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Planning. Design. Economics.

**Wood Green Town Centre
Regeneration**

Retail Capacity Assessment

London Borough of Haringey

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14590/PW/PW

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1.0 Introduction

Background

- 1.1 Nathaniel Lichfield & Partners (NLP) was commissioned by the London Borough of Haringey to prepare the Haringey Retail and Town Centre Study published in 2013 (HRTC 2013).
- 1.2 Haringey Council has commissioned a comprehensive delivery and investment plan for the regeneration of Wood Green Town Centre. This work will inform the Council's emerging Action Area Plan for the Town Centre.
- 1.3 In order to feed into this on-going work, NLP has been commissioned by Haringey Council to provide independent retail planning advice to undertake a partial update of the HRTC, and to highlight the implications for the proposed regeneration of Wood Green town centre.
- 1.4 The update provides more robust information on future expenditure-based capacity for comparison and convenience goods floorspace in Wood Green. The key elements of work updated include:
- 1 revised retail floorspace data for Wood Green town centre based on the latest Goad Plan data;
 - 2 updated turnover estimates for existing and proposed retail floorspace within Wood Green town centre;
 - 3 Experian's latest 2014 local expenditure data;
 - 4 2011 census and GLA's 2014 round of population projections;
 - 5 Experian's latest (October 2015) expenditure growth projections and home shopping projections;
 - 6 update of benchmark turnovers for existing food stores (Intel November 2015 data);
 - 7 impact implications of commitments implemented since 2013 and pipeline proposals including Brent Cross; and
 - 8 market commentary of recent changes and forecast for home shopping and how these will influence the demand for new floorspace and retail capacity projections.

2.0 **Recent Changes and Retail Trends**

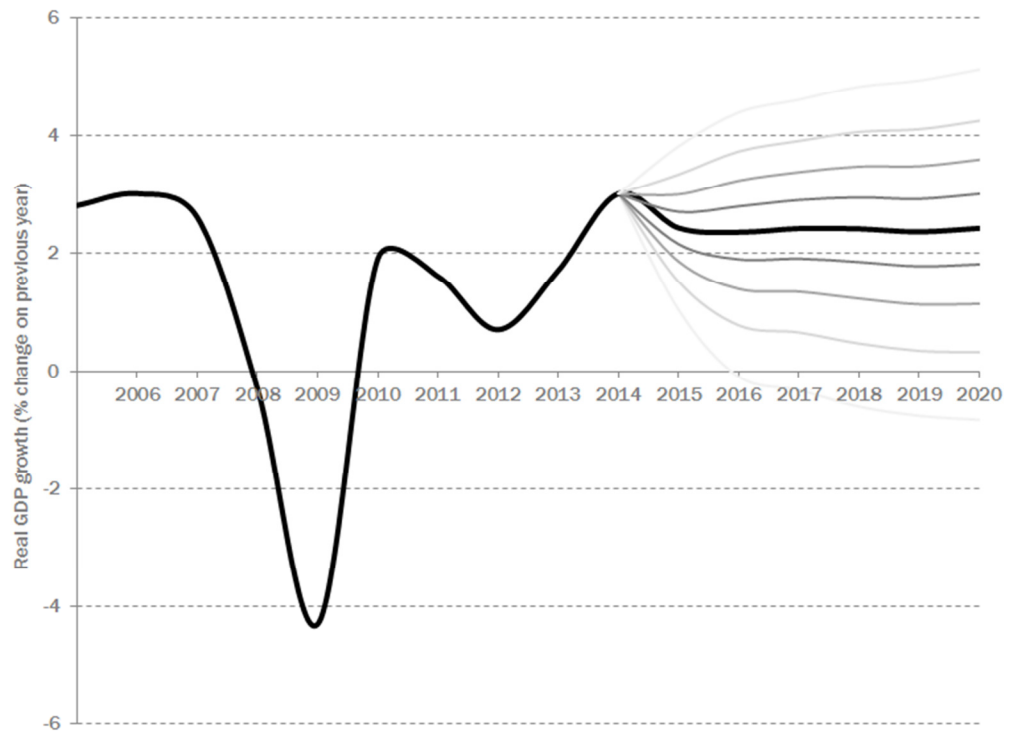
Retail and High Street Trends

- 2.1 This section considers the changes in the retail sector nationally and the implications for Haringey Borough and Wood Green.
- 2.2 The economic downturn had a significant impact on the retail sector. A large number of national operators failed (e.g. Phones 4 U, Blockbuster, Comet, HMV, JJB Sports, Jessops, Clinton Cards, Woolworths, MFI, Land of Leather, Borders, Game, Firetrap, Peacocks, La Senza, Past Times, Barratts and Habitat), leaving major voids within town centres and on retail parks.
- 2.3 Many town centre development schemes were delayed or cancelled. The demand for traditional retail warehouse operators was, and still is affected. The main food store operators have seen a reduction in growth, with proposed new foods cancelled.
- 2.4 Assessing future expenditure levels within this study needs to take into account the likely speed of the economic recovery. Careful consideration is needed to establish the appropriate level of expenditure growth to be adopted. This study takes a long term view 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.
- 2.5 An overview of national trends within the retail sector is set out below.

