Nathaniel Lichfield & Partners
Planning. Design. Economics.

Retail and Town Centres Study 2013

Main Report

London Borough of Haringey

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Registered Office:
14 Regent's Wharf
All Saints Street
London N1 9RL

Contents

Figures

Tables

Glossary

Class A1

Commercial units classed as retail or shop uses within the Use Classes Order.

Class A1 Services

Non-retail uses classed as A1 within the Use Classes Order, such as hairdressers, travel agents and dry cleaners.

Class A2

Commercial units classed as financial or professional services, for example banks and building societies, within the Use Classes Order.

Class A3/A4/A5

Commercial units classed as food or drink outlets, for example pubs, restaurants and takeaways, within the Use Classes Order.

Convenience Goods

Consumer goods purchased on a regular basis, including food and groceries and cleaning materials.

Comparison Goods

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

Experian

A data consultancy who are widely used for retail planning information.

Goad Plans

Town centre plans prepared by Experian, which a based on occupier surveys of over 1,200 town centres across the country.

Gross floorspace

Total external floorspace including exterior walls.

Higher order comparison goods

Durable goods which tend to be high value, bought on an occasional basis and/or where customers are most likely to shop around and compare products in different shops e.g. adult fashion items, high value electrical goods, jewellery, furniture etc. Customers are usually prepared to tend to travel further to purchase these items.

Lower order comparison goods

Durable goods which tend to be lower value, bought on a regular basis and/or where customers are less likely to shop around e.g. small household goods, books, pharmaceutical and toiletries. Customers are less likely to travel long distances to purchase these items.

Market share/Penetration rate

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

Multiple traders

National or regional *'chain store'* retailers.

Net floorspace

Retail floorspace devoted to the sale of goods, excluding storage space.

Zone A Rent

The annual rental charge per square foot for the first 20 foot depth of a shop unit, which is the most suitable measure for standardising and comparing rental levels.

1.0 Introduction

Study Objectives

1.1 Nathaniel Lichfield & Partners (NLP) was commissioned by the London Borough of Haringey to prepare a retail and town centres study; including an assessment of the Metropolitan and District Centres within the authority area, in line with the requirements of the National Planning Policy Framework (NPPF) (March 2012).

1.2 NLP was previously commissioned by the London Borough of Haringey to prepare a Retail Study in 2008 and subsequently prepared a retail audit/health check of Tottenham High Road (including the two district centres at Tottenham High Road/Bruce Grove and Seven Sisters/West Green Road) in 2011.

1.3 This study focuses on the following centres:

1. Wood Green Metropolitan Centre;
2. Crouch End District Centre;
3. Muswell Hill District Centre;
4. Green Lanes District Centre; and
5. Retail parks and local centres in the borough

1.4 The Council is developing an Investment Framework and Regeneration Strategy for Tottenham in partnership with the GLA and has commissioned ARUP to take forward this work. As a result, this Study does not focus on Tottenham apart from the quantitative analysis which considers retail capacity across all the centres within the borough.

1.5 A key objective of this study is to provide a robust and credible evidence base to inform the Council’s work on emerging policy documents, based on changes since the 2008 Study, including the publication of the London Plan in 2011 and National Planning Policy Framework (NPPF) in 2012.

1.6 The key objectives of the study will be to:

- assess changes in circumstances and shopping patterns since the previous study was undertaken;
- assess the future need and capacity for retail floorspace distributed by town centre for the period up to 2031;
- review the existing retail hierarchy and identify any deficiencies in the network including, where appropriate, the scope for extending/reducing the primary shopping area and/or town centre;
- provide advice as to whether an Article 4 Direction should be employed to control the clustering of betting shops, payday loan shops and hot food takeaways; and

- provide advice on policies to be included in development plan documents to address future needs, including advice on an appropriate floorspace level for local impact assessments.

2.0 Planning Policy Context

National Planning Policy Framework (NPPF)

2.1 The NPPF sets out the Government's planning policy for England superseding the majority of earlier National Planning Policy Guidance and Statements (including PPS4). The Practice Guidance relating to PPS4 has not been cancelled by publication of the NPPF and retains its role as guidance in so far as it does not conflict with the NPPF.

2.2 The NPPF seeks to provide a "*framework within which local people and their accountable councils can produce their own distinctive local and neighbourhood plans, which reflect the needs and priorities of their communities.*" (para 1)

2.3 The NPPF emphasises (para 6) that the purpose of the planning system is to contribute to the achievement of sustainable development. It notes (para 7) that "*there are three dimensions to sustainable development: economic, social and environmental.*"

2.4 The NPPF states (para 12) that it does not change the statutory status of the development plan as the starting point for decision making and that "*it is highly desirable that local planning authorities should have an up-to-date plan in place.*"

2.5 Within this context (para 14), the *"presumption in favour of sustainable development… should be seen as a golden thread running through both plan-making and decision-taking."*

2.6 For plan-making this means that:

- Local planning authorities should positively seek opportunities to meet the development needs of their area;
- Local Plans should meet objectively assessed needs, with sufficient flexibility to adapt to rapid change, unless:
    - Any adverse impacts of doing so would significantly and demonstrably outweigh the benefits, when assessed against the policies in this Framework taken as a whole; or
    - Specific policies in this Framework indicate development should be restricted.

2.7 For decision-taking this means:

- Approving development proposals that accord with the development plan without delay; and
- Where the development plan is absent, silent or relevant policies are out-of-date, granting permission unless:
    - Any adverse impacts of doing so would significantly and demonstrably outweigh the benefits, when assessed against the policies in this Framework taken as whole; or

- Specific policies in this Framework indicate development should be restricted.

NPPF Retail Planning Policy

2.8 Consistent with the now superseded PPS4, the NPPF emphasises that (para 23) "*Planning policies should be positive, promote competitive town centre environments and set out policies for the management and growth of centres over the plan period."*

2.9 The NPPF continues that in drawing up Local plans, local planning authorities should:

- Recognise town centres as the heart of their communities and pursue policies to support their viability and vitality;
- Define the extent of town centres and primary shopping areas, based on a clear definition of primary and secondary frontages in designated centres, and set policies that make clear which uses will be permitted in such locations;
- Promote competitive town centres that provide customer choice and a diverse retail offer and which reflect the individuality of town centres;
- Retain and enhance existing markets and, where appropriate, re-introduce or create new ones, ensuring that markets remain attractive and competitive;
- Allocate a range of suitable sites to meet the scale and type of retail, leisure, commercial, office, tourism, cultural, community and residential development needed in town centres. It is important that needs for retail, leisure, office and other main town centre uses are met in full and are not compromised by limited site availability. Local planning authorities should therefore undertake an assessment of the need to expand town centres to ensure a sufficient supply of suitable sites;
- Allocate appropriate edge of centre sites for main town centres uses that are well connected to the town centre where suitable and viable town centre sites are not available. If sufficient edge of centre sites cannot be identified, set policies for meeting the identified needs in other accessible locations that are well connected to the town centre;
- Set policies for the consideration of proposals for main town centre uses which cannot be accommodated in or adjacent to town centres;

2.10 At the subsequent decision-taking stage (para 26) when assessing applications for retail, leisure and office 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 floorspace threshold (if there is no locally set threshold, the default threshold is 2,500 sqm)."*

2.11 Such an assessment should both:

- apply a sequential test; and
- require an assessment of:
  - The impact of the proposal on existing, committed and planned public and private investment in a centre or centres in the catchment area of the proposal; and
  - The impact of the proposal on town centre vitality and viability, including local consumer choice and trade in the town centre and wider area, up to five years from the time the application is made. For major schemes where the full impact will not be realised in five years, the impact should also be assessed up to ten years from the time the application is made.

2.12 Furthermore (para 27) "*Where an application fails to satisfy the sequential test or is likely to have significant adverse impact on one or more of the above factors, it should be refused.*"

2.13 In setting out guidance on preparing Local Plans the NPPF states (para 151) that "*Local Plans must be prepared with the objective of contributing to the achievement of sustainable development.*"

Using a Proportionate Evidence Base

2.14 In preparing Local Plans, *"each local planning authority should ensure that the Local Plan is based on adequate up-to-date and relevant evidence about the economic, social and environmental characteristics and prospects of the area"* and *"take full account of relevant market and economic signals."* (para 158)

Development Plan Policy

2.15 The development plan for LB Haringey comprises The London Plan (July 2011), the Local Plan Strategic Policies (March 2013) and 'saved' policies within the Haringey Unitary Development Plan (July 2006).

The London Plan

2.16 Policy 2.7 identifies the London Borough of Haringey as an outer London borough. Boroughs in outer London, *"…should address constraints and opportunities in the economic growth of outer London so that it can rise above its long term economic trends."* To do this the outer London boroughs should:

a Identify, develop and enhance capacity to support both viable local activities and those with a wider sub-regional offer.

b Identify and bring forward capacity in and around town centres with good public transport accessibility to accommodate leisure, retail and civic needs.

2.17 Policy 2.8 seeks to enhance accessibility in outer London boroughs by, *"…improving links to and between town centres and other key locations by different modes…"*

2.18 Policy 2.15 relates to town centres and states that the Mayor, boroughs and other stakeholders should coordinate the development of London's network of town centres. Town centres should be developed to provide:

a The main foci beyond the CAZ for commercial development and intensification

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

c The foci for most Londoners' sense of place and local identity in the capital.

2.19 *"Changes to the network, including designation of new centres or extension of existing ones where appropriate, should be coordinated strategically with relevant planning authorities…Identified deficiencies in the network of town centres can be addressed by promoting centres to function at a higher level in the hierarchy or by designating new centres where necessary…"*

2.20 In preparing LDFs boroughs should:

a Identify town centre boundaries, primary and secondary shopping areas in LDF proposals maps and set policies for each type of area

b In coordination with neighbouring authorities, identify other, smaller centres

c Manage declining centres [proactively, considering the scope for consolidation and strengthening of centres

d Support and encourage town centre management to promote safety, security and environmental quality

e Promote the provision of Shopmobility schemes to improve access to goods and services for older and disabled Londoners.

2.21 Annex 2 of the London Plan sets out town centre classifications within London's town centre network. Wood Green is classified as a Metropolitan Centre and Bruce Grove, Crouch End, Green Lanes, Muswell Hill and West Green Road/Seven Sisters are all classified as District Centres (Table A2.1). In Table A2.2 Tottenham Hale is identified as a 'potential future change to the town centre network over the Plan period'. It is proposed that Tottenham Hale could be classified as a District Centre subject to, *"…capacity analysis, impact assessment, land use and accessibility, planning approvals, town centre health checks and full implementation."*

2.22 Policy 2.16 states, *"The Mayor will, and boroughs and other stakeholders should, identify, develop and promote strategic development centres in outer London with one or more strategic economic functions."*

2.23 Policy 4.7 states *"the Mayor supports a strong, partnership approach to assessing need and bringing forward capacity for retail, commercial, culture and leisure development in town centres."*

2.24 *"In preparing LDF's, boroughs should:*

a *Identify future levels of retail and other commercial floorspace need in light of integrated strategic and local assessments*

b *Undertake regular town centre health checks to inform strategic and local policy and implementation*

c *Take a proactive partnership approach to identify capacity and bring forward development within or, where appropriate, on the edge of town centres*

d *Firmly resist inappropriate out of centre development*

e *Manage existing out of centre retail and leisure development in line with the sequential approach, seeking to reduce car dependency, improve public transport, cycling and walking access and promote more sustainable forms of development."*

2.25 Policy 4.8 states that the Mayor will support, *"…a successful, competitive and diverse retail sector which promotes sustainable access to the goods and services that Londoners need…"*

2.26 Local Planning Authorities are required to take a proactive approach to planning for retailing:

a Bring forward capacity for additional comparison goods retailing, particularly in Metropolitan and major centres

b Support convenience retail, particularly in District, Neighbourhood and local centres

c Provide a policy framework for maintaining and enhancing local shopping facilities. Develop policies to prevent the loss of retail facilities that provide essential convenience and specialist shopping

d Identify areas under-served in local convenience shopping services and support additional facilities at an appropriate scale

e Support the range of London's markets to improve their management and enhance their offer to contribute to the vitality of town centres

f Support the development of e-tailing and more efficient delivery systems.

2.27 Policy 4.9 states that boroughs should develop local policies where appropriate to support the provision of small shop units suitable for small/independent retailers and service outlets to strengthen the attractiveness and competitiveness of centres.

Haringey Unitary Development Plan (July 2006)

2.28 The Haringey Unitary Development Plan (UDP) was adopted in July 2006. The relevant policies that have been saved since March 2013 are set out below.

2.29 The hierarchy of shopping centres in the borough is defined in the UDP as follows:

- **Metropolitan Centres:**

- Wood Green

- **District Centres:**
  - Muswell Hill
  - Crouch End
  - Green Lanes
  - Tottenham High Road/Bruce Grove
  - West Green Road/Seven Sisters Road
- **Local Shopping Centres:**
  - 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 Road North, N17
  - Turnpike Lane
  - Westbury Avenue, N22
  - West Green Road Central, N15
  - West Green Road West
  - Weston Park, N8
  - Wood Green High Road North,N22

2.30 Policy TCR2 refers to Out of Centre Development and states that proposals for new retail development outside the identified town and local shopping centres should demonstrate that: there is a need (no longer applicable in accord with the NPPF) and the sequential approach has been properly applied; it will not have a demonstrably harmful effect on the vitality and viability of ant nearby centres; amenity and environment of occupiers and nearby properties are not adversely affected; it is, or can be made, readily accessible by a choice of means of transport, including by bike or foot; or the proposal complies with the adopted Planning Framework. The Policy also indicates that it may be necessary to impose conditions on the range of goods and services and the subdivision or merger of a unit to ensure proposals to not adversely affect nearby centres.

2.31 In terms of Protection of Shops in Town Centres, Policy TCR3 states:

"Proposals to change the use from existing Class A1 retail will be allowed provided that:

a *where appropriate as a general guideline, the resulting proportion of A1 units does not fall below:*

- *65% in the primary frontage*
- *50% in the secondary frontage*

b *the change of use does not result in a significant break, normally 3 frontages, in the continuity of retail frontage; and*

c *individually or cumulatively the proposed use does not have an adverse effect on the vitality, viability or predominantly retail function of the centre."*

2.32 With regards to the protection of Local Shops, Policy TCR4 states that proposals to change the use from existing Class A1 will be allowed as long as it can be demonstrated that there is no realistic prospect of the unit being used for A1 purposes in the foreseeable future; the proposal does not have an adverse effect on the vitality and viability or where appropriate the predominantly retail function; and the change of use does not result in a significant break in the continuity of retail frontage.

2.33 In terms of Restaurants, Cafes, A4 Drinking Establishments and A5 Hot Food Takeaways (Policy TCR5) the Council when assessing proposals will take into account the effectiveness of measures to mitigate litter, undue smell, odours and noise from the premises; the hours of opening, operation and delivery and the proportion of existing A3, A4 and A5 uses within the main town centres.

Local Development Framework

2.34 **Haringey's Local Plan: Strategic Policies Document** was adopted on 18 March 2013 and together with the 'saved' UDP policies is the development plan for the borough. The relevant policies are set out below:

2.35 Policy SP10 states, *"the Council will promote the distribution of retail growth to meet the required additional 13,800 sqm gross comparison goods floorspace ad an additional 10,194 sqm net convenience goods floorspace by 2016. The majority of the retail growth is to be met in Wood Green Metropolitan Centre and the five District Centres."*

2.36 Wood Green is to be the 'principal focus of growth' to create a thriving and vibrant centre for North London. Development which creates a diverse evening and night-time economy will be supported in Wood Green provided measures are in place to address community safety, policing, litter and the potential for noise disturbance.

2.37 The five District Centres (Bruce Grove/Tottenham High Road, Crouch End, Green Lanes, Muswell Hill and West Green Road/Seven Sisters) will continue to be supported and strengthened as important shopping and service centres 'to meet people's day-to-day needs'. *"The Council will take a proactive partnership approach to reinvigorating these town centres, widening their role and offer, developing their identities, improving the public realm and accessibility to them."*

2.38 The local shopping centres *"…will continue to be supported in providing core local shopping facilities and services…for their respective local communities…"*

2.39 *"Given the existing scale, role and function and mixed use development which is currently taking place at Tottenham Hale there may be potential to designate Tottenham Hale Urban Centre as a new District Centre."*

2.40 The supporting text to Policy SP10 recognises that the Metropolitan Town Centre and District Town Centres, *"…are influenced by major shopping destinations in north and central London and compete with a number of centres in neighbouring boroughs including Brent Cross, Walthamstow and Edmonton Green in Enfield."* (para 5.3.5).

2.41 Haringey is currently preparing a **Development Management Document** and **Site Allocations DPD**. An Issues and options version of the DM Policies was published for consultation in March 2013 and this consultation includes a Call for Sites for the emerging Site Allocations Document.

Additional Guidance

2.42 The **Wood Green Town Centre SPD (October 2008)** states that the vision for Wood Green is to create a *"…vibrant, dynamic, cosmopolitan and commercially successful Metropolitan town centre…"* The SPD identifies 5 opportunity zones:

1. Town Centre North – opportunities for mixed use redevelopment including Green Ridings House. Potential to improve the access arrangements to the bus depot and the quality of the pedestrian environment throughout.
2. The Broadway – Potential reconfiguration of Morrisons and improvements to junction of High Road and Lordship Lane. Future opportunities to reconfigure the podium block of River Park House to provide an active frontage.
3. Shopping City – Future opportunities to redevelop the Library complex and Shopping City, to improve the street environment and linkages.
4. High Road – Opportunities to redevelop the BHS store and improve the appearance of the units along the southern section of the High Road. Mixed use development at Lymington Avenue.
5. Turnpike Lane – improvements to the maintenance and provision of facilities at Ducketts Common and to the public realm and shop frontages in Turnpike Lane. Opportunity to create a new public area in front of Turnpike Lane tube station.

3.0 The Shopping Hierarchy and Catchment Area

Shopping Centres in Haringey and the Surrounding Area

3.1 Wood Green, Muswell Hill, Crouch End, Tottenham High Road/Bruce Grove, Green Lanes, West Green Road/Seven Sisters Road are the six main shopping centres within the London Borough of Haringey. These centres are supported by Tottenham Hale Retail Park. The town centres are influenced by major shopping destinations in Central and North London and compete with a number of centres in neighbouring boroughs including Brent Cross, Walthamstow, Ilford, Romford and Oxford Street. Residents in the borough have good access to a number of centres by road, public transport and on foot.

3.2 Management Horizons Europe (MHE) Retail UK Shopping Index 2008 provides an index of retail centres on the basis of a weighted score for multiple retailers represented in each centre. MHE's rank for centres in the borough and other shopping centres in the sub-region are shown in Table 4.1.

3.3 Wood Green is the highest ranked centre in the borough (128^{th}) followed by Muswell Hill (581^{st}), Tottenham (641^{st}) and Crouch End ($1,247^{th}$). There are several centres surrounding the borough that are ranked above Wood Green including Oxford Street, Romford, Ilford and Brent Cross. Walthamstow, Enfield and Islington are ranked slightly below Wood Green. Muswell Hill is ranked below centres such as Chingford, Barnet and Dalston but above Lower Edmonton. Tottenham is ranked below Palmers Green but above Southgate and Whetstone. Crouch End is ranked above Tottenham Hale Retail Park and Whetstone and below Southgate. Major expansion proposals at Brent Cross and Stratford which have taken place will alter the MHE rankings in the future and may mean that Wood Green slips in the rankings.

3.4 Green Lanes and West Green Road/Seven Sisters Road are not included within the MHE Index as they are relatively small with limited or no multiple retailer provision.

