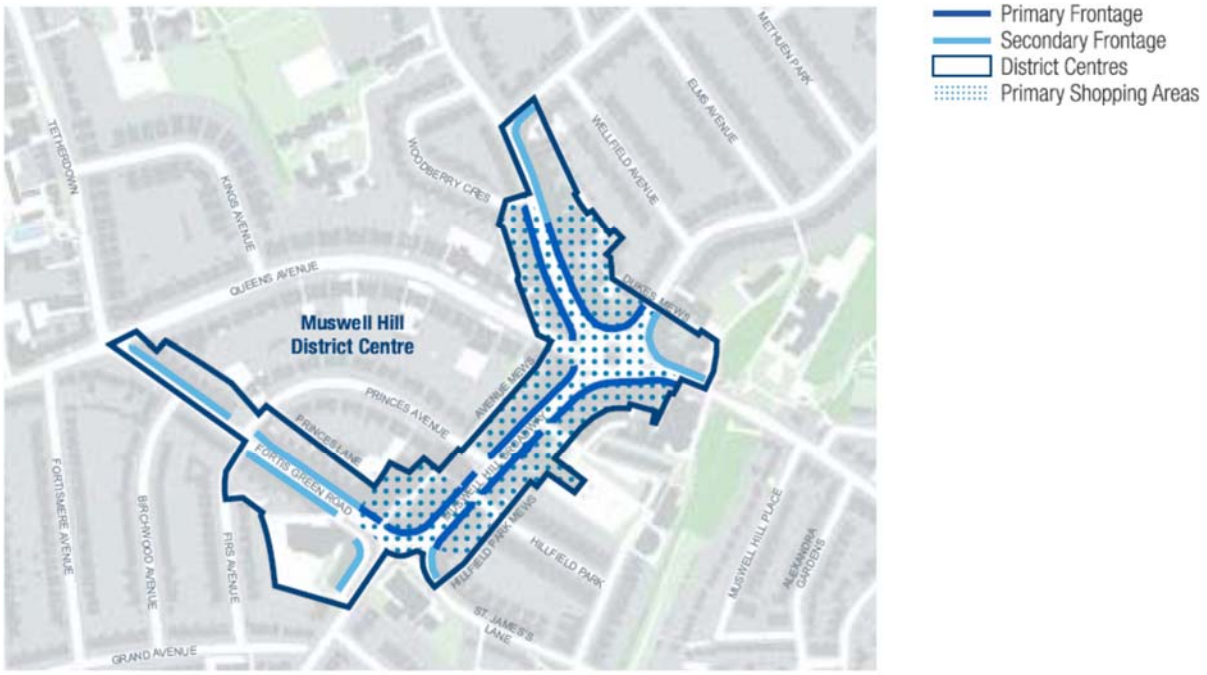
- Two large supermarkets (Sainsbury's and Iceland) and good food and grocery provision suitable for both main and top-up food shopping.
- The London Plan suggests high potential for residential growth.
- Arena Shopping Park contains large format units occupied by national multiple retailers providing a complementary shopping offer to the primary shopping area, which helps to attract customers from a wide area.
- A good range of non-retail service facilities including estate agents. The provision of restaurants/cafes is significantly higher than the national average.

Weaknesses

- The linear structure of the centre does not provide a natural circuit for pedestrians.
- Limited number and selection of comparison retailers and very few multiple comparison retailers.
- A limited range of travel agents, laundrettes/dry cleaners and banks.
- Rated least favourably in terms of traffic/congestion by survey respondents.
- The shop vacancy rate is higher than other centres in the Borough, although still lower than the national average.

Muswell Hill District Centre

Muswell Hill is in the west of the Borough and is identified as a 'District Centre' in The London Plan. The district centre is located along Muswell Hull Broadway and Fortis Green Road. The retail frontages are reasonably compact with the units along Muswell Hill Broadway and Fortis Green all close to the central junction of Muswell Hill Broadway, Queens Avenue and Muswell Hill, which is an open roundabout. Muswell Hill is characterised by distinctive Edwardian, red brick parades of shops. The primary shopping frontage in Muswell Hill extends along the majority of Muswell Hill Broadway. A small area of primary frontage extends up Fortis Green Road and down Muswell Hill. The remainder of the centre is designated as secondary shopping frontage.



Muswell Hill District Centre is located within the Muswell Hill Conservation Area with parts also in an Area of Archaeological Interest. The District Centre is bounded by predominantly residential areas, with Alexandra Park a short distance to the east. Muswell Hill district centre's key roles include:

- convenience shopping – three medium sized food stores operated by Sainsbury's, M&S and Planet Organic. These stores are supported by bakers (x5), health food stores (x3), newsagents (x2), green grocers (x2), an off licence, a butcher, a fishmonger and a tea and coffee merchant. There are also convenience stores including a Little Waitrose and a COOK store;
- comparison shopping – a mix of multiple and independent comparison retailers and charity shops, selling a range of higher and lower order comparison goods;
- services – an excellent range of restaurants/cafés. Also, a good range of high street national banks/building societies, estate agents/valuers and laundrettes/dry cleaners.
- entertainment and evening economy – a good choice of restaurants but limited pubs/bars; and
- community facilities – including a cinema, three dentists, one health clinic, four health/sports clubs (gyms) and a party venue/function room. The library is just outside the designated centre boundary.

Mix of use and occupier representation

Muswell Hill has 193 retail and service units (source: Muswell Hill land use survey 2020). The diversity of uses within Muswell Hill is set out in Table MH1, compared with the Goad Plan national average and the GLA Town Centre Data 2017 average for London.

Table MH1 - Mix of shops/service uses in Muswell Hill

Type	Number units	% units	GLA London average	UK average
Comparison goods retail	83	43.0	37.7	29.7
Convenience goods retail	21	10.9	12.8	9.1
Financial/professional services	19	9.8	14.7	9.3
Other non-retail services	23	11.9		16.5
Restaurants/cafés	29	15.0	14.9	9.9
Pubs/bars	4	2.1	3.8	4.8
Hot food takeaways	3	1.6	7.4	6.1
Vacant	11	5.7	8.6	14.6
Total	**193**	**100.0**	**100.0**	**100.0**

Source: Muswell Hill land use survey 2020 (former Class A uses only), GLA 2017 London Town Centre Data and Experian Goad Plan national averages.