Expenditure Growth

- 2.6 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 recovery from the economic downturn is expected to result in slower growth in the short term.
- 2.7 Figure 3.1 shows the Office for Budget Responsibility's (OBR) forecast for GDP up to 2020. After the recession in 2008, growth rebounded and from 2012 grew to the high of 3% in 2014. The OBR forecasts that growth will be slightly above 2% per year from 2015 onwards.
- 2.8 In the past, expenditure growth has fuelled growth in retail floorspace, including major out-of-centre development, particularly in the 1980s and 1990s. The speed of recovery from the economic downturn has been slow. The high pre-recession growth rates 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 modern retail floorspace, even allowing for continued growth in home shopping. These national trends are anticipated to be mirrored in Haringey.

Figure 2.1 Forecast GDP Growth to 2020



Source: ONS, OBR

- 2.9 For convenience goods, Experian anticipates limited growth (0.1% per annum). For comparison goods, higher levels of growth are expected in the future (2.9% per annum), still at a lower rate than previous pre-recession trends. Historically comparison goods expenditure has growth significantly more than convenience goods expenditure, and Experian's latest national growth rate recommendations are consistent with these past trends.
- 2.10 Low expenditure growth and deflationary pressures (i.e. price cutting) in the non-food sector have had an impact on the high street in the last few years. As a result of these trends, the national average shop vacancy rate (based on Goad Plan data) has increased from around 10% in 2005 to over 12% in 2014. There are 21 vacant Class A shop units within Wood Green, which equates to an overall vacancy rate of 6.1%, which is lower than the Goad national average (11.8%). These figures suggest that during and since the recession, Wood Green has performed better than other centres across the country in terms of shop vacancies, although the number of vacant units has increased since 2012.

New Forms of Retailing

- 2.11 New forms of retailing (multi-channel shopping) have continued to grow. Home/electronic shopping has increased with the growth in the use of personal computers, smart phones and the internet. Click and collect shopping has

become more popular. The future growth of multi-channel retailing including home computing, internet connections and interactive TV will continue to have an effect on retailing in the high street and from traditional stores. Trends within this sector will have implications for retailing within Wood Green and Haringey.

2.12 Recent trends suggest continued strong growth in this sector. Experian's Retail Planner Briefing Note 13 (October 2015) 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 over 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 11.7% in mid-2015 against 4.7% in June 2008...

...non-store retailing continues to grow rapidly, outpacing traditional forms of spending. We retain our assumption that non-store retailing will increase at a faster pace than total retail sales well into the long term. There were 57.3 million internet users in the UK (representing 88.4% of the population) in mid-year 2014 according to Internet World Stats. 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 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 forecast has the SFT share of total retail sales reaching 17.8% by 2020 rising to 19.6% by the mid-2030s."

2.13 This retail update 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.

2.14 The implications for the demand for retail space have been carefully considered. Some retailers operate on-line sales from their traditional retail premises e.g. food store operators and click and collect operations, therefore growth in on-line sales may not always mean there is a reduction in the need for retail floorspace.

2.15 Given the likelihood that multi-channel shopping is likely to grow at a faster pace than total retail expenditure, the retail study assessment has adopted relatively cautious growth projections for retail expenditure (as set out in the retail capacity methodology, Appendix 1), and allowance has been made for retailers to increase their turnover density, due to growth in home shopping and click and collect.