Table 3.1 Retail UK Shopping Index 2008

Venue	2008 Score	2008 Rank
Oxford Street	625	1
Romford	267	47
Ilford	204	103
Wood Green	**182**	**128**
Brent Cross	190	116
Walthamstow	159	168
Islington	161	163
Enfield	153	178
Stratford	103	300
Finchley	116	258
Holloway	99	322
Chingford	112	269
Barnet	77	440
Dalston	66	522
Hackney	63	544
Muswell Hill	**59**	**581**
Upper Edmonton	91	355
Leyton	64	537
Lower Edmonton	46	779
Palmers Green	39	914
Tottenham*	**54**	**641**
Southgate	37	959
Whetstone	27	1325
Crouch End	**29**	**1247**
Tottenham Hale Retail Park	**24**	**1481**
Stoke Newington	28	1290
Friern Bridge Retail Park	24	1481
Haringey	**37**	**959**
Winchmore Hill	30	1207
Finsbury Park	18	1866
London, South Tottenham*	19	1789

Source: MHE Retail UK Shopping Index 2008

** Tottenham is Bruce Grove/Tottenham High Road District Centre and South Tottenham is Seven Sisters/West Green District Centre..*

3.5 The catchment areas of the centres listed above overlap to a large extent. Residents within Haringey have a large number of shopping destinations to choose from. A notable proportion of residents travel to these destinations, particularly for higher order comparison shopping, such as clothing and footwear.

3.6 The relative performance and importance of shopping centres can be demonstrated by commercial yields and Zone A rental levels achieved for retail property. Retail yields for the established centres in the sub-region are shown in Table 4.2 and a comparison of Zone A rental levels is shown in Table 4.3.

3.7 Commercial yields are a measure of property values, which enables the values of properties of different size, location and characteristic to be compared. The level of yield broadly represents the market's evaluation of risk and return attached to the income stream of shop rents. Broadly speaking low yields indicate that a centre is considered to be attractive and, as a result, more likely to attract investment and rental growth than a centre with high yields.

3.8 Within the borough retail yield data is only available for Wood Green and Muswell Hill. Retail yields are relatively low (strong) in Wood Green, and have fallen from 7% to 5.75% since July 2004. Yields within Wood Green are higher (worse) than the West End and slightly higher than Romford and Ilford (The Exchange) but the same as Enfield and slightly lower (better) than in Finchley, Barnet and Ilford. For Muswell Hill, retail yields are slightly lower (better) than in Ilford and are slightly higher (worse) than Finchley and Barnet.

Table 3.2 Retail Yields in Haringey and Other Centres

Centre	Yield (%)								
	July 2004	Jan 2005	July 2005	Jan 2006	July 2006	Jan 2007	July 2007	Jan 2008	July 2008
London West End	5.25	5.25	5	5	5	4.5	4.25	4.25	4.25
Romford	5.5	5.5	5.5	5.5	5	5.5	6	5.5	5.5
Ilford (The Exchange)	5	5.5	5.5	5.5	5.5	5.5	5.5	5.5	5.5
Wood Green	**7**	**7**	**7**	**6.75**	**6.5**	**6.25**	**6**	**5.75**	**5.75**
Enfield	7	7	7	6.75	6.5	6.25	6	5.75	5.75
Finchley	7.5	7.5	7.5	7	7	6.5	6.25	6	6
Barnet	8	8	8	7.5	7	6.5	6.25	6	6
Ilford	6	7	7	7	6.5	6.5	6.5	6.5	6.5
Muswell Hill	**8**	**8**	**8**	**7.5**	**7.5**	**7.25**	**7**	**6.5**	**6.25**
Palmers Green	>=10	>=10	>=10	9	9	8.5	7.75	7.5	7.5
Chingford	9.5	9.5	9.5	9.5	7.5	7.5	7.5	7.5	7
Walthamstow	9	9	9	9	7.5	7.5	7.5	7.5	7

Source: Valuation Office (July 2008)

3.9 Retail rental data is also only available for Wood Green. Wood Green achieves a Zone A rent of £1,292 per sqm. The retail rents steadily increased from 2003 to a peak of £1,561 in 2008, however they then fell to £1,292 in 2009. Retail rents in Wood Green are slightly lower than in Enfield and Ilford and significantly lower than rents in Romford, Brent Cross and Oxford Street. Retail rents are higher in Wood Green than in Walthamstow and significantly higher than in Barnet and Waltham Cross.

Table 3.3 Retail Rents in Haringey and Other Centres

Centre	Annual Zone A Retail Rents £ per Sq M							
	2003	2004	2005	2006	2007	2008	2009	2010
London, Oxford St	4,090	4,037	4,037	4,198	4,198	4,306	4,306	4,306
Brent Cross	4,467	4,467	4,575	4,575	4,736	4,844	4,844	4,844
Romford	1,938	2,045	2,153	2,207	2,260	2,260	1,938	1,938
Ilford	1,615	1,722	1,722	1,722	1,830	1,830	1,615	1,399
Enfield	1,292	1,507	1,561	1,615	1,615	1,615	1,399	1,399
Wood Green	**1,292**	**1,292**	**1,399**	**1,399**	**1,453**	**1,561**	**1,292**	**1,292**
Walthamstow	969	1,023	1,023	1,023	1,076	1,076	861	861
Barnet	646	646	646	807	807	807	700	700
Waltham Cross	538	592	592	592	646	646	538	538

Source: Colliers CRE In-Town Retail Rents 2010

3.10 Retail Yields in Wood Green are relatively low (good) and in line with surrounding similar sized centres i.e. Enfield. Retail Rents in Wood Green are relatively high but are lower than similar sized centres. As a Metropolitan Centre, Wood Green should be trying to achieve higher Zone A retail rents, however, it is clear that rents have steadily increased in the past. The current economic climate has affected retail rents in most similar sized centres to Wood Green.

Socio-Economic Characteristics within Haringey

3.11 Shopping needs may vary considerably, often related to socio-economic characteristics. For example, residents without access to a car within areas poorly served by public transport or those on low incomes will have different needs to those who are mobile by car or who enjoy higher incomes. Lower income groups without access to a car may be less able to travel to shopping facilities and may also be socially excluded from high priced shops. Therefore, the availability of local shopping facilities near to residential areas or within a short journey by public transport, or discount/value retail facilities may be important for these groups. The socio-economic characteristics (based on 2001 and 2011 census data) of the London Borough of Haringey have been examined and compared with the Inner London and national averages.

3.12 Car ownership in the borough (53.4% of households) is slightly higher than the Inner London average (49.4%) significantly lower than the England & Wales average (73.2%), as shown in Table 3.2. This lower car ownership in respect of the England/Wales average in part reflects the borough's good access to public transport. Car ownership is generally lower in major urban areas than in rural areas or small towns.

Table 3.4 Car Ownership 2001

Characteristic	% Households 2001		
	Haringey	Inner London Average	England & Wales Average
Car Ownership			
Two or more	12.2	10.1	29.4
One	41.2	39.3	43.8
None	46.6	50.6	26.8

Source: 2001 Census of Population

3.13 Haringey has a slightly lower proportion of economically active adults in employment compared with the Inner London and National averages. This is due to a slightly higher unemployment rate in the borough. The borough has a comparable proportion of students and residents looking after home/family compared to the Inner London average and higher than the national average. The proportion of retired residents is slightly higher than the Inner London average but is lower than the national average.

Table 3.5 Economic Activity 2001

Status	% People Aged 17-64		
	Haringey	Inner London Average	UK Average
Employed	56.1	57.4	59.6
Unemployed	5.8	5.6	4.4
Looking after home/family	7.2	7.1	6.4
Students	11.7	11.4	7.2
Retired	8.1	7.8	13.4
Other inactive	11.1	10.7	8.9

Source: 2001 Census of Population

3.14 The age structure in the borough varies slightly when compared with the Inner London and National averages. The borough has a lower proportion of adults aged 15 to 29 but a higher proportion of adults aged 45 to 59 compared to the Inner London Average. The proportion of adults aged 30 to 44 broadly the same as the Inner London Average and this is higher than the England & Wales average.

Table 3.6 Age Structure 2011

Age	% of Population 2011		
	Haringey	Inner London Average	England & Wales Average
Children 0-14	19.3	17.4	17.6
Adults 15 to 29	24.0	27.3	20.0
Adults 30 to 44	27.9	28.0	20.5
Adults 45 to 59	16.4	15.3	19.4
Adults 60 to 74	8.6	8.1	14.7
Adults 75 +	3.8	3.9	7.8

Source: 2011 Census of Population

3.15 Haringey's ethnic mix when compared with the rest of Inner London and the UK as a whole. The proportion of Black/Black British Caribbean and African is higher than both the Inner London and National averages. There is a lower proportion of White British in the borough when compared to both the Inner London and National average, however, the proportion of 'Other White' is significantly higher than both the Inner London and National averages.

Table 3.7 Ethnic Group 2001

Ethnicity	% of Population 2001		
	Haringey	Inner London Average	UK Average
White British	45.3	50.5	88.2
White Irish	4.3	3.4	1.2
Other White	16.0	11.8	2.5
Mixed	4.6	3.9	1.2
Asian or Asian British (Indian)	2.9	3.1	1.8
Asian or Asian British (Pakistani)	1.0	1.6	1.3
Asian or Asian British (Bangladeshi)	1.4	4.6	0.5
Other Asian	1.6	1.3	0.4
Black/Black British (Caribbean)	9.5	6.9	1.0
Black/Black British (African)	9.2	8.3	0.9
Other Black/Black British	1.4	1.3	0.2
Chinese	1.1	1.4	0.4
Other Ethnic Group	2.0	2.0	0.4

Source: 2001 Census of Population

3.16 This socio-economic analysis indicates that Haringey differs from other Inner London boroughs and the UK as a whole. The borough has lower levels of car ownership, which reflects the availability and frequency of public transport as well as low levels of income. The borough has a similar age structure to other Inner London boroughs with a relatively high proportion of adults (15 to 44 years old) and lower levels of retired people, however, the proportion of economically active is still slightly lower than the National average. There are is strong mix of ethnic minority communities in the borough.

4.0 # Household Survey Results

Survey Structure

4.1 NEMS Market Research carried out a telephone survey of 1,000 households across the LB Haringey Study Area in September 2012. The key findings of the household survey can be found in Appendix 5 and a copy of the survey results are shown in Appendix 6. The Study Area, shown in Appendix 1, was split into eight sectors or zones based on postal sector boundaries, as follows:

- Zone 1: Wood Green
- Zone 2: Muswell Hill
- Zone 3: Crouch End
- Zone 4: Fortis Green/Highgate
- Zone 5: Arnos Grove/Palmers Green
- Zone 6: Green Lanes/Stamford Hill
- Zone 7: Bruce Grove/Tottenham High Road
- Zone 8: Tottenham/White Hart Lane

4.2 The Study Area includes all parts of the London Borough of Haringey (within Zones 1, 2, 3, 6, 7 and 8), and also parts of adjacent boroughs where people are likely to shop within the borough. A list of the postcodes contained in each zone is shown in Appendix 1. The zones were chosen based on postal sector boundaries which best fit the likely primary catchment areas of the main centres in the borough.

Scope of Analysis

4.3 The number of interviews undertaken reflects the population in each zone in order to provide statistically reliable sub-samples. The main aims of the survey were to establish patterns for the following:

- Main food and top up grocery shopping;
- Non-food shopping, including:
    - clothing and footwear;
    - domestic electrical appliances;
    - other electrical goods (TV, Hi-Fi and computers);
    - furniture, soft furnishing or carpets;
    - DIY/hardware items and garden items;
    - chemist, health and beauty items; and
    - Other non-food items (eg. books, CDs, DVDs, toys and gifts).

4.4 The survey also assessed respondents views on their experience of shopping within LB Haringey, their likes and dislikes of it and factors which would make them more likely to shop in the centres within LB Haringey.

Key Messages from the Household Survey Results

4.5 Key findings of the household survey are summarised below:

- Large supermarkets are the most popular destination for main food shopping, but the preferred locations varied significantly throughout the Study Area. Approximately half of the respondents travel by car to do their main food shopping but walking and travelling by bus were also popular modes of transport.
- Approximately 78% of respondents indicated that they do small scale/top-up food shopping. Overall, the majority of this type of shopping is done within the centres themselves with few large supermarkets specifically identified.
- Wood Green was the most popular location for comparison shopping overall across the Study Area, however, destinations for this type of shopping varied according the type of goods to be purchased and proximity to the zones. The internet was used by the majority of respondents for the purchase of electrical goods and books, CDs, toys and gifts etc. For DIY and hardware goods most respondents stated that they use large DIY stores such as B&Q Tottenham Hale, Homebase Southgate and Homebase, Arena Retail Park.
- Nearly half of the respondents regularly use the internet to buy books, CDs, toys and gifts etc. but the purchase of clothes and shoes online was also popular. 9.5% of respondents indicated that they use the internet to buy groceries.
- Across the Study Area, the most popular leisure activity is going to restaurants, followed by visiting the cinema and the theatre. The majority of respondents use leisure facilities within the borough but Central London was also popular for visiting the theatre, pubs and bars and restaurants.

5.0 In-Centre Visitor Surveys

Survey Structure

5.1 An on-street survey of visitors within 5 centres; Wood Green, Muswell Hill, Crouch End, Green Lanes and Tottenham Hale, were undertaken by NEMS. In total 606 interviews were completed. The key findings of the surveys are summarised in Appendix 7 and a copy of the detailed survey results are provided in Appendix 8. Interviews were conducted from 12^{th} to 18^{th} September 2012 inclusive (the period included weekdays and a full weekend).

Table 5.1: Survey Structure

Centre	Number of interviews
Wood Green	206
Muswell Hill	102
Crouch End	100
Green Lanes	98
Tottenham Hale	100
Total	**606**

Key Messages from the On-Street Survey Results

- All centres attract visitors for a range of activities. In most of the centres shopping for food and grocery items and other convenience goods was important. However, in Wood Green and Tottenham Hale, the purchase of non-food items was more popular.
- The average spend on food and groceries ranged from £9.61 to £17.50, and the highest was achieved in Crouch End. In terms of non-food goods, the highest average spend was achieved in Tottenham Hale (£114.50). The next highest was Wood Green (£52.11). These two centres attracted the highest proportion of clothing/footwear shoppers.
- Sustainable patterns of travel are achieved in all centres, with a high proportion of visitors walking or using public transport. The high proportion of visitors walking to the centres suggests the centres serve localised catchment areas.
- The majority of visitors to all five centres visited on average 2-3 times a week. When compared to NLP's 2008 Study this indicates that respondents are making less frequent trips. Crouch End and Muswell Hill still have the highest frequency of visits (over 3 per week) compared to the 2008 Study. Wood Green and Green Lanes have the highest proportion of respondents only visiting once a week or less.

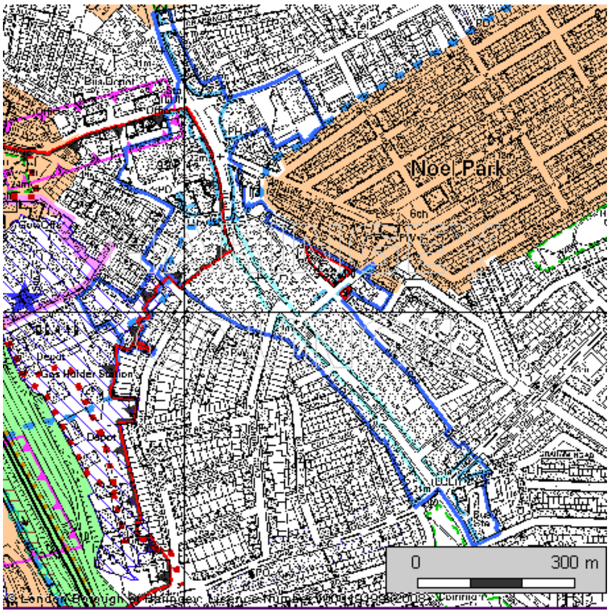
- The average length of stay was highest in Tottenham Hale with a third of respondents stating that they stayed between 1 and 1.5 hours. Visits were shortest in Green Lanes, the majority are 15 minutes or less.
- Car parking availability and charges appear to be a concern for shoppers within all centres except for Tottenham Hale. These concerns were also the most popular in the 2008 Study. The provision and quality of public toilets was also an issue raised by shoppers within all of the centres.
- In Crouch End and Muswell Hill, concerns have been raised about the markets. The general shopping environment was rated as good in all of the centres. Planting/landscaping was only rated as good in Muswell Hill and everywhere else as neutral.

6.0 Wood Green Metropolitan Centre

Introduction

6.1 Wood Green is located centrally within the borough with its shopping spine on the main north-south thoroughfare of the A105 known as the High Road. Wood Green is defined as a Metropolitan Centre in both the London Plan and Haringey's adopted Local Plan and serves shoppers from the borough and across North London. The centre fulfils a strategic shopping role providing both convenience and high and low order comparison retailers. The centre also has a significant leisure and entertainment offering serving the borough and beyond.

6.2 Wood Green Metropolitan Centre is predominantly 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 includes The Mall Wood Green (formerly known as Shopping City), a shopping centre which straddles the High Road and provides a focus for major multiple retailers located in the centre. The main supermarkets within Wood Green are evenly spread throughout the centre, with the large Morrisons supermarket located to the north of The Mall and the Sainsbury's supermarket located centrally. In addition there is a Marks & Spencer's with a food hall and Tesco Express located in the southern part of the centre, an Iceland supermarket located on Brook Road and a Lidl found within The Mall. Wood Green centre is bounded predominantly by residential areas though there are some small areas of green space adjacent to the south and light industrial/commercial type uses to the north of the centre.



Mix of Uses and Occupier Representation

6.3 Wood Green Metropolitan Centre's key roles includes:

- *convenience shopping* – including grocers, off licences, butchers, bakers, health food shops and newsagents. There are also several supermarkets including a Sainsbury's, Morrison's, an Iceland, a Lidl and a Marks & Spencer's;
- *comparison shopping* – a good range of national multiple retailers alongside a selection of independent retailers selling a range of low and high order goods;
- *services* – including a good range of cafes, restaurants and takeaways, reasonable range of high street national banks/building societies, hairdressers and beauty parlours and a few launderettes and dry cleaners;
- *leisure and entertainment* – including several pubs/bars, two cinemas, a bingo hall and a snooker hall; and
- *community uses* – including a library, a community centre, doctors, dentists, and several council offices.

6.4 Wood Green Metropolitan Centre has 337 retail/service units (excluding non-retail Class A uses). Table 6.1 sets out the mix of uses in Wood Green Metropolitan Centre, compared with the Goad national average. The centre has a broadly similar mix of uses compared with the national average except for comparison retail and vacant units. The proportion of comparison retail units is significantly higher than the national average and convenience retail is slightly above. The proportion of A1, A2 and A3/A5 services are all slightly below the national average. The proportion of vacant units is significantly below the national average.

6.5 There are several vacant units on along Wood Green High Road however, there are no obvious clusters of vacant units within the centre and the vacancy rate is much lower than the national average. The national multiple comparison and service retailers are predominantly found in the core areas of the centre, in The Mall and along the central area of the High Road. The independent comparison and service retailers are predominantly located in the peripheries of the centre.

Table 6.1 Wood Green Metropolitan Centre Use Class Mix by Unit

Type of Unit	Number of Units	Proportion of Total Number of Units (%)	
		Wood Green	National Average*
Comparison Retail	182	55.2	41.4
Convenience Retail	30	9.1	8.5
A1 Services	31	9.4	11.4
A2 Services	27	8.2	9.1
A3 and A5	49	14.8	15.9
A4	7	N/A	N/A
Vacant	11	3.3	13.7
Total	**337**	**100.0**	**100.0**

Source: Goad (27 October 2011 updated by NLP 13 September 2012)

* UK average relates to all town centres surveyed by Goad Plans (June 2012)

Retailer Representation

6.6 Wood Green Centre has a very good selection of comparison shops (182) reflecting the centre's role serving a wide catchment offering a high level and range of comparison retailers, as identified by the London Plan's designation as a Metropolitan Centre.

6.7 All categories of comparison goods identified are represented within the centre. The proportion of 'clothing and footwear' (44.0%) retail units is significantly higher than the national average (26.1%). The proportion of 'chemists, toiletries & opticians' retailers (8.8%) is slightly lower than the national average of 9.3% as is the proportion of 'jewellers, clocks & repairs' (4.4% compared to the national average 4.9%). All of the other types of comparison retail units are comparable to the national average.