Muswell Hill has a higher proportion of comparison retail uses and lower proportion of pubs/bars compared with the national and London averages. The centre has a significantly lower proportion of hot food takeaways compared and other non-retail services. There were 11 vacant retail units within Muswell Hill at the time of the LDC's 2020 survey, a relatively low vacancy rate of 5.4%. The Council's more recent survey in September 2021 suggests only 9 vacant units in the centre. Muswell Hill has a reasonable selection of comparison shops (83), reflecting its role in the retail hierarchy. All Goad comparison categories are represented, but the choice in six of the categories is limited. Table MH2 provides a breakdown of comparison units by category.

Table MH2 - Mix of comparison goods shops – Muswell Hill

Type	Number Units	% units	UK Average
Clothing and footwear	15	18.1	21.5
Furniture, carpets and textiles	9	10.8	7.6
Books, arts, cards and stationers	8	9.6	7.7
Electrical, music and photography	6	7.2	9.1
DIY, hardware and homeware	5	6.0	6.6
China, glass and gifts	3	3.6	5.3
Cars, motorcycles and accessories	1	1.2	1.3
Chemists, drug stores and opticians	13	15.7	11.7
Variety, department and catalogue	1	1.2	1.8
Florists, nurserymen and seedsmen	1	1.2	2.2
Toys, hobby, cycle and sports	3	3.6	5.3
Jewellers	4	4.8	5.0
Charity and second-hand shops	11	13.3	9.9
Other comparison goods retailers	3	3.6	5.0
Total	**83**	**100.0**	**100.0**

Source: Muswell Hill land use survey 2020 and Experian Goad Plan national averages.

There is a higher proportion of chemists/ drug stores/opticians when compared with the national average and charity shops. The proportion of furniture/ carpets and textiles; books/ arts/ cards and stationers are also higher than the national average. The proportion of all other comparison retail categories was lower than the national average.

Muswell Hill has a reasonable number of multiple comparison retailers (excluding charity shops) for a District Centre. However, the centre still has a greater number of independent comparison traders. The multiple comparison retailers include:

Table MH3 – Muswell Hill's comparison multiples

Boots Chemist	Boots Opticians	Daniel Footwear	EE
Jigsaw	John Lewis	JoJo Mama Bebe	Moss Bros
Oliver Bonas	Pep&Co	Poundland	Snappy Snaps
Specsavers Opticians	Sweaty Betty	White Stuff	WHSmith
Wickes Kitchens and Bathrooms			

Source: Muswell Hill land use survey 2020

Muswell Hill has a reasonable range of service uses (78 in total), but this is the second lowest of the six main centres, as shown in Table MH4. The representation of most categories differs from the national average. There is a high proportion of restaurants/cafés and a low proportion of hairdressers/beauty parlours. The proportion of banks/other financial services; estate agents/valuers and laundrettes/dry cleaners are all higher than the national average. The proportion of fast food/takeaways; pubs/bars; betting shops/casinos/amusement and travel agents are all lower than the national average.

Multiple food/beverage outlets include Starbucks, Costa, Caffe Nero, Bill's, Miller and Carter, Cote and Franco Manca. The food/beverage uses include 17 restaurants, 8 cafés and 4 coffee shops, 4 pubs/bars and 3 fast food/takeaway outlets which provide a good mix of daytime facilities.

Table MH4 - Mix of service uses – Muswell Hill

Type	**Number units**	**% units**	**UK Average**
Restaurants/cafés	29	39.2	23.8
Fast food/takeaways	3	4.1	14.7
Pubs/bars	4	5.4	11.7
Banks/other financial services	9	12.2	8.6
Betting shops/casinos/amusement	2	2.7	3.8
Estate agents/valuers	9	12.2	7.9
Travel agents	1	1.4	1.7
Hairdressers/beauty parlours	14	18.9	26.1
Launderettes/dry cleaners	3	4.1	1.7
Sub-total	**74**	**100.0**	**100.0**
Other	4		
Total	**78**		

Source: Muswell Hill land use survey 2020 and Experian Goad Plan national averages.

Commercial rents

According to the VOA, Zone A retail rents vary throughout the centre. Along Muswell Hill Broadway Primary frontage Zone A retail rents of between £975 to £1,023 per sq.m are achieved. The centre has the second highest prime pitch rental levels of the six main centres in the Borough. On the periphery of Fortis Green and Muswell Hill Zone A retail rents are still relatively high ranging from £550 to £800 per sq.m.

Catchment area

Muswell Hill's local catchment area (the Muswell Hill Area Neighbourhood) includes the wards of Muswell Hill, Highgate, Alexandra and Fortis Green. These wards are relatively affluent with low levels of deprivation.

The household survey results indicate 35% of respondents across the study area had used shops and services in Muswell Hill in the last year, the same percentage as Crouch End, which is higher than West Green Road/Seven Sisters and Bruce Grove/Tottenham High road, but lower than Wood Green and Green Lanes. Around 81% living in the local area (Zone 2) had visited the centre. Only 1.2% of respondents indicated that they do most of their non-food shopping in Muswell Hill, significantly below Wood Green (14%) and Tottenham Hale Retail Park (5%).

The retail capacity analysis suggests Muswell Hill attracts nearly two thirds of its trade (64%) from Zone 2. The centre has a relatively localised catchment area when compared with Wood Green and some of the other district centres in the Borough.

London Plan indicators

The London Plan (Policy SD8) sets out the network of centres and provides indicators for individual centres within the network. Muswell Hill's designations are:

- Network classification: District centre
- Night-time classification: NT3 (Local Significance)
- Commercial growth potential: Low (low levels of retail, leisure or office demand)
- Residential growth potential: Incremental
- Office guidelines: None
- Strategic area for regeneration: No

Customer views

As part of the household survey, respondents were asked if they had used shops and services in Muswell Hill in the last year. Of those who had used shops/services in Muswell Hill, respondents were asked what they like and dislike about Muswell Hill town centre. About 26% of respondents like Muswell Hill because of its shopping environment. The main factors mentioned (5% of respondents or more) were:

- *factors liked*: good choice of shops in general (25%); good range of shops (21%); close to home (16%); good quality shops (14%); maintenance/cleanliness (10%); nothing/none mentioned (10%); choice of places to eat and drink (9%); bus services (7%); independent retailers (7%); supermarkets (6%) and good choice of clothing (6%).
- *factors disliked*: nothing/none mentioned (52%); car parking (16%); traffic/congestion (7%) and shops are too expensive (6%).

Over 50% of respondents did not mention anything they disliked about Muswell Hill town centre suggesting views on the centre are mostly positive. This rating is similar to Crouch End. Muswell Hill rates most favourably in terms of environmental factors with the highest score of all the centres.