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

Tesco Express, Sainsbury's Local and Little Waitrose stores has increased significantly during the last decade. This trend has been particularly evident in Haringey, with numerous local convenience stores operated by the main food store retailers e.g. Sainsbury's and Tesco

- 2.17 A number of proposed larger food stores have not been implemented across the country, but this trend is less evident in London, perhaps due to the high growth in population and the absence of available sites for larger food stores.
- 2.18 The expansion of European discount food operators Aldi and Lidl has been rapid during the last decade. This is evident in Haringey, which currently has an Aldi store and three Lidl stores.
- 2.19 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, Next, TK Maxx and Poundstretcher. Matalan has also opened numerous discount clothing stores across the UK. Sports clothing retail warehouses including Decathlon have also expanded out-of-centre.
- 2.20 The charity shop sector has grown steadily over the past 20 years and there is no sign this trend will halt. In many centres, charity shops have occupied vacated shop premises during the recession. In many cases charity shops can afford higher rents than small independent occupiers because of business rate discounts, therefore it does not follow that these charity shops will be replaced by traditional shops when the market recovers, particularly in secondary frontages. This trend is evident in Wood Green although charity shops account for 4.5% of all comparison shops within Wood Green, compared with the national average of 8.4%.
- 2.21 The discount comparison sector has also grown significantly in recent years e.g. pound shops. This sector is well represented in Wood Green.
- 2.22 The growth of money lending/pay day loan shops and betting shops has also raised concerns amongst planning authorities, and has resulted in a change to permitted development rights in order to control the growth of these uses in town centres. Again this trend is evident in Wood Green.
- 2.23 Within town centres, many high street multiple comparison retailers have changed their format. For over a decade, high street national multiples have increasingly sought larger modern shop units (over 200 sq.m) with an increasing polarisation of activity into the larger national, regional and sub-regional centres, e.g. Central London, Brent Cross, Westfield and Lakeside.
- 2.24 In general operator demand for space has decreased during the recession and, of those national multiples looking for space, many prefer to locate in larger centres.
- 2.25 The demand for premises within the bulky goods sector, i.e. furniture, carpets, electrical and DIY goods, has been particularly weak during and after the

recession. This has led to voids on retail warehouse parks and proposals to extend the range of goods sold to non-bulky goods.

- 2.26 The continuation of these trends will influence future operator requirements in Wood Green with smaller vacant units becoming less attractive for new multiple occupiers, and retailers increasingly looking to relocate into larger units in higher order centres. However, smaller vacant units could still be attractive to independent traders and non-retail services.
- 2.27 Recent and proposed changes to the General Permitted Development Order (GPDO) may also have an impact on town centres. These measures allow for greater flexibility for changes of use from retail to non-retail uses e.g. Class A uses to C3 residential use and Class A1 to A2 use. These measures could change the composition of town centres, in particular the amount of Class A1 space could reduce. The measures may lead to a reduction in vacant shop premises, particularly in peripheral shop frontages, but this could have an impact on the ability of operators to find space, in areas where demand is high. It is unlikely these changes will have a significant impact on Wood Green, because the centre already has a broad mix of retail and non-retail uses.
- 2.28 These trends are not new and have been affecting the High Street for many years. In response to these trends, town centres have changed and diversified. The food and beverage, leisure and non-retail service sectors have been successful in occupying space no longer suitable for shopping. There have been cyclical trends in vacancy rates reflecting the macro economic trends, but in most cases town centres recovered during periods of stronger growth. The High Street is more resilient than many commentators give it credit.
- 2.29 Shopping behaviour will continue to change and the High Street will need to continue to respond. All town centres will need to focus on the advantages they have over other forms of multi-channel shopping, for example using the internet as an extended shop window, click and collect facilities and providing a combined retail and leisure experience. There will always be demand for a day out and customers cannot eat or drink on-line.

Services, Food and Beverage

- 2.30 Service uses perform an important role in the overall offer of a centre, and encourage customers to shop locally. The service uses are categorised as follows:
- **Class A1 services** cover a range of uses, including hairdressers, dry cleaners, travel agents, some sandwich shops (those not categorised as Class A3), funeral parlours and post offices.
 - **Class A2 services** include banks, building societies, financial services, betting offices, pawnbrokers, estate agents and employment agencies.
 - **Class A3/A5** includes restaurants, cafés (A3) and takeaways (A5).
 - **Class A4** pubs/bars (Class A4).