6.8 There is a very good representation of major national multiple comparison retailers, these include:

- Boots the Chemist
- Superdrug
- The Body Shop
- Primark
- Wilkinson
- Argos Extra
- WH Smith
- HMV
- Game
- Maplin Electronics
- Ernest Jones
- H Samuel
- Mothercare
- BHS
- Next
- New Look
- JD Sports
- Burton
- Topshop
- Evans
- Topman
- Dorothy Perkins
- TK Maxx
- Matalan
- Marks & Spencer
- Clarks
- River Island
- H&M

Service Uses

6.9 Wood Green Centre has a good range of service uses, with a choice of service providers across all of the categories, as shown in Table 6.2. The centre has a relatively high proportion of 'restaurants, cafes and takeaways' and 'banks/other financial services' compared with the national averages. The proportion of 'estate agents and valuers', 'travel agents', 'hairdressers & beauty parlours' are all slightly lower than the national average.

Table 6.2 Wood Green Metropolitan Centre Analysis of Selected Service Uses

Type of Use	Wood Green Metropolitan Centre		UK Average*
	Units	%	%
Restaurants, cafes & takeaways	49	50.5	45.1
Banks/other financial services	16	16.5	13.4
Estate agents and valuers	9	9.3	10.7
Travel agents	2	2.1	3.5
Hairdressers & beauty parlours	18	18.5	24.6
Launderettes and dry cleaners	3	3.1	2.7
Total	**97**	**100.0**	**100.0**

Source: Goad (27 October 2011 updated by NLP 13 September 2012)

*UK average relates to all town centres surveyed by Goad Plans (June 2012)

N.B. 'Restaurants, cafés and takeaways' does not include the 7 pubs in the centre

6.10 Most high street banks/building societies are represented within Wood Green, including HSBC, Natwest, Barclays, Lloyds TSB, Santander, Halifax, Nationwide, Britannia and The Co-operative Bank. There are also several money shops and a Post Office. In addition to Class A service uses Wood Green has several other non-retail uses serving the community including a library, doctors surgeries, dental surgeries, a community hall and several council offices. Wood Green also has a well developed entertainment and leisure offer with two cinemas (Showcase and Cineworld), a Mecca Bingo hall, a Virgin Active Gym and a range of themed bars and restaurants.

Centre Audit

6.11 As part of the Study each of the primary and secondary areas of the main centres in the borough has been audited based on 35 factors and awarded a score from 1 (being 'very poor') to 5 (being 'very good'). In Wood Green the primary area considered was the central area of the High Road, between The Mall Wood Green and Turnpike Lane. The secondary area considered included the area around the junction of the High Road and Lordship lane in the north and the frontages along Westbury Avenue in the South. These areas are consistent with the primary and secondary frontages designated in the adopted UDP.

Trade Mix

6.12 As part of the study Wood Green was rated in terms of the proportion and quality of national multiple operators (comparison, convenience and services), specialist independent traders (e.g. goods a special trip will be made to the centre for) and uses associated with the evening economy (public houses, bars, restaurants, social clubs and entertainment uses). The following table represents Woof Green's score:

Performance Factor	Primary Area Score	Secondary Area Score
Proportion of specialist independent traders	2	3
Quality of specialist independent traders	3	3
Proportion of national multiple outlets	5	4
Quality of national multiple outlets	5	3
Presence of evening economy	4	5

Source: NLP Site Visit (September 2012)

6.13 The quality and proportion of specialist independent traders within the primary area is poor and is far outweighed by the proportion and quality of the national multiple outlets. In the secondary area there are more independent traders although there are also a number of lower order multiple outlets. The presence of the evening economy throughout the centre is very good, especially the secondary area of Hollywood Green, where there is a cinema and several bars and restaurants.

Anti-Social Behaviour & Security

6.14 The primary shopping area was also rated in relation to CCTV coverage, police presence, anti-social behaviour and street lighting during the NLP visit.

Performance Factor	Primary Area Score	Secondary Area Score
Evidence of begging/on–street drinking	5	4
CCTV coverage/police presence	4	4
Frequency of street lighting	4	4

Source: NLP Site Visit (September 2012)

6.15 During NLP's visit to the centre there was no evidence of on-street drinking in the primary area and little evidence of this in the secondary area. The CCTV coverage and police presence was and the frequency of street lights were rated as good throughout. Overall it was considered that Wood Green offered a relatively strong feeling of safety during the day.

Accessibility & Movement

6.16 Factors influencing accessibility and movement around the centre were considered, i.e. pedestrian/vehicular conflict, frequency of pedestrian crossings, bus stops and the location and convenience of car parks.

Performance Factor	Primary Area Score	Secondary Area Score
Location and convenience of car parks	4	4
Pedestrian/vehicular conflict	2	2
Traffic congestion	3	1
Frequency of pedestrian crossings	4	4
Frequency of bus stops	5	5
Quality of bus stops/shelters	5	5

Source: NLP Site Visit (September 2012)

6.17 Movement in and around Wood Green is an issue due to the largely linear non-pedestrianised structure of the centre along with a high volume of traffic causing significant pedestrian/vehicular conflict. In the secondary areas especially, the level of traffic congestion is very poor. These issues of pedestrian/vehicular conflict are partially eased by the good frequency of pedestrian crossings.

6.18 The main car parks serving the centre are the multi-storey car park on Bury Road, the two multi-storey car parks serving The Mall and the Morrison's multi-storey car park, which are all conveniently located. It is considered that the quality of bus stops/shelters are very good within Wood Green and appeared to be well designed.

6.19 The busiest area of the centre in terms of pedestrian footfall was identified adjacent to the Marks & Spencer store, around the lower end of the centre. The Pedestrian Flow Surveys are summarised in Appendix 9 and the full reports are contained in Appendix 10.

Cleaning & Maintenance

6.20 NLP's analysis of cleanliness and maintenance of the main centres were rated based on six separate factors. The cleanliness and maintenance of the primary area of Wood Green was reasonable with low levels of litter and detritus and little evidence of graffiti. However, there was a significant amount of chewing gum on the pavement and evidence of fly-posting. The quality of the shop frontages and fascias and the maintenance of the paving and street materials both appeared good. In the secondary area all of the factors were rated as 'neither good nor poor' with slightly less well maintained shopfronts and pavements.

Performance Factor	Primary Area Score	Secondary Area Score
Litter and street cleaning	3	3
Chewing gum on paving	1	2
Evidence of fly-posting	3	3
Evidence of graffiti	4	3
Maintenance of paving/street materials	4	3
Quality of shop frontages/fascia	4	3

Source: NLP Site Visit (September 2012)

Quality of Streetscape & Environment

6.21 The quality of the streetscape and general shopping environment were assessed within the centre based on 12 separate factors. The quality of the streetscape was rated as being of a reasonably good standard in both the primary and secondary shopping areas. The quality of the paving, street lighting and street furniture was good and modern throughout adding to the overall quality of the shopping environment.

Performance Factor	Primary Area Score	Secondary Area Score
Quality of paving/street materials	4	4
Quality of street furniture (bins and chairs)	4	4
Quantity of street furniture (bins and chairs)	4	3
Quantity/quality of Public Art	1	1
Quality of street signage/maps	2	3
Quantity of street signage/maps	3	3
Quality of design of street lighting	4	4
Quality/attractiveness of commercial properties (inc. upper floors)	2	2
Quality of planting/trees	3	4
Quantity of planting/trees	4	3
Quantity/Quality of town centre parks/public open space	1	4
Street entertainment/events/ liveliness	3	3

Source: NLP Site Visit (September 2012)

6.22 The quantity of the street signage was considered ‘neither good nor poor’ throughout however, frequency was considered to be poor in the secondary area. Both the primary and secondary areas did not have any noticeable public art. The attractiveness of the commercial properties was mixed in the primary area. The Victorian terraces along the High Road are attractive and visually appealing. However, more modern infill development and redevelopments, such as the BHS building and the large dominant red brick structure of The Mall, detract from the general attractiveness of the centre, even if the quality as commercial premises remains reasonable. In the secondary area there are further examples of visually poor modern development including the grey Hollywood Green building. There is limited open space in the primary area, however, in the secondary areas there are a number of public spaces including, Hollywood Green and Ducketts Common adjacent to the centre in the south.

Property Vacancies

6.23 When compared to the national average the vacancy levels within Wood Green are considered good. There are slightly more vacancies in the secondary areas of Wood Green however, there were no obvious clusters and limited evidence of long term vacant units.

Performance Factor	Primary Area Score	Secondary Area Score
Number of vacant units	4	2
Concentrations of vacant units	4	3
Derelict/long term vacant units	4	4

Source: NLP Site Visit (September 2012)

Summary

6.24 Overall the primary shopping area within Wood Green is considered reasonable with the average score for the 35 factors of 3.46. The primary area generally scored well on the quality of its streetscape and environment and on its trade mix and poorly in terms of its cleanliness and maintenance.

6.25 The secondary area scored slightly worse than the primary area with the average for the 35 factors totalling, 3.29. The secondary area also scored well on the quality of its trade mix, especially its provision of evening economy uses. However, like the primary area, the secondary area did not score as well on cleanliness and maintenance.

High Road facing north – Primary Area

The Mall Wood Green– Primary Area

Westbury Avenue and Turnpike Lane – Secondary Area (south)

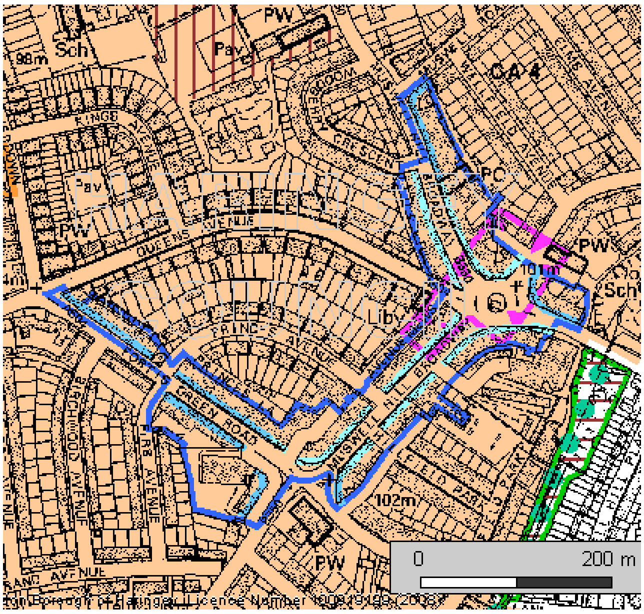
High Road facing north towards Hollywood Green – Secondary Area (north

7.0 # Muswell Hill District Centre

Introduction

7.1 Muswell Hill is characterised by distinctive Edwardian, red brick parades of shops. Muswell Hill District Centre is reasonably large, with a range of shops and services serving the local population. It is designated as a District Centre in the adopted Haringey UDP, the adopted Local Plan and the London Plan.

7.2 The District Centre is located along Muswell Hill Broadway and Fortis Green Road. The retail frontages are reasonably compact with the units along Muswell Hill Broadway and Fortis Green Road all close to the central junction of Muswell Hill Broadway, Queens Avenue and Muswell Hill, which is an open roundabout. The main supermarkets within the District Centre are located centrally, with a large Sainsbury's, Marks & Spencer's Simply Food and a Little Waitrose all close to the junctions of Muswell Hill Broadway, Fortis Green Road and Muswell Hill. All of Muswell Hill District Centre is located within the Muswell Hill Conservation Area with parts also within an Area of Archaeological Interest. The District Centre is bounded by predominantly residential areas on all sides, with Alexandra Park a short distance to the east.



Mix of Uses and Occupier Representation

7.3 Muswell Hill District Centre's key roles include:

- *convenience shopping* - including newsagents, grocers, bakers, an off licence and several health food shops. There are three supermarkets: a Sainsbury's, Marks & Spencer Simply Food and a Little Waitrose;
- *comparison shopping* - a range of comparison shops, comprising several national multiple retailers complemented by a wide range of independent retailers selling both low and higher order goods;

- *services* - including a range of high street national banks, cafés, restaurants and takeaways, laundrettes, dry cleaners, travel agents and a range of hairdressers/beauty parlours; and
- *leisure and community uses* - including several pubs and bars, the Odeon cinema and a place of worship.

7.4 Muswell Hill has 198 retail/service units (excluding non-retail Class A uses). Table 7.1 sets out the mix of uses in Muswell Hill District Centre, compared with the Goad national average.

Table 7.1 Muswell Hill Use Class Mix by Unit

Type of Unit	Number of Units	Proportion of Total Number of Units (%)	
		Muswell Hill	National Average*
Comparison Retail	84	43.3	41.4
Convenience Retail	17	8.8	8.5
A1 Services	33	17.0	11.4
A2 Services	17	8.8	9.1
A3 and A5	33	17.0	15.9
A4	4	N/A	N/A
Vacant	10	5.1	13.7
Total	**198**	**100.0**	**100.0**

Source: Goad (1 August 2011 updated by NLP 13 September 2012)

** UK average relates to all town centres surveyed by Goad Plans (June 2012)*

7.5 The centre has a similar mix of uses compared with the national average. The proportion of comparison retail units is slightly above the national average and the proportion of convenience units is comparable with the national average. The proportion of A1 and A3/A5 service units in Muswell Hill are above the national average and the proportion of A2 services is slightly below the national average. The number of vacant retail/service units is significantly lower than the national average, suggesting there is a reasonable demand for properties.

Retailer Representation

7.6 Muswell Hill has a good number of local convenience shops and A1 service retailers ensuring the centre serves its local community. However, the centre also has a reasonable number of comparison retailers, fulfilling a comparison shopping role that is distinct from the other District Centres in the borough.

7.7 All categories of comparison retail goods, except 'cars, motorcycles and motor accessories' are represented in the centre, ensuring it has a good range of comparison goods retailers.

7.8 There are good proportions of 'clothing and footwear' (10.6%) and 'chemists, drug stores and opticians' (5.1%) retailers. Muswell Hill also has a relatively good proportion of 'DIY, hardware and homeware' (3.0%) and 'furniture, carpets and textiles' (4.0%) retailers, reflecting the centres good provision of specialist retailers. Major national comparison retailers present in the centre include:

- 99p Stores
- Boots The Chemist
- Space.NK
- WH Smith
- Carphone Warehouse
- Whistles
- White Stuff
- Oliver Bonas
- Phones 4 U
- Vodafone
- Specsavers
- Moss Bros
- Clarks
- Futon Company
- Ryman
- Cancer Research UK
- Sue Ryder Care
- Oxfam
- Jojo Maman Bebe

Service Uses

7.9 Muswell Hill has a good range of service uses, with all categories represented, as shown in Table 7.2. The centre has a good proportion of 'estate agents and valuers', 'launderettes and dry cleaners' and 'hairdressers and beauty parlours' when compared with the national average. There are a slightly lower proportions of 'banks/other financial services' and 'restaurant, cafes and takeaways' than the national averages . Broadly the profile of the selected service uses is similar to the national average.

Table 7.2 Muswell Hill Analysis of Selected Service Uses

Type of Use	Muswell Hill		UK Average*
	Units	%	%
Restaurants, cafes & takeaways	33	40.3	45.1
Banks/other financial services	7	8.5	13.4
Estate agents and valuers	10	12.2	10.7
Travel agents	2	2.4	3.5
Hairdressers & beauty parlours	25	30.5	24.6
Launderettes and dry cleaners	5	6.1	2.7
Total	**79**	**100.0**	**100.0**

Source: Goad (1 August 2011 updated by NLP 13 September 2012)

* UK average relates to all town centres surveyed by Goad Plans (June 2012)

N.B. 'Restaurants, cafés and takeaways' does not include the 4 pubs in the centre

7.10 There are several high street national banks and building societies within the centre, including Santander, Barclays, Lloyds TSB, Natwest, Nationwide, HSBC and Halifax. There is also a Post Office. The centre offers a good mix of restaurants and cafes with several national chain restaurants, including Carluccio's, Giraffe and Pizza Express, complemented by a range of independent outlets. Overall Muswell Hill offers a very good mix of independent and national multiple shops, services and food and drink outlets, providing a good localised shopping function and evening destination. In addition to Class A uses there are several other community and leisure based uses including a health club, the Odeon cinema and a place of worship.

Centre Audit

7.11 As part of the study each of the primary and secondary areas of the main centres in the borough has been audited based on 35 factors and awarded a score from 1 (being 'very poor') to 5 (being 'very good'). In Muswell Hill the primary area considered was Muswell Hill Broadway and the secondary area considered was Fortis Green Road. These areas are consistent with the primary and secondary frontages designated in the adopted UDP.

Trade Mix

7.12 As part of the Study, Muswell Hill was rated in terms of the proportion and quality of national multiple operators (comparison, convenience and services), specialist independent traders (e.g. goods a special trip will be made to the centre for) and uses associated with the evening economy (public houses, bars, restaurants, social clubs and entertainment uses).

7.13 The following table represents Muswell Hill's score:

Performance Factor	Primary Area Score	Secondary Area Score
Proportion of specialist independent traders	4	5
Quality of specialist independent traders	5	5
Proportion of national multiple outlets	4	2
Quality of national multiple outlets	5	3
Presence of evening economy	4	4

Source: NLP Site Visit (September 2012)

7.14 The quality of specialist independent traders within both the primary and secondary areas was very good and the proportion of these retailers was good in the primary area and very good in the secondary. Traders provide a wide range of goods and services, especially in the primary area where independent retailers are selling high order goods such as fashion clothing and antiques. The proportion of multiple outlets was good in the primary area with a number of multiple comparison retailers, national convenience retailers and national banks. The quality of these retailers in the primary area was very good, with established high street retailers. Since NLP's last survey of the centre in 2008 a number of new national multiple outlets have opened in the centre including Whistles, Oliver Bonas and Jojo Maman Bebe, increasing the quality of the provision of national multiple outlets to very good. In the secondary area there were fewer national multiple outlets with more independent traders, specialising in furniture and interiors in particular.

7.15 The presence of evening economy was rated as good in both the primary and secondary areas with a good range of restaurants and bars. The primary area has a larger proportion of national chain restaurants and the secondary has more independent restaurants and bars. The secondary area has the added attraction of the Odeon cinema.

Anti-Social Behaviour & Security

7.16 The shopping areas were also rated in relation to CCTV coverage, police presence, anti-social behaviour and street lighting during the NLP visit.

Performance Factor	Primary Area Score	Secondary Area Score
Evidence of begging/on–street drinking	5	5
CCTV coverage/police presence	4	3
Frequency of street lighting	4	4

Source: NLP Site Visit (September 2012)

7.17 During NLP's visit to the centre there was very little evidence of on-street drinking or begging in both the primary and secondary areas. Limited CCTV coverage was visible in the primary area, but there did not appear to be any in the secondary area, though there was a visible police presence throughout the centre. The frequency of street lighting was rated well in both the primary and secondary areas. Overall, during the day, Muswell Hill had a very good feeling of safety, with no evidence of anti-social behaviour.

Accessibility & Movement

7.18 Factors influencing accessibility and movement around the centre were considered, i.e. pedestrian/vehicular conflict, frequency of pedestrian crossings, bus stops and the location and convenience of car parks.

Performance Factor	Primary Area Score	Secondary Area Score
Location and convenience of car parks	4	3
Pedestrian/vehicular conflict	3	3
Traffic congestion	3	3
Frequency of pedestrian crossings	3	3
Frequency of bus stops	4	4
Quality of bus stops/shelters	4	4

Source: NLP Site Visit (September 2012)

7.19 Movement in and around Muswell Hill is reasonably good, with only moderate levels of traffic throughout. The pedestrian/vehicular conflict was rated as 'neither good nor poor' with the frequency of pedestrian crossings reasonable, but with some scope to improve. The junction with Muswell Hill Broadway/Dukes Avenue/Queens Avenue/Muswell Hill is the busiest in the centre with the bus stand forming the central roundabout. This causes some congestion at times if a number of buses are using the junction and pulling into/out of the bus stand. The bus stand in the middle of the junction hampers pedestrian movements in this part of the centre as users have to cross all the way around which means this can be a busy junction. The pedestrian permeability of the centre is also hampered by the use of railings alongside parts of the pavement, necessitating the use of pedestrian crossings. The main car parks serving the centre are to the rear of Marks & Spencer Simply Food and the Odeon cinema. Both car parks are located conveniently for the primary and secondary areas. The primary and secondary areas both benefit from convenient bus stops, which are reasonably standard in design but well maintained bus shelters.