Stakeholder feedback

A selection of stakeholders were asked about their views on town centres in the Borough. Stakeholders described Muswell Hill's current trading performance as "poor" or "very poor" and "declining". One described performance as "satisfactory" but "declining" or "relatively strong" and "steady". The key strengths and weakness suggested were:

- *Strengths*: attractive town centre including planting; affluent catchment area within walking distance; the strong community spirit; good provision of on and off-street car parking; no reliance on a large anchor tenant;
- *Weaknesses*: few opportunities for comparison retailing; some large vacant units; no underground station; absence of a large anchor tenant; low morale amongst businesses; impact of the Covid-19 pandemic; lack investment in the west side of the Borough; the absence of events to attract footfall; need for local business support, pop-up shops and hire space; more partnership needed with freeholders/landowner; need to remove unnecessary street furniture.

Accessibility

Public Transport Accessibility Levels (PTAL) range from Level 3 to Level 4 across the centre (Source: Haringey Strategic Policies Local Plan), the second lowest level of accessibility within the six main centres.

The household survey results suggest Muswell Hill attracts customers by a variety of means of transport. Mode of travel for food shopping within the local area (Zone 2) is relatively similar to the study area average with the highest proportions doing their main food shopping by car (44%) or walking (35%). For non-food shopping, Muswell Hill attracts a good mix of car, bus and walking customers. A small number of customers travel by underground (6%). The survey results also indicated significantly higher levels of dissatisfaction with car parking provision than satisfaction (i.e. 16% compared with 3%). However, more respondents mentioned bus services as a positive rather than a negative factor (7% compared with 2%).

Muswell Hill has limited public transport accessibility when compared with other centres. The centre does not have an underground or over ground railway line, but is well served by bus routes, providing good access to other centres within the Borough and other parts of London including London Bridge, Victoria, Kentish Town/Camden and Barnet. Bus routes which serve the centre include numbers 234, 299, 634, 43, 102, 134.

Muswell Hill town centre has one main car park; Fortis Green Road Car Park with approximately 67 spaces and is open 24 hours. Summerland Gardens car park is located behind M&S and Pace Computer repairs, with 90 car parking spaces. This car park has 2 Rapid EVCPs and is open Mon-Sat, 8am-6:30. The car park is located just outside of the designated centre but is accessed from Hillfield Park Road. Whilst the centre is not located within a CPZ, there are CPZs directly west of the centre where pay and display is required between 11am-1pm (£3.30 per hour), and varying restrictions apply.

Environment quality

The quality of buildings within Muswell Hill is predominantly good. The purpose-built Edwardian shopping parades create a high-quality shopping environment that is functional and attractive. The two main shopping streets Muswell Hill Broadway and Fortis Green Road still maintain their historic character with most of the original façades preserved above street level. The architectural continuity of many of these buildings at upper floors is an attractive feature of the centre and enhances the visual amenity of the town.

The centre has a high level of traffic, concentrated around the two roundabouts at either end of Muswell Hill Broadway. However, there are adequate pedestrian crossing and wide pavements in good condition throughout the centre. Pedestrian flows were heaviest in the primary shopping areas and in areas where food outlets provided outside seating. Directly opposite St James's Church, on Muswell Hill Road, is a particularly pleasant area with widened pavement and outdoor café/restaurant seating, street furniture and short stay cycle parking provision.

Overall, the centre felt safe during the daytime and there was no evidence of antisocial behaviour or begging. There was also no evidence of graffiti, vandalism or litter within the centre. The area has limited green space, but the centre is in close proximity to Alexandra Park. There are a few trees and purpose-built planting beds by the Muswell Hill Broadway/Fortis Green roundabout. At the corner of Fortis Green Road/Princes Avenue is a small garden seating area with public seating, planting and trees.

Reported crime

Muswell Hill town centre falls within both Muswell Hill and Fortis Green police neighbourhoods. The police neighbourhoods are split between the east and west sides of the centre and both include primary and secondary frontage. Recorded crime within the two neighbourhoods relatively similar. Muswell Hill police neighbourhood had 1,234 reported crimes from July 2020 – June 2021, 38% of these were related to anti-social behaviour, 15% violence and sexual offences and 12% vehicle crime. Fortis Green police neighbourhood had 1,181 reported crimes from July 2020 – June 2021, 37% of these were related to anti-social behaviour, 20% violence and sexual offences and 12% vehicle crime. The average crime rate for the centre was 1,208, the lowest of the six town centres in the Borough.

Summary of Muswell Hill's Strengths and Weaknesses

Strengths

- The shop vacancy rate is much lower than both the national and London average.
- A significantly higher proportion of restaurants/café than the national average.
- A good range of service uses including banks/other financial services, estate agents/valuers and laundrettes/dry cleaners.
- Rates most favourably in terms of environmental factors scoring highest in the household survey responses out of the six main centres.
- Many small and interesting independent traders.
- Lowest crime rate of the six town centres.

Weaknesses

- Relatively low levels of public transport accessibility when compared with most other centres.
- Low levels of customer satisfaction retailing to car parking provision.
- High levels of traffic through the centre.
- Relatively high proportion of charity shops.

West Green Road/Seven Sisters District Centre

West Green Road/Seven Sisters is in the south east of the Borough and is identified as a 'District Centre' in The London Plan. The town centre is focused on West Green Road starting at the junction with Kirktown Road. The boundary continues south of the junction between West Green Road and High Road (A10) on the western side of the road. A small, isolated section of the centre is located north of the junction with the A503 where a large Tesco superstore is located. There are numerous additional shops and services continuing north of the centre boundary up High Road (A10). The centre is directly south of Bruce Grove/Tottenham High Road. The centre served by Seven Sisters underground station located south of West Green Road and the railway line crosses north-south over West Green Road. The centre is predominately bound by residential areas. The main primary shopping area in West Green Road/Seven Sisters town centre is the eastern end of West Green Road and south down High Road. There is a small area of secondary frontage at the western end of West Green Road within the designated boundary. There is a large area designated as primary or secondary frontage, but there were several vacant units in this area.



West Green Road/Seven Sisters' key roles include:

- convenience shopping – Tesco Superstore suitable for main and bulk food shopping, supported by bakers (x4), butchers (x5), delicatessen (x7), fishmongers (x4), greengrocers (x2), newsagents (x2), off licences (x2) and a health food shop. There are several independent convenience stores and a Sainsburys Local. There is an indoor market at Seven Sisters (closed at the time of Lichfields' survey).
- comparison shopping – limited range of comparison offer consisting entirely of small independent retailers;
- services – a good range of restaurants/cafés, fast food/takeaways and hairdressers/beauty parlours. Also, a good range of banks/other financial services and estate agents/valuers. Travel agents and betting shops/casinos/amusement facilities also available.
- entertainment and evening economy – a good choice of restaurants/cafés and fast food/takeaways but a limited choice of pubs/bars; and
- community facilities – including six dentists, 2 doctors' surgeries, a language school, health club, social club and theatre/concert hall.