7.20 The busiest area of the centre in terms of pedestrian footfall was identified at the junction of Fortis Green Road, Muswell Hill Road and Muswell Hill Broadway. The Pedestrian Flow Surveys are summarised in Appendix 9 and the full reports are contained in Appendix 10.

Cleaning & Maintenance

7.21 NLP's analysis of cleanliness and maintenance within the Muswell Hill primary and secondary areas were rated based on six separate factors.

Performance Factor	Primary Area Score	Secondary Area Score
Litter and street cleaning	4	4
Chewing gum on paving	3	3
Evidence of fly-posting	4	4
Evidence of graffiti	4	3
Maintenance of paving/street materials	2	2
Quality of shop frontages/fascia	4	4

Source: NLP Site Visit (September 2012)

7.22 The cleanliness and maintenance of the primary area of Muswell Hill appeared mixed. The streets were generally litter free and clean although there were some rubbish bags by one of the bins on the street. Whilst the streets were generally clean, the street materials and maintenance of the paving was poor with many cracked area and in places piecemeal tarmac where the pavement has been dug-up previously, particularly in the secondary area. There was little evidence of fly-posting or graffiti in the primary area, although in the secondary area there was graffiti on some buildings. The quality of shop frontages and fascias appeared generally good and most do not detract significantly from the grandeur of the Edwardian parades.

Quality of Streetscape & Environment

7.23 The quality of the streetscape and general shopping environment in the primary and secondary areas were assessed within Muswell Hill based on 12 separate factors. The quality of the paving was rated as ‘poor’ throughout, with a variety of paving slabs and tarmac detracting from the overall streetscape. The quantity of street furniture throughout was considered to be ‘poor’ with very few benches located in the centre (although there was adequate provision of bins), through where there was street furniture it appeared of average quality.

Performance Factor	Primary Area Score	Secondary Area Score
Quality of paving/street materials	2	2
Quality of street furniture (bins and chairs)	2	2
Quantity of street furniture (bins and chairs)	3	2
Quantity/quality of Public Art	1	1
Quality of street signage/maps	2	2
Quantity of street signage/maps	2	2
Quality of design of street lighting	5	5
Quality/attractiveness of commercial properties (inc. upper floors)	5	5
Quality of planting/trees	3	3
Quantity of planting/trees	3	3
Quantity/Quality of town centre parks/public open space	2	1
Street entertainment/events/ liveliness	3	3

Source: NLP Site Visit (September 2012)

7.24 The attractiveness of the commercial properties in both the primary area and the secondary areas is very good. The purpose-built Edwardian shopping parades create a high quality shopping environment that is functional and attractive. Throughout, the streetscape is complemented by modern street lighting that is styled to reflect the period architecture within the centre. There is little in the way of street signage or maps and where there is, it does not necessarily contribute positively to the streetscape. The centre does not have any parks or public open space, however, it is in close proximity to Alexandra Park. The quantity of planting and trees in the centre was rated 'neither good nor poor', though the trees and planting that is in the centre is of a good quality, including several mature trees. Most of the planting is in purpose built beds by the Muswell Hill Broadway/Muswell Hill Road junction. There was some evidence of planting in pots on the railings at the bus stand junction, however, this was poor quality and didn't contribute positively to the overall streetscape. The general liveliness of the centre was deemed 'neither good nor poor' with limited on-street activity.

Property Vacancies

7.25 The number and concentration of shop vacancies were considered. When compared to the national average the vacancy level within Muswell Hill is very good. Throughout the centre there were very few vacancies, with no obvious clusters. In the secondary area there were a couple of larger vacant units.

Performance Factor	Primary Area Score	Secondary Area Score
Number of vacant units	4	4
Concentrations of vacant units	5	5
Derelict/long term vacant units	5	4

Source: NLP Site Visit (September 2012)

Summary

7.26 Overall the primary shopping area within Muswell Hill is good with the average score for the 35 factors totalling 3.54 (i.e. between 'good' and 'neither good nor poor'). Several factors in the primary area were rated 'very good' including the design of street lighting and the quality and attractiveness of commercial properties. Overall the centre is well presented, although there is room for improvement in the quality of the paving and the provision of street furniture. Enhanced planting and signage would help to improve the overall quality of the streetscape making it a more attractive centre to visit.

7.27 The secondary area also scored well with an average for the 35 factors totalling 3.29, which is slightly worse than the primary area. Generally the secondary area scored worse than the primary area on the number and quality of national multiple outlets, though overall there was little difference between the primary and secondary areas. The secondary area appears to have an important role in terms of the provision of specialist independent restaurants/cafes and retailers.

Muswell Hill Broadway facing south – Primary Area

Muswell Hill Broadway facing north – Primary Area

Junction of Muswell Hill Broadway/Queens Avenue/Dukes Avenue – Primary Area

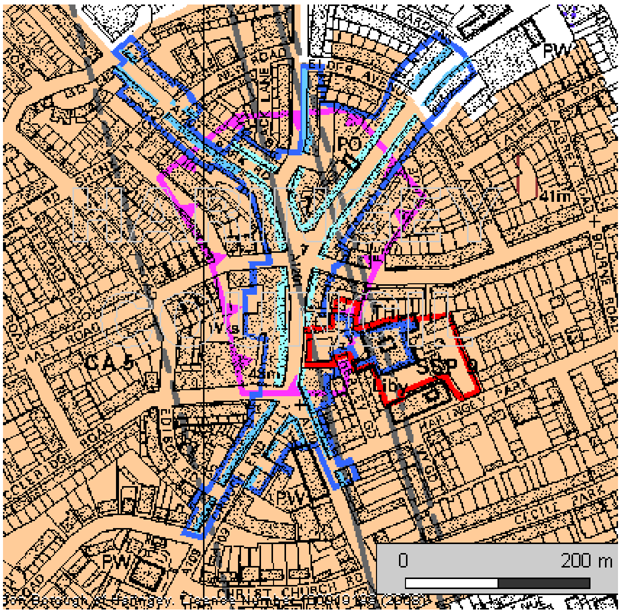
Fortis Green Road facing north – Secondary Area

8.0 Crouch End District Centre

Introduction

8.1 Crouch End is characterised by largely Victorian developments with the iconic Crouch End Clock Tower located at its centre. The District Centre is reasonably large, with a range of shops and services serving the local population. It is designated as a District Centre in the Haringey UDP, the adopted Local Plan and the London Plan.

8.2 The District Centre is arranged around the convergence of several roads into The Broadway at the centre of Crouch End. The retail frontages are reasonably compact with units along Park Road, Middle Lane, Tottenham lane, Crouch End Hill and Crouch Hill all located close to the retail frontages on The Broadway. The main supermarkets within the District Centre are located centrally, with a large Budgens, Tesco Express, Marks & Spencer's Simply Food and a Little Waitrose all on The Broadway. The majority of the District Centre is located within the Crouch End Conservation Area with parts also within an Area of Archaeological Interest. The District Centre is bounded by predominantly residential areas on all sides.



Mix of Uses and Occupier Representation

8.3 Crouch End shopping centre's key roles include:

- *convenience shopping* - including newsagents, grocers, butchers, bakers, a fishmonger and off licences. There are several convenience stores, including a Budgens, a Tesco Express, a Waitrose and a Marks & Spencer Simply Food;

- *comparison shopping* - a number of comparison shops, comprising a range of independent retailers selling both low and higher order goods, with a small number of national multiple retailers;
- *services* - including a range of high street national banks, a number of cafés/restaurants/takeaways, laundrettes, dry cleaners, photo processing shops and a range of hairdressers/beauty parlours; and
- *leisure and community uses* - including several pubs and bars, a Virgin Active Gym, doctors surgeries and a place of worship.

8.4 Crouch End has 259 retail/service units (excluding non-retail Class A uses). Table 8.1 sets out the mix of uses in Crouch End District Centre, compared with the Goad national average. The centre has a broadly similar mix of uses compared with the national average. The main exception is the proportion of vacant units which is below the national average. The proportion of comparison retail units is below the national average whilst the proportion of A1 and A2 service retailers is comparable to the national average. The proportion of A3/A5 units and convenience retail units in Crouch End are all slightly above the national averages.

Table 8.1 Crouch End Use Class Mix by Unit

Type of Unit	Number of Units	Proportion of Total Number of Units (%)	
		Crouch End	National Average*
Comparison Retail	98	37.1	41.4
Convenience Retail	25	9.5	8.5
A1 Services	32	11.7	11.4
A2 Services	24	9.1	9.1
A3 and A5	45	17.1	15.9
A4	12	5.3	N/A
Vacant	23	8.7	13.7
Total	**259**	**100.0**	**100.0**

Source: Goad (23 May 2011 updated by NLP 14 September 2012)

* UK average relates to all town centres surveyed by Goad Plans (xxx)

Retailer Representation

8.5 Crouch End has a good number of local convenience shops and A1 service retailers reflecting the centre's role as a District Centre, serving the local community, as identified by The London Plan's classification. The centre also has a reasonable number of comparison retailers, although these fulfil a predominantly local comparison shopping role.

8.6 Crouch End provides a range of goods across all categories, except 'cars, motorcycles and motor accessories'. There are healthy numbers of both 'clothing and footwear' (27.6%) and 'chemists, drug stores and opticians' (10.2%). Crouch End also has a relatively good proportion of 'furniture, carpets and textiles' (9.2%) retailers. There are smaller proportions of 'vehicle repairs & services' (6.1%), 'electrical & other durable goods' (4.1%) and 'DIY, hardware and household goods' (4.1%). Major national comparison retailers present in the centre include:

- Jojo Maman Bebe
- Specsavers
- Carphone Warehouse
- Boots The Chemist
- Oliver Bonas
- Cancer Research UK
- T-Mobile
- Blockbuster

Service Uses

8.7 Crouch End has a good range of service uses, with all categories except travel agents represented, as shown in Table 8.2. The centre has a good proportion of 'estate agents and valuers', 'hairdressers and beauty parlours' and 'launderettes and dry cleaners' in comparison with the national average. There is a lower proportion of 'banks/other financial services' than the national average with a comparable proportion of 'restaurants, cafes and takeaways' to the national average.

Table 8.2 Crouch End Analysis of Selected Service Uses

Type of Use	Crouch End		UK Average*
	Units	%	%
Restaurants, cafes & takeaways	45	45.0	45.1
Banks/other financial services	7	7.0	13.4
Estate agents and valuers	17	17.0	10.7
Travel agents	0	0.0	3.5
Hairdressers & beauty parlours	26	26.0	24.6
Launderettes and dry cleaners	5	5.0	2.7
Total	**100**	**100.0**	**100.0**

Source: Goad (23 May 2011 updated by NLP 14 September 2012)

* UK average relates to all town centres surveyed by Goad Plans (xxx)
N.B. 'Restaurants, cafés and takeaways' does not include the 12 pubs in the centre

8.8 There are several high street national banks and building societies within the centre, including Santander, Barclays, Lloyds TSB, Natwest, Nationwide and Halifax and there is also a Post Office. There are also a range of other service uses including several national chain bookmakers and photo processing shops. Overall Crouch End offers a very good mix of independent and national multiple shops, services and food and drink outlets, providing a good localised shopping function. In addition to Class A uses there are several other community and leisure based uses including health clubs, council officers, a health centre and a place of worship.

Centre Audit

8.9 As part of the study each of the primary and secondary areas of the main centres in the borough have been audited based on 35 factors and awarded a score from 1 (being 'very poor') to 5 (being 'very good'). In Crouch End the primary area considered was The Broadway and the area around Crouch End Clock Tower. The secondary areas considered were the frontages along Crouch End Hill, Park Road and the northern end of the Tottenham Lane retail parades. These areas are consistent with the primary and secondary frontages designated in the adopted UDP.

Trade Mix

8.10 As part of the study Crouch End was rated in terms of the proportion and quality of national multiple operators (comparison, convenience and services), specialist independent traders (e.g. goods a special trip will be made to the centre for) and uses associated with the evening economy (public houses, bars, restaurants, social clubs and entertainment uses). The following table represents Crouch End's score:

Performance Factor	Primary Area Score	Secondary Area Score
Proportion of specialist independent traders	4	5
Quality of specialist independent traders	4	4
Proportion of national multiple outlets	3	2
Quality of national multiple outlets	4	3
Presence of evening economy	3	3

Source: NLP Site Visit (September 2012)

8.11 The quality of specialist independent traders within both the primary and secondary areas is good, with traders providing a range of goods and services. The proportion of specialist independent traders is very good in the secondary area as there are limited numbers of national multiple retailers compared to the primary area. The proportion of national multiple outlets was 'neither good nor poor' in the primary area with a number of multiple comparison retailers, national convenience retailers and national banks (but a lower proportion in comparison with other centres in the Study Area, such as Muswell Hill). The quality of these retailers in the primary area was good, with established high street retailers such as Boots, Carphone Warehouse and Oliver Bonas present. In the secondary area there were fewer national multiple outlets, although the

Marks & Spencer Simply Food on Crouch End Hill acts as an anchor for the southern periphery of the centre.

8.12 The presence of evening economy was rated 'neither good nor poor' in both the primary and secondary areas with a reasonable number of restaurants and public houses spread throughout the centre. The majority of the restaurants, cafes and bars are run by independent traders with only a limited number of national multiple retailers.

Anti-Social Behaviour & Security

8.13 The shopping areas were also rated in relation to CCTV coverage, police presence, anti-social behaviour and street lighting during the NLP visit.

Performance Factor	Primary Area Score	Secondary Area Score
Evidence of begging/on–street drinking	5	4
CCTV coverage/police presence	5	4
Frequency of street lighting	4	4

Source: NLP Site Visit (September 2012)

8.14 During NLP's visit to the centre there was no evidence of on-street drinking or begging. CCTV coverage was visible in both primary and secondary areas and there was police presence in the primary area. The frequency of street lights rated well in both the primary and secondary areas. Overall, during the day, Crouch End had a very good feeling of safety, with little evidence of anti-social behaviour.

Accessibility & Movement

8.15 Factors influencing accessibility and movement around the centre were considered, i.e. pedestrian/vehicular conflict, frequency of pedestrian crossings, bus stops and the location and convenience of car parks.

Performance Factor	Primary Area Score	Secondary Area Score
Location and convenience of car parks	3	2
Pedestrian/vehicular conflict	2	4
Traffic congestion	1	4
Frequency of pedestrian crossings	4	4
Frequency of bus stops	4	4
Quality of bus stops/shelters	4	3

Source: NLP Site Visit (September 2012)

8.16 Movement in and around Crouch End is an issue due to the high volume of traffic, which converges onto The Broadway from several roads. This means that congestion is highest in the primary area, but less so in the secondary areas where the traffic is more dispersed. This also means there is more pedestrian vehicular conflict in the primary area, although this is partially mitigated by the good frequency of pedestrian crossings.

8.17 The main car park serving the centre is to the rear of Budgens, which is located centrally but has a relatively small capacity (although when we visited the car park it was only half full). The primary and secondary areas both benefit from convenient bus stops, although the quality of the bus stops was considered better in the primary area.

8.18 The busiest area of the centre in terms of pedestrian footfall was identified adjacent the Budgens store on The Broadway which is in the central area of the centre. The Pedestrian Flow Surveys are summarised in Appendix 9 and the full reports are contained in Appendix 10.

Cleaning & Maintenance

8.19 NLP's analysis of cleanliness and maintenance within the Crouch End primary and secondary areas were rated based on six separate factors.

Performance Factor	Primary Area Score	Secondary Area Score
Litter and street cleaning	4	4
Chewing gum on paving	4	3
Evidence of fly-posting	4	2
Evidence of graffiti	4	3
Maintenance of paving/street materials	3	3
Quality of shop frontages/fascia	3	3

Source: NLP Site Visit (September 2012)

8.20 The cleanliness and maintenance of the primary area of Crouch End was generally good. The primary area appeared slightly cleaner, with less chewing gum on the pavements, less graffiti and less fly-posting than the secondary area. The maintenance of street materials throughout was considered reasonable, although with some cracked paving in places. Generally the quality of shop frontages and fascias were reasonable throughout although some of the shop frontages appeared out of context with the good quality architecture of the buildings in the centre. In the secondary area, some of the fascias appeared in need of refurbishment with parts of signs/letters on shop fascias missing.

Quality of Streetscape & Environment

8.21 The quality of the streetscape and general shopping environment in the primary and secondary areas were assessed within Crouch End based on 12 separate factors. The quality of the paving was rated as 'good' in the primary area and 'neither good nor poor' in the secondary area. The quantity and quality of street furniture in the primary area was considered to be 'good', with a good provision of bins and benches, although in the secondary area there were fewer which were not as well maintained.

Performance Factor	Primary Area Score	Secondary Area Score
Quality of paving/street materials	4	3
Quality of street furniture (bins and chairs)	4	3
Quantity of street furniture (bins and chairs)	4	3
Quantity/quality of Public Art	4	1
Quality of street signage/maps	3	3
Quantity of street signage/maps	3	2
Quality of design of street lighting	5	5
Quality/attractiveness of commercial properties (inc. upper floors)	4	3
Quality of planting/trees	5	3
Quantity of planting/trees	4	2
Quantity/Quality of town centre parks/public open space	4	1
Street entertainment/events/ liveliness	3	2

Source: NLP Site Visit (September 2012)

8.22 The attractiveness of the commercial properties in the primary area along The Broadway is good, with the Victorian buildings enhancing the character of the centre and the modern infill developments not significantly detracting from the environmental quality. The shop fascias in the primary area could benefit from improved maintenance to enhance the overall attractiveness of the commercial properties within this area. The Clock Tower provides an architectural focus for the primary area and acts as an historical piece of public art.

8.23 In the secondary area the attractiveness of the commercial properties is 'neither good nor poor', and there is less in the way of public art and visual interest. The buildings in the secondary area are of less historical interest and the shop fascias are in need of maintenance to improve the quality of this area. Throughout the centre, the streetscape is complemented by modern street lighting that is styled to reflect the Victorian nature of the centre. Across both the primary and secondary areas, there are areas of relatively narrow paving which can hinder pedestrian movements, particularly given how busy the road network is in the centre.

8.24 At the centre of the primary area there is a small green area with mature trees, flower beds and hanging baskets on the street lights, which significantly adds to environmental quality of the centre. The secondary area does not have any significant public open space and has less in the way of planting and trees. The general liveliness of the centre was deemed reasonable with a good number of people in the primary area though markedly less in the secondary areas.

Property Vacancies

8.25 When compared to the national average the vacancy level within Crouch End is good. In the primary area there were very few vacancies, although in the secondary areas, especially in peripheral locations, there were more vacancies observed but no evident clusters.

Performance Factor	Primary Area Score	Secondary Area Score
Number of vacant units	4	3
Concentrations of vacant units	4	3
Derelict/long term vacant units	4	3

Source: NLP Site Visit (September 2012)

Summary

8.26 Overall the primary shopping area within Crouch End is considered reasonable with the average score for the 35 factors totalling 3.74 (i.e. closer to ‘good’ than ‘neither good nor poor’). Several factors in the primary area were rated ‘very good’ including the quality of planting/trees and the design of street lighting. Overall the centre scored very well on its environmental quality in the primary area but with scope for improvement in the secondary area. The traffic and vehicle/pedestrian conflict in the primary area was considered relatively poor.

8.27 The secondary area scored slightly worse than the primary area with the average for the 35 factors totalling 3.09, a ‘neither good nor poor’ rating. The secondary area had two factors rated ‘very good’, the quality of design of street lighting and ‘proportion of specialist independent traders’, and many factors rated as ‘good’. The secondary area generally scored poorly on the quantity/quality of open space and the quantity of public art.