Mix of use and occupier representation

West Green Road/Seven Sisters has 297 retail and service units (source: land use survey 2020). The diversity of uses within West Green Road/Seven Sisters is set out in Table WS1, compared with the Goad Plan national average and the GLA Town Centre Data 2017 average for London.

Table WS1 - Mix of shops/service uses in West Green Road/Seven Sisters

Type	Number units	% units	GLA London average	UK average
Comparison goods retail	44	14.8	37.7	29.7
Convenience goods retail	69	23.2	12.8	9.1
Financial/professional services	28	9.4	14.7	9.3
Other non-retail services	63	21.2		16.5
Restaurants/cafés	32	10.8	14.9	9.9
Pubs/bars	5	1.7	3.8	4.8
Hot food takeaways	24	8.1	7.4	6.1
Vacant	32	10.8	8.6	14.6
Total	**297**	**100.0**	**100.0**	**100.0**

Source: West Green Road/Seven Sisters land use survey 2020 (former Class A uses only), GLA 2017 London Town Centre Data and Experian Goad Plan national averages.

West Green Road/Seven Sisters has a significantly higher proportion of convenience retail units and a significantly lower proportion of comparison units compared with the national and London averages. There were 32 vacant retail units within West Green Road/Seven Sisters at the time of the LDC's 2020 survey, a vacancy rate of 10.8%. The Council's more recent survey in September 2021 suggests only 15 vacant units in the centre. West Green Road/Seven Sisters has a limited selection of comparison shops (44) reflecting its role in the retail hierarchy, primarily as a convenience and service destination. Table WS2 provides a breakdown of comparison units by category.

Table WS2 - Mix of comparison goods shops – West Green Road/Seven Sisters

Type	Number Units	% units	UK Average
Clothing and footwear	11	25.0	21.5
Furniture, carpets and textiles	4	9.1	7.6
Books, arts, cards and stationers	1	2.3	7.7
Electrical, music and photography	9	20.5	9.1
DIY, hardware and homeware	0	0.0	6.6
China, glass and gifts	1	2.3	5.3
Cars, motorcycles and accessories	0	0.0	1.3
Chemists, drug stores and opticians	4	9.1	11.7
Variety, department and catalogue	0	0.0	1.8
Florists, nurserymen and seedsmen	0	0.0	2.2
Toys, hobby, cycle and sports	0	0.0	5.3
Jewellers	0	0.0	5.0
Charity and second-hand shops	0	0.0	9.9
Other comparison goods retailers	14	31.8	5.0
Total	**44**	**100.0**	**100.0**

Source: West Green Road/Seven Sisters land use survey 2020 and Experian Goad Plan national averages.

There are seven categories not represented and the choice in most categories is limited. The centre has a high proportion of electrical, music and photography shops. The comparison retail units within West Green Road/Seven Sisters centre are all small independent traders.

West Green Road/Seven Sisters has a good range of services (126 in total), the second highest of the six centres, as shown in Table WS4. The centre has a higher proportion of restaurant/cafés; fast food/takeaways; hairdressers/beauty parlours and launderettes/dry cleaners than the national average, but there is a lower proportion of pubs/cars and betting shops/casinos/amusement. The food/beverage uses include 16 cafés, 24 fast food/takeaways, 5 pubs/bars, a social club and a coffee shop, which provide a good mix of daytime and night-time facilities.

Table WS3 - Mix of service uses – West Green Road/Seven Sisters

Type	Number units	% units	UK Average
Restaurants/cafés	32	25.6	23.8
Fast food/takeaways	24	19.2	14.7
Pubs/bars	5	4.0	11.7
Banks/other financial services	10	8.0	8.6
Betting shops/casinos/amusement	1	0.8	3.8
Estate agents/valuers	10	8.0	7.9
Travel agents	3	2.4	1.7
Hairdressers/beauty parlours	35	28.0	26.1
Launderettes/dry cleaners	5	4.0	1.7
Sub-total	**125**	**100.0**	**100.0**
Other	1		
Total	**126**		

Source: West Green Road/Seven Sisters land use survey 2020 and Experian Goad Plan national averages.

Commercial rents

According to the VOA, Zone A retail rents vary significantly throughout the centre. Along the High Road primary frontage Zone A rents of £365 per sq.m are achieved. Zone A rents of between £425 and £450 are found along the primary frontage of West Green Road. Zone A rents in the prime pitch are the lowest of all six centres. On the edge of West Green Road Zone A rents range between £350 and £410. Overall, the centre provides a good mix of affordable premises.

Catchment area

West Green Road/Seven Sisters' local catchment (the Tottenham and Seven Sisters Neighbourhood) includes the wards of Tottenham Green, Seven Sisters and Tottenham Hale. Approximately, 44% of residents live in areas which fall into the 10% most deprived in the country, as indicated in the Local Plan Strategic Policies (2013).

The household survey results indicate that 24% of respondents across the study area had used shops and services in West Green Road/Seven Sisters in the last year, which was the lowest percentage for the six main town centres in the Borough. About 41% living in the local area (Zone 4) had visited the centre. Only 1.1% of respondents indicated that they do most of their non-food shopping in West Green Road/Seven Sisters, significantly below Wood Green (14%) and Tottenham Hale Retail Park (5%).

London Plan indicators

The London Plan (Policy SD8) sets out the network of centres and provides indicators for individual centres within the network. West Green Road/Seven Sisters designations are:

- Network classification: District centre
- Night-time classification: None
- Commercial growth potential: Low (low levels of retail, leisure or office demand)
- Residential growth potential: Medium
- Office guidelines: None
- Strategic area for regeneration: Yes

Customer views

As part of the household survey, respondents were asked if they had used shops and services in West Green Road/Seven Sisters in the last year. Of those who had used shops/services in West Green Road/Seven Sisters, respondents were asked what they like and dislike about West Green Road/Seven Sisters town centre. The main factors mentioned (5% of respondents or more) were:

- *factors liked*: nothing/none mentioned (24%); good range of shops (16%); close to home (16%); good choice of shops in general (13%); independent retailers (10%); supermarkets (9%); good quality shops (5%) and bus services (5%).
- *factors disliked*: nothing/none mentioned (35%); traffic/congestion (14%); maintenance/cleanliness (13%); shopping environment (10%); car parking (9%); unsafe/crime rate (9%) and poor choice of shops in general (5%).