Crouch End Clock Tower – Primary Area

Tottenham Lane – Primary Area

Broadway Parade North (Tottenham Lane) – Secondary Area

Crouch End Hill facing north – Secondary Area

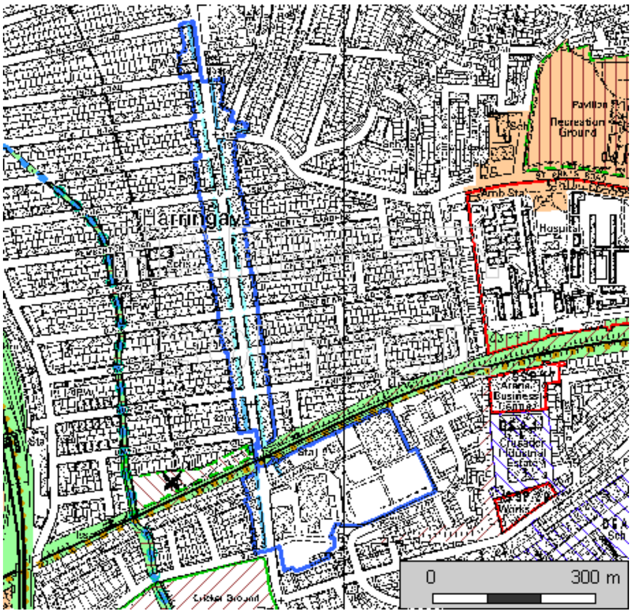
9.0 Green Lanes District Centre

Introduction

9.1 Green Lanes is a long established shopping street and is the main north-south route through the Harringay area. The centre serves an important local function to shoppers from the borough and the Harringay locale. It is designated as a District Centre in the Haringey UDP, the adopted Local Plan and the London Plan.

9.2 The 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 boundary also envelopes Arena Shopping Park and retail units off of Williamson Road, on the sites of the former Harringay Stadium and Arena.

9.3 The main supermarkets within the centre are evenly spread throughout the length of Green Lanes District Centre. A large Sainsbury's supermarket is situated south of the railway line adjacent to Arena Shopping Park. A smaller Iceland supermarket is situated fairly centrally on Green Lanes within Grand Parade and a Tesco Express is situated at the northern end of the District Centre. Green Lanes District Centre is predominantly bounded by residential areas on both sides.



Mix of Uses and Occupier Representation

9.4 Green Lanes shopping centre's key roles include:

- *convenience shopping* - including newsagents, grocers, butchers, bakeries, off licences and deli's. There are several convenience stores, many of which of independent. Of the national supermarket retailers there is a Sainsbury's, an Iceland and a Tesco Express;
- *comparison shopping* - a limited selection of comparison shops, comprising a range of independent retailers complemented with several national multiple retailers located within Arena Shopping Park;
- *services* - including a range of high street national banks, a large number of cafés/restaurants/takeaways, a small number of travel agents, one laundrette and a number of hairdressers/beauty parlours; and
- leisure and community uses - including several pubs and bars, social clubs, doctor and dental surgeries and a place of worship.

9.5 Green Lanes has 204 retail/service units (excluding non-retail Class A uses). Table 9.1 sets out the mix of uses in Green Lanes District Centre, compared with the Goad national average. Compared to the national average comparison retail, A2 services and vacant units have lower proportions than the national average. Levels of convenience retail, A1 services and A3/A5 services are higher than the national average.

Table 9.1 Green Lanes Use Class Mix by Unit

Type of Unit	Number of Units	Proportion of Total Number of Units (%)	
		Green Lanes	National Average*
Comparison Retail	70	34.3	41.4
Convenience Retail	29	14.2	8.5
A1 Services	31	15.2	11.4
A2 Services	18	8.8	9.1
A3 and A5	38	18.6	15.9
A4	4	2.0	N/A
Vacant	14	6.9	13.7
Total	**204**	**100.0**	**100.0**

Source: Goad (30 August 2011 updated by NLP 13 September 2012)
* UK average relates to all town centres surveyed by Goad Plans (June 2012)

Retailer Representation

9.6 Green Lanes has a good number of local convenience shops and service retailers reflecting the centre's role as a District Centre, serving the local community, as identified by The London Plan's classification. Green Lanes has limited selection of comparison shops. The close proximity of Wood Green, which performs the main comparison retail role within the borough, complements Green Lanes limited selection of predominantly independent comparison retailers.

9.7 ‘Clothing and footwear’ units account for a relatively small proportion of units (9.1%) in comparison with the national average (26.1%). The proportion of ‘jewellers’ (14.3%) is particularly high in relation to the national average of 4.9%. ‘Furniture, carpets and textiles’ and ‘chemists, drug stores and opticians’ are both higher than the national average. Major national comparison retailers present in the centre include:

- Homebase
- Sports Direct
- Carphone Warehouse
- Superdrug
- Argos
- Peacocks
- Next

9.8 All of the major national comparison retailers in Green Lanes District Centre are located on Arena Shopping Park. There are a very small number of lower order national comparison retailers on Green Lanes, including charity shops.

Service Uses

9.9 Green Lanes has a good range of service uses, with all categories represented, as shown in Table 9.2. The centre has slightly higher proportion of ‘restaurants, cafes and takeaways’, ‘estate agents and valuers’, ‘travel agents’ and ‘launderettes and dry cleaners’ when compared with the national average. The proportion of ‘banks and other financial services’ is significantly below the national average, and ‘hairdressers and beauty parlours’ is also slightly below the national average.

Table 9.2 Green Lanes Analysis of Selected Service Uses

Type of Use	Green Lanes		UK Average*
	Units	%	%
Restaurants, cafes & takeaways	42	48.8	45.1
Banks/other financial services	5	5.8	13.4
Estate agents and valuers	13	15.2	10.7
Travel agents	5	5.8	3.5
Hairdressers & beauty parlours	16	18.6	24.6
Launderettes and dry cleaners	5	5.8	2.7
Total	**86**	**100.0**	**100.0**

Source: Goad (30 August 2011 updated by NLP 13 September 2012)
* UK average relates to all town centres surveyed by Goad Plans (June 2012)
N.B. ‘Restaurants, cafés and takeaways’ does not include the 4 pubs in the centre

9.10 There are two high street national banks; Santander and Barclays. There is a noticeable divide in terms of the retail offer between Arena Shopping Park and the main part of Green Lanes to the north of the railway line. Arena Shopping Park contains the District Centre's large national retailers, whilst Grand Parade and Green Lanes offer a good mix of independent shops and services (particularly food and drink) offers, providing a localised shopping function. In addition to Class A uses there are also several other community and leisure based uses including doctor's surgeries, social clubs and a place of worship.

Centre Audit

9.11 As part of the study the primary and secondary areas of the main centres in the borough has been audited based on 35 factors and awarded a score from 1 (being very poor) to 5 (being very good). In Green Lanes the primary area considered was the central area of Green Lanes between the junctions with Salisbury Road and Roseberry Garden and the secondary area considered was the north area of Green Lanes including Salisbury Promenade. These areas are consistent with the primary and secondary frontages designated in the adopted UDP. Arena Shopping Park has not been considered within the audit given its different shopping character in comparison with the primary and secondary areas of Green Lanes. An audit of the Shopping Park has been separately carried out and is included.

Trade Mix

9.12 As part of the study Green Lanes was rated in terms of the proportion and quality of national multiple operators (comparison, convenience and services), specialist independent traders (e.g. goods a special trip will be made to the centre for) and uses associated with the evening economy (public houses, bars, restaurants, social clubs and entertainment uses). The following table represents Green Lanes' score:

Performance Factor	Primary Area Score	Secondary Area Score
Proportion of specialist independent traders	4	4
Quality of specialist independent traders	3	2
Proportion of national multiple outlets	2	1
Quality of national multiple outlets	3	2
Presence of evening economy	4	4

Source: NLP Site Visit (September 2012)

9.13 The proportion of specialist independent traders within both the primary and secondary areas is good, with a number of traders providing specialist ethnic goods and produce. The quality of these independent traders is reasonable, however, the proportion of multiple retailers was rated as poor with only a small number of national multiple outlets on Green Lanes and the general quality of those outlets was mixed from established brands, such as Iceland and the national banks in the primary area and Tesco in the secondary area, to charity shops.

9.14 The presence of evening economy was quite good in both the primary and secondary areas. In the primary area there is a good range of restaurants and takeaways and in the secondary area there are further restaurants and evening uses including The Salisbury Public House.

Anti-Social Behaviour & Security

9.15 The shopping areas were also rated in relation to CCTV coverage, police presence, anti-social behaviour and street lighting during the NLP visit.

Performance Factor	Primary Area Score	Secondary Area Score
Evidence of begging/on–street drinking	5	5
CCTV coverage/police presence	3	3
Frequency of street lighting	5	5

Source: NLP Site Visit (September 2012)

9.16 During NLP's visit to the centre there was no evidence of either on-street drinking or begging. CCTV coverage and police presence was rated as reasonable throughout the centre. The frequency of street lights rated well in both the primary and secondary areas. Overall, during the day, Green Lanes appeared reasonably safe, with little evidence of anti-social behaviour.

Accessibility & Movement

9.17 Factors influencing accessibility and movement around the centre were considered, i.e. pedestrian/vehicular conflict, frequency of pedestrian crossings, bus stops and the location and convenience of car parks.

Performance Factor	Primary Area Score	Secondary Area Score
Location and convenience of car parks	1	2
Pedestrian/vehicular conflict	1	1
Traffic congestion	2	2
Frequency of pedestrian crossings	3	2
Frequency of bus stops	3	3
Quality of bus stops/shelters	2	2

Source: NLP Site Visit (September 2012)

9.18 Movement in and around Green Lanes is an issue due to the largely linear non-pedestrianised structure of the centre along with the high volumes of traffic. This is slightly mitigated by pedestrian crossings which are reasonable frequent within the primary areas. The main car park serving the centre is the Arena Shopping Park car park which is located adjacent to the secondary frontages south of the railway line, but is not located centrally for those wishing to move around the primary area. The provision of bus stops is reasonable, and the centre benefits from good public transport links by bus to other areas within the borough and into other parts of London.

9.19 The busiest area of the centre in terms of pedestrian footfall was identified at the bottom end of Green Lanes near to the station. The Pedestrian Flow Surveys are summarised in Appendix 9 and the full reports are contained in Appendix 10.

Cleaning & Maintenance

9.20 NLP's analysis of cleanliness and maintenance within the Green Lanes primary and secondary areas were rated based on six separate factors.

Performance Factor	Primary Area Score	Secondary Area Score
Litter and street cleaning	4	3
Chewing gum on paving	3	3
Evidence of fly-posting	4	3
Evidence of graffiti	4	4
Maintenance of paving/street materials	3	2
Quality of shop frontages/fascia	3	2

Source: NLP Site Visit (September 2012)

9.21 The cleanliness and maintenance of Green Lanes was reasonable overall. The primary area appeared slightly cleaner than the secondary area in terms litter, chewing gum and evidence of fly-posting, though neither area was considered poor. There was little evidence graffiti throughout the centre. The maintenance of street materials in the primary area was considered reasonable, however, in the secondary area there was evidence of cracked paving and uneven surfaces in places. Generally the quality shop frontages and fascias were reasonable in the primary area and poor in the secondary with many appearing in need of maintenance or incongruous with architecture of the Grand Parade architecture.

Quality of Streetscape & Environment

9.22 The quality of the streetscape and general shopping environment in the primary and secondary areas were assessed within Green Lanes based on 12 separate factors. The quality of the streetscape was rated as being of a poor standard within the primary shopping area, with the majority of factors rated as 'poor or reasonable'. The attractiveness of the commercial properties along Grand Parade is reasonable within the primary area. The secondary area's streetscape and environment is also generally poor, though the quality of paving is slightly poorer than the primary area.

Performance Factor	Primary Area Score	Secondary Area Score
Quality of paving/street materials	3	2
Quality of street furniture (bins and chairs)	3	3
Quantity of street furniture (bins and chairs)	3	3
Quantity/quality of Public Art	1	1
Quality of street signage/maps	2	2
Quantity of street signage/maps	3	3
Quality of design of street lighting	3	3
Quality/attractiveness of commercial properties (inc. upper floors)	3	2
Quality of planting/trees	2	2
Quantity of planting/trees	2	1
Quantity/Quality of town centre parks/public open space	1	1
Street entertainment/events/ liveliness	1	1

Source: NLP Site Visit (September 2012)

9.23 Throughout the centre the quality of design of street lighting is reasonable, however the standard street lighting does not reflecting the Victorian character of the centre. There is limited public open space in the centre with the nearest park being Finsbury Park to the south. The general liveliness of the centre was deemed relatively very poor in both the primary area and secondary area, with very few on-street activities. There was no public art within Green Lanes.

Property Vacancies

9.24 The number and concentration of shop vacancies were considered. When compared to the national average the vacancy level within Green Lanes is reasonably good. There did not appear to be any concentrations of vacant units, however there was some evidence of long term vacant units, especially in the primary area.

Performance Factor	Primary Area Score	Secondary Area Score
Number of vacant units	4	4
Concentrations of vacant units	4	4
Derelict/long term vacant units	2	3

Source: NLP Site Visit (September 2012)

Arena Shopping Park

9.25 Arena Shopping Park is a retail park located in the south of the District Centre, adjacent to Harringay Green Lanes railway station. Arena Shopping Park is a recent development and includes a number of large format units occupied by national multiple retailers. The modern appearance of the retail park is wholly different to the rest of Green Lanes District Centre, though it retains a reasonably good environment and has a good selection of comparison retailers.

9.26 Arena Shopping Park is located on the edge of Green Lanes District Centre and has its own extensive car parking, with a significantly different retail offer to the retail units on Green Lanes. This potentially means that shoppers may visit the retail park in isolation and not necessarily visit the rest of the centre. In general Arena Shopping Park has a good environment and appeared well kept with reasonable buildings of a relatively standard retail park aesthetic.

Summary

9.27 Overall the primary shopping area within Green Lanes is considered reasonable with the average score for the 35 factors totalling 2.83. Five factors in the primary area were each given a rating of ‘very poor’ and ‘quite poor’.

9.28 The secondary area is also considered reasonable, although the average score for the 35 factors is slightly below the primary area totalling 2.57. Six secondary were factors rated ‘very poor’ while a further 12 were rated as ‘quite poor’.

Southern Grand Parade looking north – Primary Area

Centre Grand Parade looking north –Primary Area

Green Lanes – Secondary Area

Colina Road – Secondary Area

10.0 # Tottenham Hale

Introduction

10.1 Tottenham Hale is a retail park located in the eastern part of the borough. Whilst Tottenham Hale is not currently a designated centre in the Haringey UDP, the adopted Local Plan and the London Plan state that it is a ‘potential future change to the town centre network’. Subject to capacity and health check analysis, it is stated that Tottenham Hale could be designated as a District Centre over the plan period.

10.2 A health check has therefore been carried out of the Retail Park to assist the Council in its consideration of whether the retail park should be afforded District Centre status.

10.3 Tottenham Hale has a standard Retail Park design with large retail warehouse style units which wrap around a central car parking area. The Retail Park includes several large retail outlets selling predominantly a range of bulky goods, but there is also a selection of clothing and footwear retailers and a Lidl providing convenience goods. Along the north frontage of the Retail Park, adjacent to Ferry Lane, are a number of smaller units which are occupied by fast food and telephone retailers.

10.4 An industrial estate is situated to the south and the A503 one way system is to the north of the Retail Park. The centre is located next to Tottenham Hale Station which provides good transport links to the surrounding area along with London Liverpool Street as well as Stansted Airport.

Tottenham Hale Urban Centre Masterplan Area

Background

10.5 Tottenham Hale Urban Centre Masterplan SPD was published in October 2006. The Masterplan states that the existing retail park will become a higher quality location, with a more diverse range of goods, including convenience shopping. As phased redevelopment is undertaken, the Retail Centre will provide a wider, more varied, offer of goods for the existing and new communities than currently exists at Tottenham Hale.

10.6 Within the London Plan (2011) Tottenham Hale is part of the Upper Lee Valley Opportunity Area and the Plan states that at Tottenham Hale the local road network requires reorganisation to enable more efficient use of the land. Improvements to capacity of the underground station, new bus infrastructure and services are needed to deliver higher density, mixed-use development. The Plan also states that there is potential to change Tottenham Hale to a District Centre in the future.

10.7 The Haringey Local Plan Strategic Policies Document (2013) states that given the existing scale, role and function and mixed use development which is currently taking place at Tottenham Hale there may be potential to designate Tottenham Hale Urban Centre as a new District Centre.

10.8 Tottenham Hale offers an opportunity to expand the retail offer in the area, particularly, comparison shopping, and improve the frontage onto Ferry Lane. All of these future changes present an opportunity to review shopping provision and encourage uses that provide cohesion and connectivity to the two district centres, namely Tottenham/Bruce Grove and Seven Sisters/West Green Road, which are in the same locality (para. 5.3.54).

10.9 Policy SP10 states:

"It is possible to identify potential future changes to the borough's town centres over the life of the Core Strategy including potential new centres. Given the existing scale, role and function and mixed use development which is currently taking place at Tottenham Hale there may be potential to designate Tottenham Hale Urban Centre as a new District Centre"

10.10 The Inspector's Report into the Haringey Local Plan: Strategic Policies, 2012 recommends that the following wording is included in relation to Tottenham Hale:

"In line with section 23 of the NPPF and the London Plan, it is the Council's intention to designate Tottenham Hale as a District Centre over the life of the Local Plan: Strategic Policies. Further detail regarding this designation will be set out in an Area Action Plan for Tottenham Hale"

Mix of Uses and Occupier Representation

10.11 Tottenham Hale's key roles include:

- *convenience shopping* – Lidl supermarket;

- *comparison shopping* – a range of national multiple retailing shops selling a range of predominantly low order goods; and
- *services* – a selection of takeaway and fast food restaurants as well as a coffee house.

10.12 Tottenham Hale has 25 retail/service units (excluding non-retail Class A uses). Table 10.1 sets out the mix of uses in Tottenham Hale, compared with the Goad national average. Compared to the national average comparison retail at Tottenham Hale is significantly higher and convenience retail is broadly comparable. The centre has a limited range of services as there are no A2 services or A4 units and A1 services are well below the national average. The provision of A3 and A5 services is above the national average and these are all occupied by national multiple retailers such as KFC, Pizza Hut and Burger King. There are no vacant units at the Retail Park.

Table 10.1 Tottenham Hale Use Class Mix by Unit

Type of Unit	Number of Units	Proportion of Total Number of Units (%)	
		Tottenham Hale	National Average*
Comparison Retail	17	68.0	41.4
Convenience Retail	2	8.0	8.5
A1 Services	1	4.0	11.4
A2 Services	0	0.0	9.1
A3 and A5	5	20.0	15.9
A4	0	0.0	N/A
Vacant	0	0.0	13.7
Total	**25**	**100.0**	**100.0**

Source: Goad (30 August 2011 updated by NLP 13 September 2012)

* UK average relates to all town centres surveyed by Goad Plans (June 2012)

Retailer Representation

10.13 As Tottenham Hale is a purpose built Retail Park, it has a good provision of national multiple retailers but, there are no local/specialist retailers/traders operating from the Retail Park. Although Tottenham Hale has a large proportion of comparison retailers, these predominantly provide bulky goods including, electrical, furniture, DIY and homeware goods.

10.14 Tottenham Hale has a very limited provision of ‘clothing and footwear’ goods as there are only two units selling these goods. ‘Electrical and Other Durable Goods’ and ‘Telephones and Accessories’ account for a large proportion of units at the Retail Park, 23.5% and 17.6% respectively. Major national comparison retailers present in the centre include:

- Next
- Carpet Right
- Comet
- PC World
- B&Q
- Argos
- JD Sports
- Boots
- Poundworld
- Halfords
- O2
- Carphone Warehouse
- Orange
- Asda Living

Service Uses

10.15 Tottenham Hale has a good range of A3 and A5 services and these comprise the full service range at the Retail Park. There is no provision of any services, other than 'restaurants, cafes & takeaways' as set out in Table 10.2.