The results suggest there are mixed views regarding the centre as there were high numbers of respondents mentioning nothing they liked or disliked about the centre. West Green Road/Seven Sisters rates reasonably well in terms of the choice and range of shops.

Accessibility

Public Transport Accessibility Levels (PTAL) are the highest Level 6 across the centre (Source: Haringey Strategic Policies Local Plan), the most accessible centre along with Wood Green.

The household survey results suggest West Green Road/Seven Sisters attracts customers by a variety of means of transport. Mode of travel for food shopping with the local area (Zone 4) is similar to the study area average with the highest proportions doing their main food shopping by car (43%) or walking (32%). For non-food shopping, West Green Road/Seven Sisters attracts a good mix of car, bus, train/underground and walking customers, which suggests high levels of accessibility. The survey results also indicated a higher level of satisfaction with car parking provision than dissatisfaction (9% compared with 1%). More respondents mentioned bus services as a positive rather than a negative factor (5% compared with less than 1%).

The town centre has excellent public transport accessibility and is served by numerous bus routes, over-ground and underground railway stations. The Victoria tube line provides services towards Brixton and Walthamstow Central. The over ground station is located just outside of the centre boundary, to the south of West Green Road and west of High Road and provides services north to Enfield and Chestnut (Hertfordshire) and south towards central London, terminating at London Liverpool Street. The station can also be accessed from the underground station.

West Green Road/Seven Sisters centre is served by bus routes providing good access to other parts of the Borough and central London including Waterloo, London Bridge, Shoreditch, Kings Cross, Holloway, Archway, Islington. High Road is served by route numbers 76, 149, 243, 259, 279, 318, 349, 476, N73 and

N279. West Green Road is only served by route 41 and N41 (a night route running Tottenham Hale-Trafalgar Square). The eastern part of the centre is better connected with more bus services and entrances to the over ground/underground stations.

There are three main car parks for visitors to West Green Road/Seven Sisters town centre. Westerfield Road car park (71 spaces) and Brunswick Road car park (65 spaces), located just off West Green Road, are open Monday to Saturday: 8am to 6.30pm. There are situated just outside of the designated centre boundary. The Tesco superstore also offers customer car parking. The centre is located within Seven Sisters CPZ which operates between 8am-6:30pm. Pay and display is required (£2.10 per hour) and varying restrictions apply including maximum stay and no return periods.

Environment quality

The quality of buildings within the town centre is mainly good although some shopfronts are tired in appearance. Vacant units are concentrated on the edges of the centre and several are clustered along West Green Road which detracts from the environmental quality of the centre. Immediately surrounding the centre, new residential developments, indicating recent investment in the area.

Traffic flows are heavy throughout the centre. Although there are several crossings assisting pedestrian movement within the centre, the paving along West Green Road is narrow which restricts pedestrian movement and exacerbates the dominance of traffic. Pedestrian flows is heaviest along West Green Road. Pedestrians were also concentrated around the station entrances/exits. The pavements were in good condition and were wider along High Road providing space for cycle parking and rubbish bins, but there is limited street furniture within the centre.

There was evidence of graffiti/vandalism within the centre. The centre had small amounts of litter which mainly chewing gum and cigarette butts. Overall, during daytime centre felt safe with no evidence of antisocial behaviour or begging. There is no green space within the designated centre boundary and there were limited trees. Brunswick Road open space is located south of West Green Road just outside of the boundary.

Reported crime

Recorded crime within the Tottenham Green Metropolitan Police neighbourhood was 3,916 crimes between June 2020 – July 2021, the highest of the six town centres of in the Borough. Antisocial behaviour represented 33.6% of total crimes, followed by violence and sexual offences (17.7%) and vehicle crime (9.5%).

Summary of West Green Road/Seven Sisters' Strengths and Weaknesses

Strengths

- Good selection of independent shops.
- The London Plan suggests strategic area for regeneration and medium potential for residential growth
- A good range of restaurants/cafés, fast food/takeaways and hairdressers/beauty parlours.
- Excellent public transport links i.e. rail, underground and bus.
- Accessible car parking provision with three public car parks and Tesco superstore parking all within easy walking distance.

Weaknesses

- Limited range and choice of comparison retailers compared with other competing town centres with no multiple comparison retailers.
- No night-time economy classification despite the reasonable number of restaurants/cafés.

- Traffic congestion has an adverse impact on the shopping environment.
- Highest crime rate of the six town centres.

Tottenham Hale (potential District Centre)

Tottenham Hale, located in the eastern part of the borough, is not currently a designated centre in the adopted Local Plan (Site Allocations DPD, 2017) or the London Plan. However, Tottenham Hale is identified as a potential future District Centre, with opportunities to build upon the existing offer provided at the Tottenham Hale Retail Park.

Tottenham Hale Retail Park has large retail warehouse units which wrap around a central car parking area. The main retail and service units are located adjacent to Tottenham Hale station on the south side of Ferry Lane. The station is served by underground (the Victoria line) and over-ground trains providing good links to London Liverpool Street as well as Stansted Airport. Land to the north of Ferry Lane includes station and a hotel and there is further development under construction. The main units within the retail park are bound by Ferry Lane (A503) to the north, Broad Lane to the west, the over ground railway line to the east and industrial uses south.

Redevelopment around Ashley Road includes successful employment-led mixed use development, which is integrated with education and residential uses. Ashley Road now provides a high street that links to the retail park and the proposed new district centre.

Mix of use and occupier representation

Tottenham Hale Retail Park has 21 retail and service units (source: land use survey 2020). The diversity of uses within Tottenham Hale Retail Park is set out in Table TH1, compared with the Goad Plan national average and the GLA Town Centre Data 2017 average for London.

Table TH1 - Mix of shops/service uses in Tottenham Hale

Type	Number units	% units	GLA London average	UK average
Comparison goods retail	15	71.4	37.7	29.7
Convenience goods retail	3	14.3	12.8	9.1
Financial/professional services	0	0	14.7	9.3
Other non-retail services	0	0		16.5
Restaurants/cafés	1	4.8	14.9	9.9
Pubs/bars	0	0	3.8	4.8
Hot food takeaways	2	9.5	7.4	6.1
Vacant	0	0	8.6	14.6
Total	**21**	**100**	**100.0**	**100.0**

Source: Tottenham Hale Retail Park land use survey 2020 (former Class A uses only), GLA 2017 London Town Centre Data and Experian Goad Plan national averages.

Tottenham Hale Retail Park has a significantly higher proportion of comparison retail units and a slightly higher proportion of convenience retail units compared with the national and London averages. There is a significantly lower proportion of restaurants/cafés and hot food takeaways compared with both the national and London averages. 3 categories of shops/services are not represented at the park – these are financial/professional services; other non-retail services and pubs/bars. There were no vacant retail units within Tottenham Hale Retail Park at the time of the LDC's 2020 survey.

Tottenham Hale Retail Park has a relatively a limited selection of comparison shops (15) reflecting its size and role as a retail park. All but 4 categories are represented but most categories only have one use. It has a good provision of multiple retailers. There are no local/independent retailers/traders operating from the Retail Park. The multiple comparison retailers include:

Table TH3 – Tottenham Hale Retail Park's comparison multiples

Argos	Boots the Chemist	B&Q	Card Factory
Curry's PC World	EE	Halfords	JD Sports
Next	Carphone Warehouse	TK Maxx	Wilko

Source: LDC's Tottenham Hale Retail Park Land Use Survey 2020

Table TH2- Mix of comparison goods shops – Tottenham Hale Retail Park

Type	Number Units	% units	UK Average
Clothing and footwear	2	13.3	21.5
Furniture, carpets and textiles	1	6.7	7.6
Books, arts, cards and stationers	1	6.7	7.7
Electrical, music and photography	5	33.3	9.1
DIY, hardware and homeware	1	6.7	6.6
China, glass and gifts	0	0	5.3
Cars, motorcycles and accessories	1	6.7	1.3
Chemists, drug stores and opticians	1	6.7	11.7
Variety, department and catalogue	1	6.7	1.8
Florists, nurserymen and seedsmen	0	0	2.2
Toys, hobby, cycle and sports	1	6.7	5.3
Jewellers	0	0	5.0
Charity and second-hand shops	0	0	9.9
Other comparison goods retailers	1	6.7	5.0
Total	**15**	**100**	**100.0**

Source: LDC's Tottenham Hale Retail Park land use survey 2020 and Experian Goad Plan national averages.

Tottenham Hale Retail Park has a limited range of service uses (3 in total), as shown in Table TH4. There is no provision of any services, other than restaurants/cafés and fast food/takeaways. The service uses are all multiples, including a Subway, Costa and Burger King.

Table TH4 - Mix of service uses – Tottenham Hale Retail Park

Type	Number units	% units	UK Average
Restaurants/cafés	1	33.3	23.8
Fast food/takeaways	2	66.6	14.7
Pubs/bars	0	0	11.7
Banks/other financial services	0	0	8.6
Betting shops/casinos/amusement	0	0	3.8
Estate agents/valuers	0	0	7.9
Travel agents	0	0	1.7
Hairdressers/beauty parlours	0	0	26.1
Launderettes/dry cleaners	0	0	1.7
Sub-total	**3**	**100**	**100.0**
Other	0	0	
Total	**3**	**100**	

Tottenham Area Action Plan (2017)

The regeneration of Tottenham is a key priority for the Council. The Tottenham Area Action Plan 2017 identified land capable of delivering 10,000 new homes and 5,000 new jobs, which provided a basis for the development of a new district centre at Tottenham Hale. The new centre was expected to be focused around the station and new employment and education opportunities, with enhanced connections to the Lee Valley Park and beyond

The AAP identified two main development sites as having potential for town centre uses:

- TH3: Tottenham Hale Retail Park (4.76ha / 13,900 sq.m); and
- TH5: Station Square North (1.43ha / 7,300 sq.m).

The APP vision for the Tottenham Hale area suggests a mix of town centre uses would be provided including high end retail, leisure and healthcare facilities. High quality public realm improvement are also envisaged.

Appendix 6 **Local centres analysis**

Local Needs Index (LNI)

The existing provision of local shopping destinations within the Borough offers a balanced distribution of facilities serving local communities. These facilities complement the six main town and district centres and have an important role in serving the day-to-day needs in their local areas. In addition to the audit of the six main centres, a local needs index for the Local Centres within the Borough has been undertaken. The local shopping destinations vary in size, from only 4 commercial units to as large as 118 commercial units. The key focus in auditing local destinations has been in assessing the "needs" of residents and to what extent each is meeting these "needs". There is no clear definition of need, but it is considered that residents could expect to find some, or most of the following shops, services and community uses within easy walking distance of their home:

- food or convenience store suitable for top-up shopping;
- bank;
- post office;
- newsagent;
- off licence;
- chemist;
- takeaway, café or restaurant;
- public house;
- bookmakers;
- laundrette/dry cleaners;
- hairdressers/beauty salon/barber;
- florist;
- estate agents;
- community hall;
- doctor's surgery; and
- library.

Each local destination has been allocated a score out of 16, based on the number of categories of shops and services listed above (one point per category represented in the centre). The local needs index is set out in the two tables overleaf. It is considered that the local needs index provides a useful indicator of whether a local centre or important local parade is meeting some or all the needs of residents. The local needs index is not a precise measure of whether a local shopping centre is meeting the needs of residents, as there are many other factors to consider:

- the relative size of a local centre/parade will dictate the range of shops and services offered;
- the proximity of other town centres, local centres and 'standalone' shops means that local need may be met at an alternative location within walking distance and local needs are therefore still being met;
- the quality of the shopping centre or parade, in terms of its environment, type and range of retailers will affect how it is perceived and used by local residents; and
- the relative accessibility of each centre will be an important factor in how local people use the shops and services e.g. a major traffic route, which is difficult for pedestrians to cross, may influence shopping patterns in the area.

These scores are based on the representation of key retail/service provision within the centre.