Table 10.2 Tottenham Hale Analysis of Selected Service Uses

Type of Use	Tottenham Hale		UK Average*
	Units	%	%
Restaurants, cafes & takeaways	6	100.0	45.1
Banks/other financial services	0	0.0	13.4
Estate agents and valuers	0	0.0	10.7
Travel agents	0	0.0	3.5
Hairdressers & beauty parlours	0	0.0	24.6
Launderettes and dry cleaners	0	0.0	2.7
Total	**6**	**100.0**	**100.0**

Source: Goad (30 August 2011 updated by NLP 13 September 2012)

* UK average relates to all town centres surveyed by Goad Plans (June 2012)

Centre Audit

10.16 As part of the study each of the primary and secondary areas of the main centres in the borough has been audited based on 35 factors and awarded a score from 1 (being 'very poor') to 5 (being 'very good'). Unlike the other districts which we have examined Tottenham Hale has been created as a retail park and therefore only as a primary area which is the park itself and the units to on the opposite side of Ferry Lane. Therefore, we will only be auditing the primary area for the centre. The centre is also not listed as either primary or secondary frontages in the adopted UDP.

Trade Mix

10.17 As part of the study Tottenham Hale was rated in terms of the proportion and quality of national multiple operators (comparison, convenience and services), specialist independent trader (e.g. goods a special trip will be made to the centre for) and uses associated with the evening economy (public houses, bars, restaurants, social clubs and entertainment uses). The following table represents Tottenham Hales score:

Performance Factor	Primary Area Score
Proportion of specialist independent traders	0
Quality of specialist independent traders	0
Proportion of national multiple outlets	5
Quality of national multiple outlets	5
Presence of evening economy	1

Source: NLP Site Visit (September 2012)

10.18 There are no specialist independent traders within both primary area which leads to the centre scoring poorly. However, the proportion of multiple retailers was rated as good due to the large number of multiple retailers who can be found at the centre and the general quality of those outlets is good with the all but two being established brands, such as B&Q and PC World.

10.19 There was very little presence of evening economy at the centre with only the fast food takeaway such as Burger King or KFC offering any form of evening economy.

Anti-Social Behaviour & Security

10.20 The shopping areas were also rated in relation to CCTV coverage, police presence, anti-social behaviour and street lighting during the NLP visit.

Performance Factor	Primary Area Score
Evidence of begging/on–street drinking	5
CCTV coverage/police presence	4
Frequency of street lighting	5

Source: NLP Site Visit (September 2012)

10.21 During NLP's visit to the centre there was no evidence of either on-street drinking or begging. CCTV coverage and police presence was rated as good throughout the centre. The frequency of street lights rated well in both the primary and secondary areas. Overall, during the day, Tottenham Hale appeared reasonably safe, with little evidence of anti-social behaviour.

Accessibility & Movement

10.22 Factors influencing accessibility and movement around the centre were considered, i.e. pedestrian/vehicular conflict, frequency of pedestrian crossings, bus stops and the location and convenience of car parks.

Performance Factor	Primary Area Score
Location and convenience of car parks	5
Pedestrian/vehicular conflict	2
Traffic congestion	2
Frequency of pedestrian crossings	2
Frequency of bus stops	4
Quality of bus stops/shelters	3

Source: NLP Site Visit (September 2012)

10.23 Movement in Tottenham Hale itself is very good with a high frequency of pedestrian crossings, low traffic congestion and a lack of pedestrian/vehicular conflict. However, the roads outside the Park which provide access to the Retail Park are extremely busy and lack pedestrian crossings. The Retail Park was therefore rated as poor in these categories. As Tottenham Hale is a purpose built Retail Park the car park is at the centre and surrounded by the retail units. This therefore provides easy and convenient parking for people visiting the Park. The provision of bus stops is reasonable.

Cleaning & Maintenance

10.24 NLP's analysis of cleanliness and maintenance within the Tottenham Hales primary and secondary areas were rated based on six separate factors.

Performance Factor	Primary Area Score
Litter and street cleaning	4
Chewing gum on paving	4
Evidence of fly-posting	5
Evidence of graffiti	5
Maintenance of paving/street materials	4
Quality of shop frontages/fascia	5

Source: NLP Site Visit (September 2012)

10.25 The cleanliness and maintenance of Tottenham Hale was ‘quite good’ overall. The primary area appeared clean in terms litter, chewing gum and evidence of fly-posting. There little evidence graffiti throughout the centre. The maintenance of street materials in the primary area was considered ‘quite good’. However, as soon as you leave the centre the maintenance level does fall. Generally the quality shop frontages and fascias were ‘very good’ within the centre.

Quality of Streetscape & Environment

10.26 The quality of the streetscape and general shopping environment in the primary area was assessed within Tottenham Hale based on 12 separate factors. However, it should be noted that this has been developed as a retail park and is therefore difficult to compare to the other districts within this category. The quality of the streetscape was rated as being of a poor standard within the primary shopping area, with the majority of factors rated as ‘poor’. The retail units within the centre are your standard retail park unit and are rated as ‘quite poor’.

Performance Factor	Primary Area Score
Quality of paving/street materials	4
Quality of street furniture (bins and chairs)	1
Quantity of street furniture (bins and chairs)	1
Quantity/quality of Public Art	1
Quality of street signage/maps	1
Quantity of street signage/maps	1
Quality of design of street lighting	4
Quality/attractiveness of commercial properties (inc. upper floors)	2
Quality of planting/trees	3
Quantity of planting/trees	3
Quantity/Quality of town centre parks/public open space	1
Street entertainment/events/ liveliness	1

Source: NLP Site Visit (September 2012)

10.27 Throughout the centre the quality of design of street lighting is ‘quite good’. There is no public open space in the centre with the nearest park being Down Lane Park to the north. The general liveliness of the centre was deemed relatively ‘very poor’ with very few on-street activities. There was no public art within Tottenham Hale.

Property Vacancies

10.28 There were no vacant or derelict units in the centre.

Performance Factor	Primary Area Score
Number of vacant units	5
Concentrations of vacant units	5
Derelict/long term vacant units	5

Source: NLP Site Visit (September 2012)

Summary

10.29 Overall the primary shopping area within Tottenham Hales is considered reasonable with the average score for the 35 factors totalling 3.08. Fourteen factors in the primary area were each given a rating of 'very poor' and 'quite poor'.

North West of the Centre looking south east–Primary Area

North East looking West–Primary Area

11.0 Tottenham High Road

11.1 In October 2011, NLP was appointed by London Borough of Haringey to prepare town centre health checks of the two designated district centres (Seven Sisters/West Green Road and Bruce Grove/Tottenham High Road) located along Tottenham High Road, as well as an audit of shops and services along the High Road.

11.2 Overall the key conclusions from this report were as follows:

a Tottenham High Road in its entirety serves a range of key roles for the eastern half of the London Borough of Haringey. The range of retailers and mix of uses highlight that it serves a day-to-day function providing shops and services for the local community;

b The area continues to have a limited range of either higher order retailers or national multiple retailers and there is some observational evidence that turnover rates among businesses are relatively high. However, the range of lower order, independent retailers is good;

c Vacancy rates are comparable with the national average, and do not indicate any substantial problems with the viability or market demand for retail properties in the area. Notwithstanding there are some clusters of vacant units particularly along West Green Road and derelict/cleared sites along Tottenham High Road near Bruce Grove;

d Bruce Grove/Tottenham High Road District Centre appears to have improved in perception, with both NLP's health check analysis and in-street visitor surveys suggesting overall perceptions of the District Centre are more positive than the same analysis in 2008;

e Conversely, Seven Sisters/West Green Road District Centre appears to have declined with both of these indicators suggesting overall perceptions of the District Centre are worse than the same analysis in 2008;

f Although the Summer 2011 riots have left a visible legacy with a number of vacant, derelict and cleared units, it does not appear to have appreciably impacted upon the perceived health, vitality and viability of the area, particularly in Bruce Grove/Tottenham High Road district centre where most of the rioting occurred;

g Indeed, the now vacant development plots provide an opportunity to further improve the role of the centres and the retail offer along Tottenham High Road by creating units which can accommodate both the previous tenants returning as well as potentially act as a catalyst to attract other higher quality retailers (either independents, small chains or national multiples) on longer leases;

h Other measures to help independent retailers, such as improved small business support for shop owners and/or shop improvement grants, may also help improve the vitality and viability of the area.

11.3 The overall direction of change for Tottenham High Road is mixed, with certain areas faring relatively well (e.g. Bruce Grove, Tottenham High Road North) whilst others appear to be in decline (e.g. Seven Sisters). Despite this, it remains the case that the whole area of Tottenham High Road would benefit hugely from regeneration and investment, along with the potential spin-off improvements and enhancements to the retail and community function of the area.

12.0 Local Shopping Provision

Introduction

12.1 The adopted Haringey UDP (July 2006) identifies 38 Local Centres within the borough. Using date provided by the Council, NLP has undertaken an assessment of local shopping provision based on a qualitative analysis of how well each local centres is serving a local shopping function and meeting local residents' needs.

Local Needs Index

12.2 Our analysis splits the local centres into: *large* (20 or more commercial units) or *small* (19 commercial units or less).

12.3 The key focus in auditing local centres has been in assessing the 'needs' of local residents and to what extent each centre is meeting these 'needs'/ There is no clear definition of need, but it is considered that residents in the densely population borough could expect to find some or all of the following shops and services within easy walking distance of their home.

- Food or convenience store suitable for top-up shopping;
- Bank;
- Post Office;
- Newsagent;
- Off licence;
- Takeaway, café or restaurant;
- Public house;
- Bookmakers;
- Launderette;
- Hairdressers; and
- Chemist.

12.4 Each local centre has therefore been allocated a score out of 11, based on the number of local shops and service that it provides. For example, Lordship Lane Roundway and Turnpike Lane Local Centres provide ten of the eleven identified key shops and services, scoring 10 on the local needs index, which would suggest the local residents of these two areas are relatively well served by their local shopping centre. By contrast, Cranley Parade only scored 1 on the local needs index and Midhurst Parade and Quernmore Road only attract a score of 2, which would suggest a very limited level of local needs are being met. In addition to this it is important to consider the ability of a local important parade in meeting top-up shopping needs. Therefore, the number of convenience stores with the ability to provide local top-up shopping (e.g. grocers, local corner shop or small supermarket) in the parade is also considered.

12.5 Clearly the local needs index is not a precise measure of whether a local shopping centre is meeting the needs of local residents, as there are many other factors to consider:

- First, the relative size of an important local parade will dictate the range of shops and service each centre can offer.
- Second, the close proximity of other town centres, local centres and 'stand alone' shops means that local need may be met at an alternative location within walking distance and local needs are therefore still being met.
- Third, the quality of the shopping centre or parade, in terms of its environment, type and range of retailers will effect how it is perceived and used by local residents.
- Fourth, the relative accessibility of each centre will be an important factor in how local people use the local shops and services. For example, the major traffic route, which is difficult for pedestrians to cross, may influence shopping patterns in the area.

12.6 However, it is considered that the local need index provides a useful indicator of whether a local centre is meeting some or all needs of local residents.

Local Needs Index Summary

12.7 Table 12.1 provides a summary of local centres within the borough. The local shopping centres vary significantly in size, from only 3 commercial retail units (Craven Park Road) to as large as 107 (Archway Road). The key points are:

- 17 local centres are classified as small; and
- 21 local centres are classified as large.

12.8 The majority of the large sized local centres are meeting most key local needs. Based on the local needs index, 14 of the 21 large sized centres in the borough are meeting 8 or more of the identified local needs. Three of the large sized centres are meeting 7 of the identified local needs and two of the large sized centres are meeting 6 of the identified local needs. However, two of the large sized centres are only meeting 5 or less of the identified local needs criteria (Aylmer Parade and Tottenham Lane East). Aylmer Parade is the worst performing large sized local centres as it only scored 4 on the local needs index. However, this is a relatively 'small' large sized local centre with only 20 commercial retail units (i.e. just falls within the large centre category). In general, the large sized local centres provide a good local shopping offer for local residents, although in comparison to NLP's survey of the centres in 2008 the centres are not providing for as many of the identified local needs (in 2008, the lowest score on the local needs index was 6 for the large sized centres).

Table 12.1 Local Needs Index Summary

Local Centre Name	Size of Centre	Total No. of Units	Local Needs Index	No. of Convenience Stores	No. of Vacant Units	No. of Class A2 Units (Betting Shops)
Alexandra Park Road	Large	27	**8**	6	2 (7.4%)	3 (0)
Archway Road	Large	107	**9**	11	23 (21.5%)	7 (0)
Aylmer Parade	Large	20	**4**	2	2 (10.0%)	3 (0)
Bounds Green	Large	25	**7**	7	1 (4.0%)	4 (1)
Broad Lane	Large	23	**8**	3	3 (13.0%0	4 (1)
Commerce Road	Small	9	**7**	5	0 (0.0%)	0 (0)
Cranley Parade	Small	5	**1**	1	2 (40.0%)	0 (0)
Craven Park Road	Small	4	**3**	2	1 (25.0%)	0 (0)
Crescent Road	Large	26	**6**	3	4 (15.4%)	5 (0)
Ferme Park Road	Small	12	**7**	1	2 (16.7%)	1 (0)
Great Cambridge	Large	28	**9**	4	6 (21.4%)	2 (1)
Green Lanes	Small	10	**4**	2	3 (30.0%)	1 (0)
Hermitage Road	Small	4	**3**	2	0 (0.0%)	0 (0)
Highgate High Street	Large	32	**8**	5	0 (0.0%)	5 (0)
Hornsey High Street	Large	76	**9**	7	6 (7.9%)	6 (1)
Lordship Lane Central	Small	12	**4**	4	3 (25.0%)	0 (0)
Lordship Lane East	Small	13	**5**	5	0 (0.0%)	0 (0)
Lordship Lane Roundway	Large	79	**10**	11	9 (11.4%)	9 (3)
Lordship Lane West	Large	29	**8**	9	4 (13.8%)	2 (2)
Midhurst Parade	Small	5	**2**	2	0 (0.0%)	0 (0)
Myddleton Road	Large	65	**6**	4	23 (35.4%)	10 (1)
Park Lane	Small	19	**8**	6	5 (26.3%)	1 (0)
Park Road/Priory Road	Large	24	**8**	5	1 (4.2%)	2 (1)
Philip Lane East	Small	18	**6**	2	2 (11.1%)	1 (1)
Philip Lane West	Large	23	**8**	3	2 (8.7%)	1 (1)
Quernmore Road	Small	10	**2**	1	6 (60.0%)	0 (0)
Seven Sisters Road	Large	34	**9**	8	4 (11.8%)	2 (1)
Stroud Green Road North	Small	14	**4**	1	2 (14.3%)	1 (0)
Stroud Green Road South	Small	15	**4**	1	1 (6.7%)	3 (0)

Local Centre Name	Size of Centre	Total No. of Units	Local Needs Index	No. of Convenience Stores	No. of Vacant Units	No. of Class A2 Units (Betting Shops)
Tottenham High Road North (Northumberland Park)*	Large	30	**7**	2	3 (10.0%)	3 (1)
Tottenham Lane East	Large	40	**5**	3	9 (22.5%)	5 (1)
Tottenham Lane West	Small	15	**5**	3	0 (0.0%)	3 (0)
Turnpike Lane	Large	85	**10**	21	12 (14.1)	8 (1)
West Green Road Central	Large	27	**9**	5	1 (3.7%)	1 (1)
West Green Road West	Large	35	**7**	3	17 (48.6%)	3 (0)
Westbury Avenue	Large	20	**8**	5	2 (10.0%)	2 (1)
Weston Park	Small	11	**5**	3	0 (0.0%)	1 (0)
Wood Green High Road North	Small	11	**6**	3	1 (9.1%)	1 (0)

Notes: Centre ranking based upon the number of identified 'key' retail/service unit types found in each centre, (highest 11, lowest 0).

Size of centre based on number of commercial retail units (A1, A2, A3, A4, A5, SG & Vacant).

Convenience stores includes all convenience retailers able to provide for top-up shopping, such as grocers, mini/supermarkets and local corner shop type retailers (butchers, bakers, newsagents and off licences whilst convenience stores, generally do not cover top-up shopping requirements).

Where a shop meets more than one 'key' identified need (e.g. a grocers with an off licence section) it may only score in one category of the index (e.g. as a top-up convenience store or as an off licence). This assumption is made to ensure a range and choice of retailers/services in meeting local needs.

Data based upon Haringey Council Local Shopping Centre Audits (2012)

** Not surveyed. Based on 2008 NLP survey data.*

Non retail/service units within the parades have been excluded (e.g. B1 Office, C3 Residential, D1, D2).

12.9 Of the 17 small local centres within the borough there is a wide range of scores on the local needs index. Park Lane meets 8 of the local needs (NLP's 2008 survey identified that Park Lane met 9 of the identified local needs) and both Commerce Road and Ferme Park Road score 7. In contrast, Cranley Parade (NLP's 2008 survey identified that Cranley Parade met 2 of the identified local needs) only scored 1 on the local needs index and both Midhurst Parade and Quernmore Road only 2. Two of the small sized local centres scored 3, four scored 4, three scored 5 and two scored 6 on the local needs index. In general, some of the small sized local centres have fallen slightly on the local needs index since NLP's survey in 2008.

12.10 All of the local centres were identified has having at least one convenience store for top-up shopping. 13 of the local centres had a vacancy rate of 15% or greater, which is higher than the national average of 13.7%. Quernmore Road and West Green Road West had particularly high vacancy rates of 60% and 50% respectively.

The Need for New Local Centres

12.11 Plan 2 in Appendix 11 shows the areas of the borough that are beyond 400 metres of a Metropolitan, District or Local Centre. As per NLP's 2008 Study, there are only a few built up residential areas without provision within 400 metres and these are spread throughout the borough. It may be appropriate to consider whether additional local provision is required in some of these areas to address areas of deficiency, albeit some of the areas without provision are close to the borough boundary and may be catered for by designated centres in neighbouring boroughs. Provision within mixed use developments could be considered.

12.12 A number of local centres have increased vacancy levels compared to those recorded in NLP's 2008 Study, notably Cranley Parade (vacancy levels have increased by 40%, 2 out of 5 units), Green Lanes Parade (vacancy levels have increased by 30%, 3 out of 10 units) and West Green Road West (vacancy levels have increased by 29.3%, 17 out of 34 units). The local centres with the highest vacancy levels are Quernmore Road and West Green Road West with 60% and 50% of units vacant respectively. It may be appropriate to monitor these local centres and implement improvement measures, as necessary, to encourage the take up of vacant units to improve the vitality and viability of these local centres or review the boundaries of these centres.

12.13 Myddelton Road and Park Lane should also be monitored closely and their designation/boundary reviewed as their vacancy levels have increased when compared to those recorded by NLP's 2008 Study (increased by 16.6% and 21.1% respectively).