Local Needs Assessment

Destination name	Food/con	Bank	Post off.	Newsag.	Off lic.	Chemist	T/A, café	Pub	Bookm.	Laund/DC	Hairdr.	Florist	Est. agent	Com. hall	Dr surg.	Library
Wood Green	■	■	■	■	■	■	■	■	■	■	■		■		■	■
Bruce Grove/Tottenham HR	■	■	■	■	■	■	■	■	■	■	■	■	■		■	
Crouch End	■	■	■	■	■	■	■	■	■	■	■	■	■		■	
Green Lanes	■	■	■	■	■	■	■	■	■	■	■		■		■	
Muswell Hill	■	■	■	■	■	■	■	■	■	■	■		■			■
West Green R/Seven Sisters	■		■	■	■	■	■	■	■	■	■		■	■	■	
Tottenham Hale	■					■	■									
Alexandra Park Road	■			■		■	■	■			■		■			
Archway Road	■		■	■	■	■	■	■	■	■	■	■	■			
Aylmer Parade	■						■			■	■		■			
Bounds Green	■		■	■		■	■				■		■			
Broad Lane	■		■		■	■	■		■	■	■		■			
Commerce Road	■			■		■	■			■	■					
Cranley Parade					■		■									
Craven Park Road	■						■									
Crescent Road	■			■			■	■		■	■		■			
Ferme Park Road	■						■	■		■	■		■			
Great Cambridge Road	■		■	■		■	■			■	■	■				
Green Lanes	■						■				■		■			
Hermitage Road	■						■									
Highgate High Street	■			■		■	■				■		■			
Hornsey High Street	■		■	■		■	■	■	■	■	■		■			
Lordship Lane East	■			■		■	■									
Lordship Lane Roundway	■					■	■	■		■	■	■	■		■	
Lordship Lane West	■			■			■				■		■			
Lordship Lane Central	■			■			■				■		■			
Midhurst Parade	■										■					
Myddleton Road	■						■	■	■	■	■	■	■			
Park Lane	■			■		■	■	■		■	■			■	■	
Park Road/Priory Road	■			■		■	■	■		■	■	■				
Philip Lane East	■				■	■	■			■	■					
Philip Lane West	■				■		■	■		■	■	■				
Quernmore Road	■						■			■						
Seven Sisters Road	■		■			■	■			■	■					
Stroud Green Road North	■					■					■					
Stroud Green Road South	■						■				■		■			
Tottenham Lane, N8 (East)	■					■	■				■		■			
Tottenham Lane, N8 (West)	■						■			■			■			
Tottenham High Rd North	■		■	■		■	■	■	■	■	■		■		■	
Turnpike Lane	■		■		■	■	■	■	■	■	■		■			
Westbury Avenue	■			■		■	■	■		■	■		■			
West Green Road Central	■					■	■	■	■	■	■				■	
West Green Road West	■			■			■		■	■	■		■			
Weston Park, N8	■										■					
Wood Green High Rd North	■		■			■	■			■			■			

Local Needs Summary

Destination name	Status	Total Units	Local Needs Index	Number convenience shops	Number vacant units
Wood Green	Metropol.	367	13	49	24
Bruce Grove/Tottenham High Rd	District	174	14	33	21
Crouch End	District	235	14	25	25
Green Lanes	District	167	13	25	18
Muswell Hill	District	193	13	21	11
West Green Road/Seven Sisters	District	297	13	69	32
Tottenham Hale	Potential DC	22	3	3	0
Alexandra Park Road	Local	28	7	5	4
Archway Road	Local	118	12	10	16
Aylmer Parade	Local	23	5	3	4
Bounds Green	Local	25	7	6	0
Broad Lane	Local	34	9	4	7
Commerce Road	Local	12	6	3	0
Cranley Parade	Local	7	2	1	1
Craven Park Road	Local	4	2	2	0
Crescent Road	Local	25	7	3	3
Ferme Park Road	Local	12	6	1	0
Great Cambridge Road	Local	29	8	5	4
Green Lanes	Local	10	4	2	0
Hermitage Road	Local	5	2	2	2
Highgate High Street	Local	33	6	4	3
Hornsey High Street	Local	81	10	7	10
Lordship Lane East	Local	11	4	4	1
Lordship Lane Roundway	Local	92	9	20	12
Lordship Lane West	Local	29	5	7	3
Lordship Lane Central	Local	13	5	3	3
Midhurst Parade	Local	6	2	2	1
Myddleton Road	Local	64	8	3	15
Park Lane	Local	22	9	3	3
Park Road/Priory Road	Local	30	8	3	3
Philip Lane East	Local	20	6	1	2
Philip Lane West	Local	28	7	5	0
Quernmore Road	Local	10	3	1	3
Seven Sisters Road	Local	35	6	4	7
Stroud Green Road North	Local	15	3	3	1
Stroud Green Road South	Local	16	4	1	3
Tottenham Lane, N8 (East)	Local	34	5	3	6
Tottenham Lane, N8 (West)	Local	17	4	2	0
Tottenham High Rd North	Local	83	11	13	4
Turnpike Lane	Local	88	10	12	12
Westbury Avenue	Local	20	8	3	3
West Green Road Central	Local	36	8	5	2
West Green Road West	Local	58	7	6	9
Weston Park, N8	Local	11	2	3	0
Wood Green High Rd North	Local	13	6	4	1

Source: LDC's land use survey 2020 and Lichfield survey June 2021

There are a wide range of scores across the centres. All centres (except from Cranley Parade) have a least one convenience goods shop/store, catering for top-up food and grocery shopping needs. Other facilities available within most centres include hot food takeaways/cafés and hairdressers/barber. Chemists, launderettes/ dry cleaners and estate agents are available in most local centres.

Libraries and banks/building societies are now only available within the six main centres. Nationally, banks/building have rationalised their portfolios by closing branches in smaller centres. Local authorities have also rationalised the number of libraries. The number of post offices has also reduced significantly. Less than one in five local centres now have a post office. Other facilities that are available in the minority of local centres include: off licences, bookmakers, florists, community halls and doctors' surgeries.

Overall, the six main centres and larger local centres have the highest scores (12 or more on the local needs index). In addition to this it is important to consider the ability of these centres in meeting top-up shopping needs and the number of convenience stores with the ability to provide local top-up shopping (e.g. a grocer, local corner shop or small supermarket) in the centre is also considered.

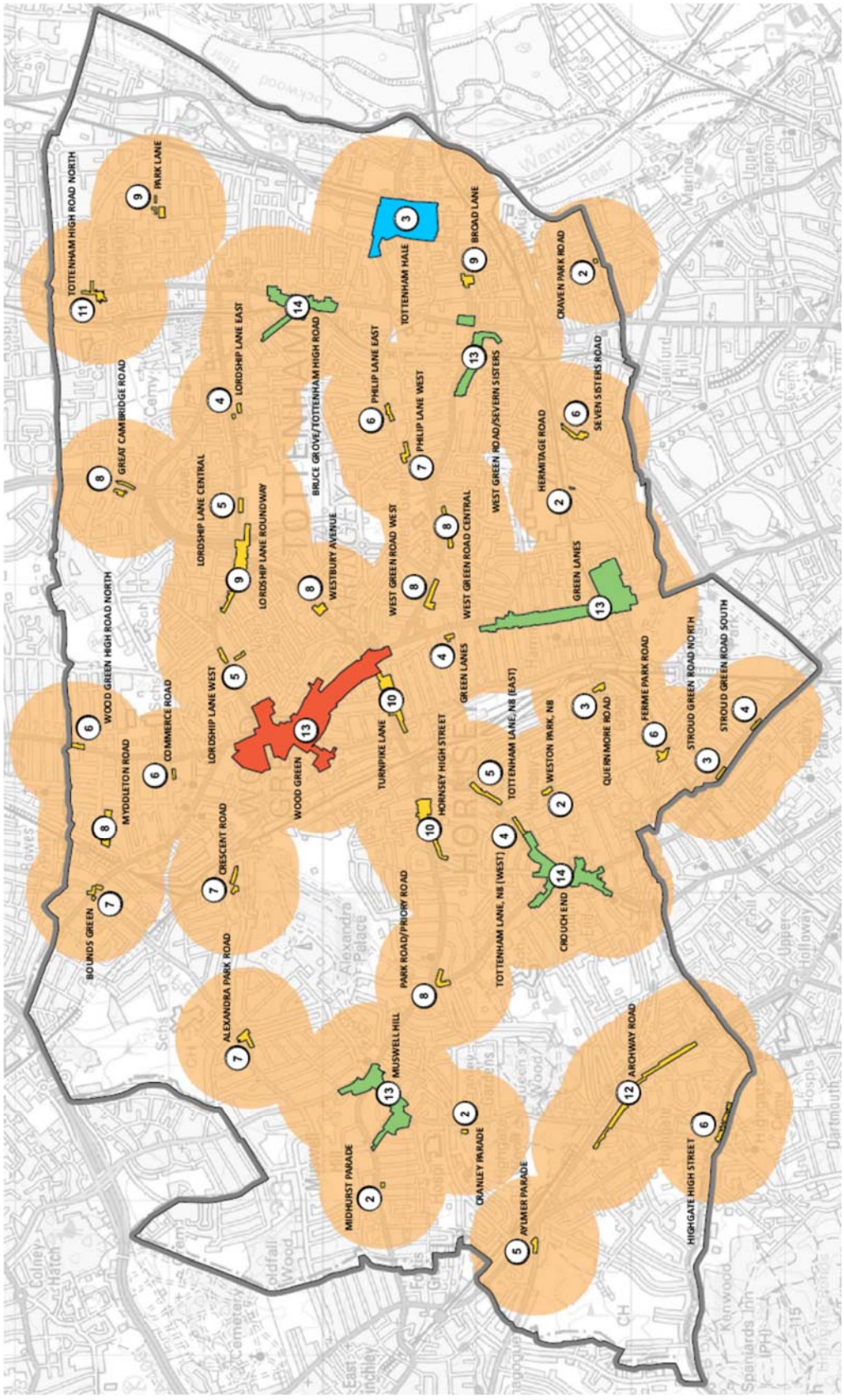
The majority of Local Centres are meeting most local needs. As indicated, most centres have at least one convenience store, takeaway/café and a hairdresser. The local needs index suggests that 23 of 38 Local Centres are meeting at least six of the identified local needs. All Local Centres were identified as having at least one convenience store for top-up shopping, but 12 Local Centres provide less than 5 of the essential shops and services. Some of these centres have extremely limited facilities with a Local Needs Index of only 2. These centres may be under threat if shop/service closures occur in the future.

The analysis of designated local centres indicates that most designated local centres in the Borough are reasonably large (with at least 10 outlets). Arguably small parades with less than 10 outlets could be downgraded to neighbourhood parade or non-designated frontages, depending on the availability of essential shops/services, the number of vacant units and their importance in serving a local area with limited alternative provision. There are only three local centres with less than 10 outlets and only 2 essential shops/services are:

- Craven Park Road (4 units)
- Hermitage Road (5 units)
- Midhurst Parade (6 units)

The main and local centres and their respective scores are plotted on a plan overleaf. A 400 metres radius from each centre is also shown, which is considered a reasonable walking distance within the London Plan.

This plan demonstrates most households within the Borough have at least one designated centre or parade within easy walking distance (400 metres). There are only a few built up areas without provision within 400 metres. This network if centres should continue to be protected to ensure appropriate accessibility to important facilities for all sections of the community and to ensure sustainable shopping patterns.


TOTTENHAM HIGH ROAD NORTH
PARK LANE
GREAT CAMBRIDGE ROAD
LORDSHIP LANE EAST
LORDSHIP LANE CENTRAL
LORDSHIP LANE ROUNDWAY
BRUCE GROVE/TOTTENHAM HIGH ROAD
PHILIP LANE EAST
TOTTENHAM HALE
BROAD LANE
CRAVEN PARK ROAD
PHILIP LANE WEST
WEST GREEN ROAD/SEVERN SISTERS
HERMITAGE ROAD
SEVEN SISTERS ROAD
WESTBURY AVENUE
WEST GREEN ROAD WEST
WEST GREEN ROAD CENTRAL
GREEN LANES
WOOD GREEN HIGH ROAD NORTH
COMMERCE ROAD
LORDSHIP LANE WEST
TURNPIKE LANE
HORNSEY HIGH STREET
TOTTENHAM LANE, N8 (EAST)
WESTON PARK, N8
QUEENSMORE ROAD
FERME PARK ROAD
STROUD GREEN ROAD NORTH
STROUD GREEN ROAD SOUTH
MYDDLETON ROAD
CRESCENT ROAD
WOOD GREEN
BOUNDS GREEN
ALEXANDRA PARK ROAD
PARK ROAD/PRIORY ROAD
TOTTENHAM LANE, N8 (WEST)
CROUCH END
MUSWELL HILL
ARCHWAY ROAD
MIDHURST PARADE
CRANLEY PARADE
AYLMER PARADE
HIGHGATE HIGH STREET

Key

Haringey Local Authority Boundary

Centre Status

Metropolitan

District

Potential District

Local

Local Needs Index

(#) Local Needs Index Score

400m radius from centre boundary

Birmingham
0121 713 1530
birmingham@lichfields.uk

Bristol
0117 403 1980
bristol@lichfields.uk

Cardiff
029 2043 5880
cardiff@lichfields.uk

Edinburgh
0131 285 0670
edinburgh@lichfields.uk

Leeds
0113 397 1397
leeds@lichfields.uk

London
020 7837 4477
london@lichfields.uk

Manchester
0161 837 6130
manchester@lichfields.uk

Newcastle
0191 261 5685
newcastle@lichfields.uk

Thames Valley
0118 334 1920
thamesvalley@lichfields.uk