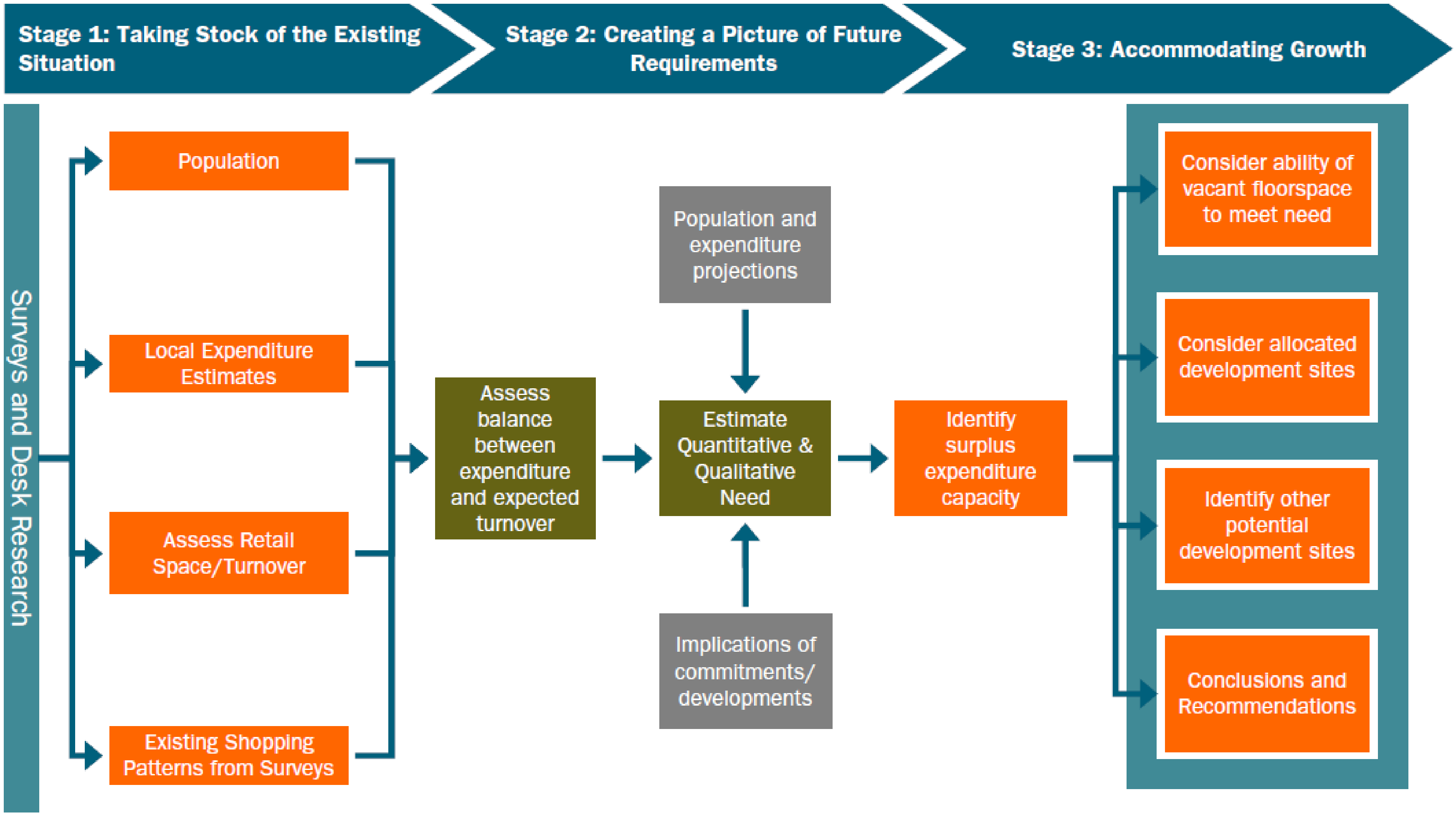
13.0 Assessment of Retail Needs

Introduction

13.1 This section assesses the quantitative and qualitative scope for new retail floorspace in the London Borough of Haringey during the period from 2012 to 2031. It 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. A qualitative assessment of the range and scale of existing shopping facilities has been undertaken.

13.2 The quantitative analysis is based on a defined Study Area that covers the catchment areas of the main shopping destinations in the borough. The Study Area is sub-divided into 8 zones as shown in Appendix 1. The survey zones take into consideration the extent of the catchment area of the main centres in the borough. A list of postal sectors within each zone in shown in Appendix 1 along with the details methodology which is summarised in Figure 13.1 below.

Figure 13.1 Methodology for Estimating Future Requirements for Retail Floorspace



Retail Trends

13.3 It is important to consider changes in the retail sector nationally and the implications for LB Haringey.

13.4 The economic downturn is still having a significant impact on the sector. A number of national operators have failed (e.g. JJB Sports, Clinton Cards, Woolworths, MFI, Land of Leather, Borders, Game, Firetrap, Peacocks, La Senza, Past Times, Barratts, Comet and Habitat), leaving major voids within centres and retail parks. Many town centre development schemes have been delayed and the demand for traditional retail warehouse operators has also been affected. Even some of the main food store operators have seen a reduction in growth.

13.5 Assessing future expenditure levels within this study needs to take into account the economic downturn, particularly in the short term. Careful consideration is needed to establish the appropriate level of expenditure growth to be adopted over the LDF period. This study takes a long term view for the LDF period recognising the cyclical nature of expenditure growth. Trends in population growth, home shopping/internet sales and growth in turnover efficiency also need to be carefully considered and a balanced approach taken.

13.6 An overview of national tends within the retail sector is set out below.

Expenditure Growth

13.7 Historic retail trends indicate that expenditure has consistently grown in real terms in the past, generally following a cyclical growth trend. The underlying trend shows consistent growth and this trend is expected to continue in the future. However, the current economic downturn is expected to lead to limited growth in the short term.

13.8 In the past, expenditure growth has fuelled growth in retail floorspace, including major out-of-centre development, particularly in the 1980s and 1990s. The economic downturn suggests that rates of growth during the past few years are unlikely to be achieved in the short term, but the underlying trend over the medium and long terms is expected to lead to a need for further retail floorspace. These national trends are anticipated to be mirrored in London.

New Forms of Retailing

13.1 New forms of retailing have emerged in recent years as an alternative to more traditional shopping facilities. Home/electronic shopping has also emerged with the increasing growth in the use of personal computers and the internet. Trends within this sector may well have implications for retailing within LB Haringey. Growth in home computing, internet connections and interactive TV may lead to a growth in home shopping and may have effects on retailing in the high street and in Haringey.

13.2 On-line shopping has experienced rapid growth since the late 1990s but in proportional terms the latest available data suggests it remains an insignificant percentage of total retail expenditure. Recent trends suggest continued strong growth in this sector, from 4.7% of retail transactions in June 2008 to near 9% in 2012[1], but there is still uncertainty about its longer-term prospects and the potential effects on the high street. Experian's Retail Planning Note 10 states:

"The strong increase in online shopping in the past decade has lifted the share of special forms of trading (SFT) to a level where it now accounts for around a tenth of total retail sales.

The rising share of internet sales in total retail transactions dominates the picture of SFT. Internet sales' share of total retail sales stood at near 9% in 2012 against 4.7% in June 2008 and just 2.9% as recently as March 2007.

Non-store retailing continues to grow rapidly, despite the tough retail environment. We retain our assumption that nonstore retailing will increase at a faster pace than total retail sales well into the medium term. It is estimated that 85% of the UK adult population were internet users at the end of 2011, so growth of the internet user base will be less of a driver than in the past decade. But growth momentum will be sustained as new technology such as browsing and purchasing through mobile phones and the development of interactive TV shopping boost internet retailing. We now expect that the SFT market share will continue to increase over the forecast period, although the pace of e-commerce growth will moderate markedly after about 2020. Our new forecast has the SFT share of total retail sales reaching 17.4% by 2020 (15.4% in Retail Planner Briefing Note 9 of September 2011), rising to 20% by the end of the 2020s (15.5% previously)."

13.3 This Study makes an allowance for future growth in e-tailing based on Experian projections. It will be necessary to monitor the amount of sales attributed to home shopping in the future in order to review future policies and development allocations.

13.4 The implications on the demand for retail space are unclear. For example, some retailers operate on-line sales from their traditional retail premises e.g. food store operators, therefore growth in on-line sales may not always mean there is a reduction in the need for retail floorspace. Given the uncertainties relating to internet shopping and the likelihood that it will increase in proportional terms, this assessment has adopted relatively cautious growth projections for retail expenditure.

13.5 In addition to new forms of retailing, retail operators have responded to changes in customers' requirements. For example, extended opening hours and Sunday trading increased significantly in the 1990s. Retailers also responded to stricter planning controls by changing their trading formats to include smaller store formats capable of being accommodated within town centres (such as the

[1] Retail Planner Briefing Note 10 (September 2012), Experian

Tesco Metro, Sainsbury Central/Local store and Marks and Spencer's Simply Foods formats). The main food store operators have also increasingly sought representation in small towns in predominantly rural areas. The expansion of European discount food operators Aldi and Lidl has also been rapid during the last decade.

13.6 Food store operators have also had a recent programme of store extensions, particularly Tesco, Sainsbury and Asda. These operators, faced with limited growth in food expenditure, have often increased the sale of non-food products within their food stores, including clothing and electrical goods. The recent recession has though first halted this trend, and is now reversing it.

13.7 Comparison retailers have also responded to market conditions. The bulky goods warehouse sector has rationalised, including a number of mergers and failures, and scaled down store sizes. Other traditional high street retailers often seek large out-of-centre stores, for example Boots, TK Maxx and Poundstretcher. Matalan has also opened numerous discount clothing stores across Great Britain. Sports clothing retail warehouses including Decathlon have also expanded out-of-centre.

13.8 Within town centres, many high street multiple comparison retailers have changed their format. High street national multiples have increasingly sought larger modern shop units (over 200 sq m) with an increasing polarisation of activity into the larger regional and sub-regional centres.

13.9 The economic downturn has had, and is likely to continue to have, an impact on the retail sector. The effects of the recession may continue to have an impact on shop vacancy levels in the borough. The demand for premises within the bulky goods sector, i.e. furniture, carpets, electrical and DIY goods, is particularly weak at present, and high land values in London may make this form of low density development unviable.

13.10 The continuation of these trends will influence future operator requirements in the borough of Haringey with smaller vacant units becoming less attractive for new occupiers and existing retailers looking to relocate into larger units in higher order centres.

13.11 Operator demand for space has decreased during the recession and, of those national multiples looking for space many prefer to locate in larger centres and the West End. Demand from multiples within Haringey's centres is likely to be weaker, which will affect the appropriate strategies for individual centres.

Population and Expenditure

13.12 The Study Area population for 2012 to 2031 is set out in Table 1 in Appendix 3. Population estimates for borough of Haringey have been projected forward to 2031 using the GLA's ward level projections (2011 standard fertility figures). Population within the Study Area is expected to increase between 2012 and 2031 by 11.8% (49,000 people).

13.13 Table 2 in Appendix 3 sets out the forecast growth in spending per head for convenience goods within each zone in the Study Area up to 2031. Forecasts of comparison goods spending per capita are shown in Table 1 in Appendix 4.

13.14 As a consequence of growth in population and per capita spending, convenience goods spending within the Study Area is forecast to increase by 22.2% from £830.51 million in 2012 to £1,014.77 million in 2031, as shown in Table 3 (Appendix 3).

13.15 Comparison goods spending is forecast to increase by 74.7% between 2012 and 2031, increasing from £1,248.08 million in 2012 to £2,180.10 million in 2031, as shown in Table 2 (Appendix 4).

13.16 These figures relate to real growth and exclude inflation.

Existing Retail Floorspace 2012

13.17 Existing convenience goods retail sales floorspace within the borough of Haringey is 54,926 sq.m net, as set out in Table 1, Appendix 2.

13.18 Comparison goods retail sales floorspace within the borough is estimated as 101,403 sq.m net, as shown in Table 2, Appendix 2.

Existing Spending Patterns 2012

13.19 The results of the household shopper questionnaire survey undertaken by NEMS in September 2012 have been used to estimate existing shopping patterns within the Study Area. The results can be found in Appendix 6.

13.20 For the purposes of our analysis, the borough has been split into four areas, as follows:

- Wood Green/Green Lanes
- Muswell Hill/Crouch End
- Bruce Grove/Tottenham High Road/West Green Road/Seven Sisters Road/Tottenham Hale Retail Park
- Local Centres

13.21 It is clear that respondents do not always refer to areas by their development plan names, particularly Bruce Grove and Seven Sisters/West Green Road and may often visit more than one centre and refer to the area as 'Tottenham'. For the purposes of our analysis, it is therefore more appropriate to combine these areas.

Convenience Shopping

13.22 The results of the household shopper survey have been used to estimate existing convenience goods shopping patterns. The estimates of market share or penetration within each Study Area zone are shown in Table 4, Appendix 3.

13.23 Table 4 indicates that the majority of residents within zones 1, 2, 3 and 7 carry out their convenience retail shopping within the borough (ranging from 53%% in

Zone 2 to 76% in Zone 1). Whilst in Zone 4 & 5 less than a third of residents carry out their convenience retail shopping within the borough (30% and 21% respectively).

13.24 The level of convenience goods expenditure attracted to shops/stores in Haringey in 2012 is estimated to be £444.63 million as shown in Table 5, Appendix 3. This includes estimates of inflow from beyond the Study Area, applying the market shares identified in Table 4, Appendix 3.

13.25 The total benchmark turnover of the existing convenience sales floorspace within the borough is £402.82 million at 2012 (Table 1, Appendix 2). The actual turnover of the convenience floorspace at facilities within the borough is £444.63 million (Table 5, Appendix 3). These figures suggest that collectively convenience retail facilities within the borough are trading about 10% above the national average, i.e. £41.81 million above average. This suggests that there is currently a quantitative under-supply of convenience goods floorspace in the borough.

Comparison Shopping

13.26 The estimated comparison goods expenditure currently attracted by shopping facilities within the borough is £549.49 million in 2012, as shown in Table 3, Appendix 4. This includes estimates of inflow from beyond the Study Area.

13.27 Between 40% and 60% of expenditure is retained within the borough in zones 1, 6, 7 and 8. Expenditure retained in zones 2 to 5 is relatively low, particularly zones 4 and 5 (13% and 20% respectively).

13.28 Overall the comparison expenditure retention levels are lower when compared with the convenience goods market shares. This reflects the influence of higher order centres outside the borough, in particular the West End and Brent Cross.

13.29 Based on the estimate of comparison goods expenditure attracted to facilities within the borough, the average sales density for existing comparison sales floorspace (101,403 sq m net) is £5,420 per sq m net. The analysis of existing comparison shopping patterns in 2012 suggests the following average sales density figures for the main centres in the borough as shown in Table 13.1.

Table 13.1 Defined Centres Comparison Average Sales Densities

Centre	Average Sales Density 2012 (£ per sq m net)
Wood Green/Green Lanes	£5,265
Muswell Hill/Crouch End	£7,237
Bruce Grove/Tottenham High Rd/West Green Rd/Seven Sisters Rd/Tottenham Hale RP*	£5,430
Local Centres	£2,368
Borough Average	**£5,420**

13.30 Table 13.1 indicates that comparison sales floorspace is trading healthily in the main centres and that local centres are trading less healthily. Household survey results will tend to over-estimate the importance of the main centres and conversely under-estimate the importance of local centres.

Quantitative Capacity for Convenience Goods Floorspace

13.31 The level of available convenience goods expenditure in 2012, 2017, 2022, 2027 and 2031 is shown at Tables 5, 7 to 10, in Appendix 3. The figures for 2017 onwards have been adjusted to take account of major food store developments proposed as follows:

- Sainsbury's at Northumberland Park
- Aldi, High Road, Tottenham

13.32 The total level of convenience goods expenditure available for shops in the borough between 2012 and 2031 is summarised in Table 11 (Appendix 3). Convenience expenditure available to shopping facilities in the District is expected to increase from £444.63 million in 2012 to £571.36 million in 2031.

13.33 Table 11 (Appendix 3) subtracts the benchmark turnover of existing and proposed floorspace from available expenditure to calculate the amount of surplus expenditure that may be available for further new development. Within the borough as a whole, there is a surplus of £41.80 million convenience goods expenditure in 2012. In 2017 this surplus will reduce to £38.50 million due to the implementation of proposed foodstore commitments as listed above. By 2027, future expenditure growth generates an expenditure surplus of £91.99 million increasing to £115.07 million in 2031.

13.34 The surplus expenditure projections have been converted into potential new floorspace estimates at the foot of Table 11 (Appendix 3). Surplus expenditure is converted into floorspace estimates based on average sales density figure for existing floorspace (£8,269 per sq m).

13.35 Available surplus expenditure up to 2017 indicates that in the short term surplus expenditure could support up to 3,725 sq m net of sales floorspace in the borough as a whole, over and above commitments. The projection at 2029 is 11,133 sq m net. The breakdown is shown in Table 13.2.

Table 13.2 Convenience Goods Floorspace Projections

Centre	2017	2022	2027	2031
	sq m net	sq m net	sq m net	sq m net
Central Haringey (Wood Green/Green Lanes)	900	1,875	2,960	3,882
West Haringey (Crouch End/Muswell Hill)	6,019	6,626	7,499	8,723
East Haringey (Bruce Grove/Tottenham High Rd/West Green Rd/Seven Sisters	-3,193	-2,394	-1,599	-1,022
Borough Total	**3,725**	**6,108**	**8,900**	**11,133**

Source: Table 11, Appendix 3

13.36 The floorspace projections for the borough at 2022 (over and above commitments is 6,108 sq m net. These figures suggest the priority for foodstore development within the borough is the West Haringey area (Muswell Hill and Crouch End). The proposed foodstore developments in East Haringey are expected to result in a deficit of expenditure up to 2031.

13.37 Even allowing for proposed food store developments at Tottenham the convenience goods floorspace projections are high, because they assume a reduction in the turnover of existing floorspace down to national average levels (assumes existing foodstores are trading at the national company average).

13.38 Property cost and other overheads are generally higher in London and it is unrealistic to assume that on average all convenience goods floorspace in the Borough will trade at national average levels. It is also possible food and grocery prices are higher than the national average within convenience shops in London, which would imply a higher benchmark turnover would be appropriate.

Quantitative Capacity for Comparison Goods Floorspace

13.39 The household survey suggests that the borough's retention of comparison goods expenditure is lower than for convenience goods. The lower level of comparison expenditure retention is due to the strength of competing comparison goods facilities in neighbouring authorities, in particular Central London and Brent Cross.

13.40 Future improvements to comparison retail provision within the borough could help to claw back some additional expenditure leakage from the Study Area. However major developments in neighbouring authorities will limit the ability of shopping facilities in the borough to increase their market share of expenditure such as the development at Kings Cross and the Brent Cross extension.

13.41 An appropriate strategy for Haringey should be to seek to maintain existing market shares as a minimum, with sustainable increases in market share achieved by development within the Northumberland Park area. The retail capacity projections in Appendix 4 are based on this approach and therefore

Haringey should seek to provide the level of floorspace identified to maintain existing market shares. In order to maintain market share new investment and development will need to be delivered.

13.42 Available comparison goods expenditure at 2012 is based on 2012 penetration rates (current market share) in Table 3. Growth up to 2017, 2022, 2027 and 2031 is shown in Tables 4-7 in Appendix 4. These projections are based on adjusted market shares which take into account the proposed comparison element of the Sainsbury's at Northumberland Park.

13.43 Future available expenditure is compared with the projected turnover of existing comparison retail in Table 8 (Appendix 4). Table 8 assumes that the turnover of existing comparison floorspace will increase in the future. An average growth rate of 1.8% per annum is adopted, in line with figures provided by Experian.

13.44 Trends indicate that comparison retailers historically will achieve some growth in trading efficiency. This is a function of spending growing at faster rates than new floorspace provision and retailers' ability to absorb real increases in their costs by increasing their turnover to floorspace ratio.

13.45 Within the borough, allowing for the implementation of commitments and the growth in turnover efficiency, creates an expenditure surplus at 2017 of £29.22 million). By 2022, future expenditure growth generates an expenditure surplus of £69.78 million, increasing to 137.76 million in 2027 and £199.64 million in 2031.

13.46 Surplus comparison expenditure has been converted into net comparison sales floorspace projections at the foot of in Table 8 in Appendix 4, using the average sales density of existing floorspace of £5,420 per sq m in 2012, which is expected to grow by 1.8% per annum. The surplus expenditure at 2017 could support 4,931 sq m net of sales floorspace (6,575 sq m gross), increasing to 10,771sq m net (14,362 sq m gross) by 2022, 19,449 sq m net in 2027 and 26,245 sq m net in 2029. The floorspace projections are broken down below.

Table 13.3 Comparison Goods Floorspace Projections

Centre	2017	2022	2027	2031
	sq m net	sq m net	sq m net	sq m net
Central Haringey (Wood Green/Green Lanes)	2,465	5,360	9,599	12,900
West Haringey (Crouch End/Muswell Hill)	888	1,769	3,472	4,917
East Haringey (Bruce Grove/Tottenham High Rd/West Green Rd/Seven Sisters	1,367	3,208	5,661	7,497
Other/Local Shops	211	435	717	931
Borough Total	**4,931**	**10,771**	**19,449**	**26,245**

Source: Table 8, Appendix 4

Qualitative Need for Retail Floorspace

13.47 Qualitative need can be assessed through consideration of the following factors:

- deficiencies or ‘gaps’ in existing provision;
- consumer choice and competition;
- overtrading, congestion and overcrowding of existing stores;
- location specific needs such as deprived areas and underserved markets; and
- the quality of existing provision.

Convenience Goods Shopping

13.48 The household survey results indicate that most residents in the Study Area undertake both a main shopping trip and top-up shopping trips. Main shopping trips are generally made once a week or less often, and the household survey identified that 49.3% of respondents travel to do their main food shopping by car (both driver and passenger) compared with 43.3% for non-food shopping. The availability of a wide range of products and free car parking are important requirements for bulk food shopping trips. Large supermarkets or superstores are the usual destination for these types of shopping trip.

13.49 There are three food superstores (over 2,500 sq.m net) within the borough, ie. Morrisons, Wood Green; Sainsbury’s, Arena Retail Park, Green Lanes, and Tesco, West Green Rd/Seven Sisters District Centre. In addition, planning permission has been granted for a Sainsbury’s foodstore of approx 7,400 sq m net at Northumberland Park and there are food superstores just outside the borough boundary including the Tesco store at the Coppetts Centre and Asda at Edmonton Green.

13.50 The larger food stores are supported by a good range of smaller supermarkets and convenience stores including 9 Tesco Express stores, 5 Sainsbury’s Local stores and 2 Little Waitrose stores. The discount food sector is represented by Lidl on Tottenham Hale Retail Park and in Wood Green. Further to this, there is planning permission for a replacement Aldi store on the High Road in Tottenham.

13.51 The retail capacity projections set out in Table 11 in Appendix 3 suggest the highest convenience goods expenditure surplus in 2012 relates to West Haringey (Crouch End/Muswell Hill). Crouch End and Muswell Hill are the main areas of quantitative deficiency in terms of large food store provision. The capacity figures and qualitative analysis suggest that the priority for future food store development over and above commitments should focus on the West Haringey area.

High Street Comparison Shopping

13.52 Wood Green is the main high street comparison shopping destination and the highest ranking centre within the borough. This is followed by Green Lanes and then Muswell Hill and Crouch End which are similar in terms of the number of comparison shops and amount of retail floorspace. Bruce Grove/Tottenham High Road and West Green Road/Seven Sisters Road District Centres are much smaller in terms of the amount of comparison retail floorspace. The borough also has one retail park, Tottenham Hale Retail Park which is a main destination in terms of comparison shopping offer but does not currently fulfil a district centre role as it does not provide a full range of facilities and services. Further details on this can be found in Section 14.0.

13.53 These shopping destinations provide a good range of comparison shops, including many national multiples and independent specialists. There is limited comparison provision in the north of the borough, however, residents have good access to comparison shopping facilities in neighbouring boroughs i.e. Enfield and Barnet. The household survey indicates that households in the northern part of the Study Area (Zones 5 and 8) mainly undertake their non-food shopping outside the borough in Enfield, Edmonton and Brent Cross.

13.54 Further to this, centres within the borough do not provide the same range and choice of comparison shopping facilities when compared with higher order shopping centres e.g. the West End and Brent Cross. Many residents with the borough are likely to continue to shop outside the borough.

Bulky Goods Retail Warehouses

13.55 The main retail warehouse representation is at Tottenham Hale Retail Park, with representation from a number of major national multiple retailers that are usually found in retail warehouse parks, including Currys, Carpetright and PC World. The retail park also has a selection of traditionally high street stores including Argos, Asda Living, Boots, Next and mobile phone shops.

13.56 There are also several retail warehouses within Arena Park within Green Lanes District Centre including Sports Direct, Homebase, Superdrug, Next and Poundland.

13.57 Residents within the borough also have reasonably good access to retail warehouses in Enfield (Colosseum Retail Park, De Mandeville Retail Park and Enfield Retail Park), Edmonton (Eleys Retail Park and Ravenside Retail Park), Chingford (Cork Tree Way Retail Park) and Barnet (Friern Bridge Retail Park).

13.58 The bulky goods retail warehouse sector has suffered during the recession and growth has been limited in recent years. London boroughs continue to have a limited number of retail warehouses, due to high land values and the poor availability of large sites.

Local Shops and Services

13.59 As shown in Section 11 and on Plan 2 in Appendix 11, the existing provision of local centres within the borough offers a reasonably balanced distribution of local facilities serving local communities. These facilities complement the six main centres and have an important role in serving the day-to-day needs in their local areas. There are small areas of residential development which may be deficient in local shopping centre provision throughout the borough but some of these may be catered for by facilities outside the borough.

13.60 The network of local centres should be maintained to ensure that residents have easy access to local shops and services. There may be scope for improving some local centres, and providing more local shopping provision in the areas where residents do not have local facilities within a 400 metre radius. Improvements would help to secure their viability but would only meet a small element of the scope for new retail development.

14.0 # Strategy for Accommodating Growth

Floorspace Projections

14.1 There are a number of issues that may influence the scope for new floorspace and the appropriate location for this development, as follows:

- major retail developments in competing centres;
- the re-occupation of vacant retail floorspace;
- the availability of land to accommodate new development;
- the reliability of long term expenditure projections, particularly after 2022;
- the effect of Internet/home shopping on the demand for retail property;
- the level of operator demand for floorspace in the borough of Haringey;
- the likelihood that Haringey's existing market share of expenditure will change in the future in the face of increasing competition;
- the potential impact new development may have on existing centres.

14.2 Projections up to 2017 are realistic and are based on up to date forecasts, which take into account the effects of the recession. The long term floorspace projections (up to 2022, 2027 and 2032) should be treated with caution and should only be used as a broad guide, particularly when translated into the development plan allocations or when used to guide development management decisions. Long term forecasts may be subject to change due to unforeseen circumstances. Long term projections should be monitored and kept under-review.

14.3 The expenditure projections in this study take into account home shopping made through non-retail businesses, because special forms of trading have been excluded. The study assumes that special forms of trading will increase in the future, including the growth of internet shopping.

14.4 The quantitative and qualitative assessment of the potential capacity for new retail floorspace suggests that there is scope for new retail development within the borough. This section examines the opportunities for accommodating this projected growth and assesses potential to accommodate this floorspace.

Accommodating Future Growth

14.5 The sequential approach suggests that town centres should be the first choice for retail and leisure development. The preferred location for development needs to be carefully considered, particularly for major development which may have an extensive catchment area.

14.6 The existing stock of premises may have a role to play in accommodating projected growth. The retail capacity analysis in this report assumes that existing retail floorspace can, on average, increase its turnover to sales floorspace densities. The floorspace projections reflect these assumptions. In addition to the growth in sales densities, vacant shops could help to accommodate future growth.

14.7 Vacant units could also help to accommodate growth. The strategy should seek to reduce shop vacancy levels across the borough, and we believe it is realistic to assume reoccupied units can accommodate approximately 8,500 sq m gross of commercial space.

14.8 Vacant units and growth in sales densities will not be able to accommodate all the future growth in retail expenditure, therefore potential development sites need to be identified through the development plan process to accommodate growth in the medium to long term.

Potential Retail Development Opportunities

14.9 We have identified and assessed potential sites that could accommodate additional retail development in the borough. We have considered sites that have been put forward by the Council and those identified through our own inspection of the centres.

14.10 Our site visit to each of the centres identified very few potential retail development opportunities. This is primarily due to the fact that most of the centres are bound very tightly with residential areas and therefore there are limited, or in most cases, no potential redevelopment sites in or on the edge of the centres. In addition, none of the centres had clusters of vacant units which could be combined to create a potential retail development opportunity. The key potential retail development opportunities that have been identified are in Crouch End and Wood Green. No development opportunities were identified in Green Lanes or Muswell Hill.

Crouch End

14.11 Adjacent to the north eastern boundary of Crouch End District Centre is a site which is currently occupied by Roseberry House, T's Bubbles Car Wash and M E B Motor Centre comprising around ground floor area of 1,270 sqm. While the site is still in active use, the buildings appear to be in need of refurbishment and the site is well located, adjacent to the District centre boundary, to provide new retail/leisure floorspace.

14.12 The location of this site next to the secondary shopping frontage make it appropriate for retail or leisure uses (such as a cinema, restaurants, gym etc.) or a mixed use development incorporating residential units. Although the centre has a gym, there is potential to provide further leisure uses to enhance the vitality and viability of the centre and complement the existing retail facilities.

14.13 This site is therefore considered to be a potential development opportunity in Crouch End for the provision of retail or leisure uses. The delivery of the site is dependent on the availability of the existing buildings/site for redevelopment.

Wood Green

14.14 The existing Library and Shopping Arcade in the northern part of the Wood Green Metropolitan Centre comprise a ground floor area of approximately, 2,730 sqm and is currently in use as a shopping arcade including a post office and Wood Green library. This site occupies a key location in the secondary shopping frontage adjacent to the end of the primary frontage and next to Wood Green Shopping City. The site currently provides a number of key services such as a Post Office and Library, however, the buildings are dated and in poor condition and do not provide an attractive frontage onto High Road.

14.15 This site represents an opportunity for intensification/improvement to provide modern retail facilities that better relate to the High Road. There is an opportunity to improve the public space area in front of the site so that this part of the secondary frontage integrates better with the nearby primary frontage.

Tottenham Hale

14.16 Our analysis did not identify any potential sites that could provide additional retail development at Tottenham Hale Retail Park, if the current level of car parking is to be maintained.

14.17 However, there may be scope to identify sites/intensify the existing retail provision on the Park as a result of the proposed changes to Tottenham Hale linked to the Council's long term regeneration plans for the wider area. Sites are likely be identified through the proposed Area Action Plan for Tottenham Hale and the emerging Site Allocations Document.

14.18 There may also be opportunities to expand retail provision onto neighbouring sites, depending on the mix and scale of retail development envisaged as part of the proposals for the wider opportunity area.

15.0 Conclusions & Recommendations

Meeting Shopping Needs in the LB Haringey

15.1 In order to meet projected growth in expenditure, there is a need for additional shopping and service facilities. Future planning policy and site allocations should seek to identify opportunities to accommodate growth.

15.2 The floorspace projections shown in this report provide broad guidance and should be used as an indicator when assessing major retail proposals. Applicants proposing main town centre uses should base their supporting impact assessment on the approach adopted in this study, updated as necessary.

15.3 The floorspace projections in this report should not be considered to be maximum or minimum limits or targets, particularly when used to guide development management decisions. However, the projections provide a broad quantum of floorspace likely to be required and the potential phasing of development, which will assist in identifying development allocations.

15.4 The retail floorspace and expenditure projections within this report assume low expenditure growth between 2012 and 2014 due to the effects of the recession, but the projections assume a recovery after 2014. If the recovery is slower than envisaged in this study, then the floorspace projections will need to be re-assessed. It may be prudent to adopt a cautious approach until firmer signs of the economic recovery are established. Long term forecasts up to 2027 and 2031 may be more susceptible to change, due to unforeseen circumstances. Long term projections should be monitored and kept under review.

Convenience Goods Development

15.5 On the basis of the assumption that existing convenience retailers and commitments trade at national average turnover levels, the quantitative capacity analysis indicates there is capacity for a significant amount of additional convenience goods floorspace across the borough, over and above commitments.

15.6 The convenience goods floorspace projection for the borough as a whole is 11,133 sq m net up to 2031. The priority for new store development over and above commitments is within the West of Haringey.

Comparison Goods Development

15.7 The comparison goods floorspace projection for the borough as a whole is 26,245 sq m net (34,994 sq m gross) up to 2031. This projection is over and above commitments.

The Designation and Role of Centres in the Borough

15.8 The NPPF states that Local Authorities should use their evidence base to assess the role and function of town centres and the relationship between them, including any trends in the performance of centres.

15.9 The sequential approach indicates that town centres are the preferred location for main town centre uses including retail and leisure development. Some forms of development may be more appropriate in smaller centres, if there are localised areas of deficiency. The key issues are the nature and scale of retail development proposed and the catchment area the development seeks to serve. Development should normally be consistent in terms of scale and nature with the character and role of the nearest centre. Therefore, development plan policies should provide clear advice in this respect.

15.10 The NPPF states that Local planning authorities should apply a sequential test to planning applications for main town centre uses that are not in an existing centre and are not in accordance with an up-to-date Local Plan. They should require applications for main town centre uses to be located in town centres, then in edge of centre locations and only if suitable sites are not available should out of centre sites be considered. When considering edge of centre and out of centre proposals, preference should be given to accessible sites that are well connected to the town centre. Applicants and local planning authorities should demonstrate flexibility on issues such as format and scale.

15.11 Edge of centre sites for shopping purposes are well connected sites within 300 metres of the primary shopping area. In practical terms a 400 metre distance from the main shopping centres within the London Borough of Haringey would cover a large part of the borough. Most of the main centres are surrounded by predominately residential areas, and retail development within edge-of-centre areas may be undesirable or unviable.

15.12 The nature, role and location of proposed retail schemes should be considered when applying the sequential approach. Future development plan policies in the London Borough of Haringey must clearly define where centres lie in the hierarchy in order to avoid confusion when applying the sequential approach.

15.13 The UDP identifies 44 centres. The UDP and Local Plan identify the following six *'Metropolitan'* and *'District'* Centres:

- Wood Green Metropolitan Centre;
- Muswell Hill District Centre;
- Crouch End District Centre;
- Bruce Grove/Tottenham High Road District Centre;
- Green Lanes District Centre; and
- West Green Road/Seven Sisters District Centre.

15.14 Below these main centres, the UDP identifies 38 '*Local Centres*'. Within the London Plan, Wood Green is classified as one of the ten *Metropolitan Centres*.

Muswell Hill, Crouch End, Tottenham, Green Lanes and West Green Road are classified as *District Centres*. Finsbury Park is classified as a *District Centre* in Haringey shared with Hackney and Islington.

15.15 For the most part, the UDP and Local Plan designations for the main centres in the borough are consistent with the London Plan. The London Plan and Local Plan both propose that Tottenham Hale Retail Park could potentially become a District Centre.

15.16 There is no definition of centres within the NPPF. Typically, city centres are the highest level of centre and will often be a regional centre and will serve a wide catchment, town centres are usually the second level of centres and, in many cases, they will be the principal centre or centres in a local authority's area. Wood Green best fits these descriptions. As a Metropolitan Centre it serves a wide catchment area covering several boroughs and offers a range of comparison shopping and also has a significant employment, service and leisure function.

15.17 *District Centres* will usually comprise groups of shops often containing at least one supermarket or superstore, and a range of non-retail services, such as banks, building societies and restaurants, as well as local public facilities such as a library. The London Plan suggests *District Centres* traditionally provide convenience goods and services for more local communities and are accessible by public transport, walking and cycling. Typically they contain 10,000–50,000 sq.m of retail floorspace, although some may have developed specialist shopping functions.

15.18 In our view Muswell Hill, Crouch End, Bruce Grove/Tottenham High Road, Green Lanes and West Green Road/Seven Sisters roles are in line with the London Plan's description for district centres.

15.19 The London Plan and adopted Local Plan both state that Tottenham Hale has the potential to be designated as a district centre.

15.20 We consider that if the emerging plans for the wider opportunity area come forward, the location of the existing centres within the east of the borough would not be able to fully serve the opportunity area and it may therefore be necessary to allow for additional retail development at Tottenham Hale.

15.21 Tottenham Hale Retail Park could be allocated as a District Centre in terms of the current scale of floorspace, however, there would need to be an intensification of uses on the Park to broaden the range and type of retailers and services. This would need to include smaller units for non-retail/community services.

15.22 Clearly, if Tottenham Hale is defined as a District Centre development within the centre or change of use would not be subject to the NPPF retail tests (sequential and impact). Clear policy guidance will need to be provided to set out how the centre should be developed in the future.

15.23 Below district centres, The London Plan states that neighbourhood and more local centres typically serve a localised catchment often most accessible by walking and cycling and include local parades and small clusters of shops, mostly for convenience goods and other services and that they may include a small supermarket (typically up to around 500 sq.m), sub-post office, pharmacy, laundrette and other useful local services.

15.24 In our view none of the local centres should be reclassified as district centres, based on the current scale of commercial floorspace. We do not consider that any local centres should be de-designated, however, as set out in Section 11.0, a number of centres should be monitored closely and the take up of vacant units should be encouraged in a number of the centres to improve their vitality and viability. This may involve improving the attractiveness of the street scene or encouraging pop-up/community shops.

Town Centre Boundary and Frontage Review

15.25 The adopted UDP and proposals map defines town centre and primary/secondary shopping frontages within the borough.

15.26 We consider the town centre boundaries and primary/secondary shopping frontages to be appropriate for Wood Green, Muswell Hill and Green Lanes, having regard to both the existing situation and the identified site allocations for potential development within them.

15.27 In Crouch End, we consider the current defined Town Centre Boundary and Secondary Shopping Frontages should be expanded to include:

- The Marks and Spencer Simply Food store on Crouch End Hill; and
- The identified potential development site on Tottenham Lane (163A-165) which includes Roseberry House.

15.28 Further to this, in line with the NPPF, Primary Shopping Area boundaries should be defined for Wood Green Metropolitan Centre and all District Centres in the borough. The NPPF states that Primary Shopping Areas are the *"defined area where retail development is concentrated (generally comprising the primary and those secondary frontages which are adjoining and closely related to the primary shopping frontage)".*

Clustering of Uses

15.29 We have assessed the clustering of certain Class A uses within each centre, particularly Class A2 and A5 uses focussing on betting shops (book makers), loan shops and hot-food takeaways.

15.30 Plans of the Class A uses within Wood Green, Muswell Hill, Crouch End and Green Lanes can be found in Appendix 11. Our analysis does not suggest that there is any significant clustering of specific uses, such as betting shops, within the town centres. A higher number of these types of uses can be found in the larger centres such as Wood Green, but this reflects the centre's

Metropolitan Centre designation and the proportion of units in these uses remains small.

15.31 With regards to Local Centres, these often include a range of retail service uses (Class A2-A5) and our analysis has not identified any obvious clustering in the Local Centres. For example, the majority of Local Centres have at most one betting shop, as shown in Table 12.1. Two Local Centres have more than one betting shop (Lordship Lane Roundway and Lordship Lane West), however, these are both large local centres and the number of units is a relatively small proportion of the total units in the centre.

15.32 We therefore do not consider that there is any requirement to control the amount and location of Class A2 and A5 uses at this stage either through an Article 4 Direction or new planning policies. In order to successfully support an Article 4 Direction (or the introduction of an exclusion zone) sound and robust evidence will be required and in our view the current evidence does not suggest this approach can be sustained. However, this needs to be carefully monitored by the Council.

15.33 We suggest that to maintain an appropriate balance of shops and other town centre uses in town centres, future retail planning policy should seek to maintain the proportion of Class A1 uses in each centre (through a percentage/no. of units criteria).

15.34 The current UDP Policy (TCR3) states that proposals to change the use from existing Class A1 retail will be allowed provided that, where appropriate as a general guideline, the resulting proportion of A1 units does not fall below 65% in the primary frontage and 50% in the secondary frontage and that the change of use does not result in a significant break, normally 3 frontages, in the continuity of retail frontage; and individually or cumulatively the proposed use does not have an adverse effect on the vitality, viability or predominantly retail function of the centre.

15.35 We consider the current UDP Policy should be maintained. However, if considered necessary, a criteria could be included that requires consideration on a case by case basis to be given to the balance of shops and services where a change of use to Class A2 or A3/A5 is proposed i.e. assessment of the number of existing units within the specific use proposed. However, any such criteria would require the continued monitoring of existing uses within the primary and secondary frontages.

Implementation and Monitoring

15.36 The retail floorspace and expenditure projections within this report assume low expenditure growth between 2011 and 2014 due to the effects of the recession, but the projections assume a recovery after 2013/2014 in line with previous long term growth trends. If the recovery is slower than envisaged in this study, then the floorspace projections (particularly up to 2017) will need to be re-assessed. It may be prudent to adopt a cautious approach until firmer signs of the economic recovery are established.

15.37 Long term forecasts up to 2027 and 2031 may be more susceptible to change, due to unforeseen circumstances. Projected surplus expenditure beyond 2019 is attributable to projected growth in spending per capita, extrapolated from past growth projections. If the growth in expenditure is lower than that forecast then the scope for additional space will reduce. Long term projections should be monitored and kept under review.

15.38 Floorspace projections should not inhibit competition between retailers when located within centres, subject to the consideration of impact. However, if an out-of-centre proposal exceeds the floorspace projections then the proposal's impact will need to be carefully considered.

15.39 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. Therefore, we would recommend that this retail study should be updated in 4-5 years time and the floorspace projections rolled forward.

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