- 2.31 Food and beverages is a fast moving and creative sector, with a steady flow of new concepts emerging. Within this sector there has been a significant increase in the number of national multiple chains. These national chains have sought to increase their geographical coverage. These types of food and drink operators (Class A3 and A4) i.e. restaurants, bars and pubs have supported other major leisure uses, in particular cinema developments. Within town centres, the demand has increased, including a significant expansion in the number of coffee shops, such as Starbucks, Costa Coffee and Café Nero. Themed restaurants have also expanded rapidly.
- 2.32 The key categories for food and beverage offers are:
- 1 **impulse:** characterised by their produce range that is typically highly visual and hand-held so that it can be eaten “on the go”;
 - 2 **speed eating fast food:** food that can be purchased and consumed quickly, therefore price is low and ambience is less important. This sector is dominated by traditional high volume fast food offers such as burgers and fried chicken;
 - 3 **refuel and relax:** a drink and snacks and a short break in a pleasant environment rather than focusing on eating a main meal; and
 - 4 **casual dining/leisure dining:** incorporating a number of food styles, types and ethnic origins. The ambience and environment of casual dining is as important as the food, drink and service provided. The style is informal but is normally table service.
- 2.33 Food and beverage establishments (Class A3, A4 and A5) including restaurants, bars and pubs have supported other major leisure uses on leisure and retail parks and are important services within town and local centres. National information available from Experian Goad indicates that the proportion of non-retail uses within town centres across the country has increased significantly. A balance between Class A1 and Class A3 to A5 uses needs to be maintained.

Conclusions

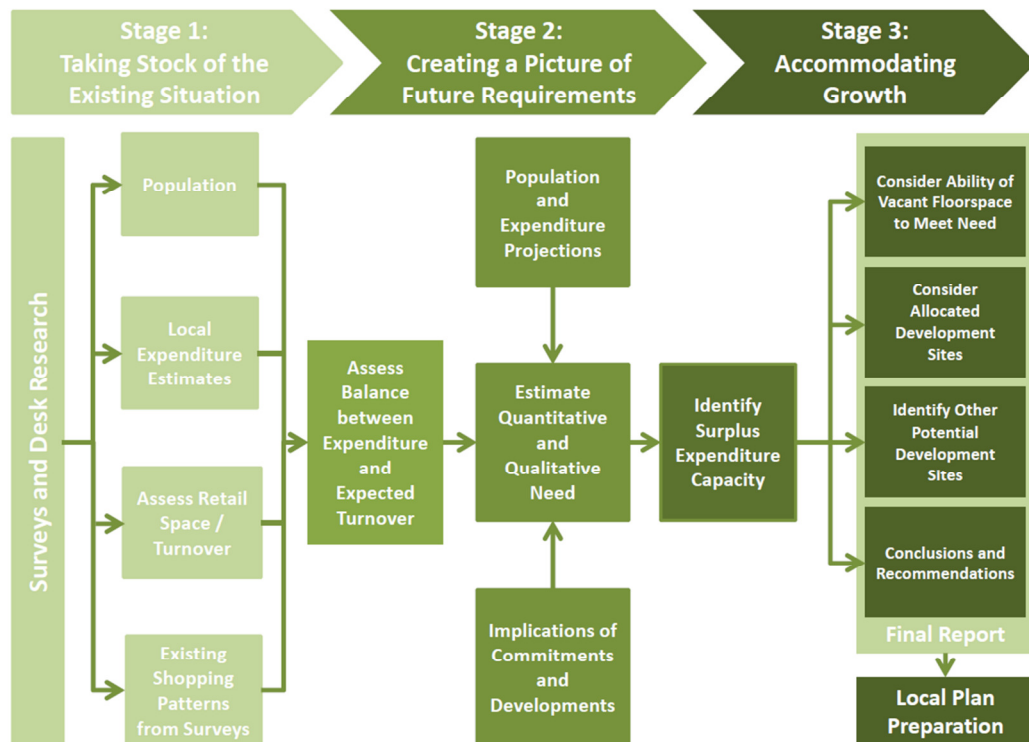
- 2.34 The challenge for town centres generally, and within Wood Green specifically, will be to capitalise on this growth by securing much needed investment. There will be continued scope for Wood Green to diversify, for example the evening economy, leisure and entertainment and more focus on convenience and service, but comparison retail will still be the driver of growth.
- 2.35 The delivery of town centre redevelopment opportunities will be the priority. There will be a requirement to build more retail floorspace within Wood Green, not only to boost its retail offer and compete effectively with other centres, but also to secure investment in the centre.

3.0 Retail Need Assessment

Introduction

3.1 This section objectively assesses the quantitative scope for new retail floorspace in LB Haringey and specifically Wood Green in the period from 2016 to 2032. The methodology is summarised in Figure 3.1 below and set out in more detail in Appendix 1.

Figure 3.1: Methodology for Estimating Future Requirements for Retail Floorspace



Study Area

3.2 The quantitative analysis is based on a defined study area that covers the catchment areas of the main shopping destinations in LB Haringey. The study area is shown in Appendix 1. There will be retail expenditure leakage from the study area to centres outside, but conversely expenditure will inflow from surrounding areas.

Population and Expenditure

- 3.3 The study area population for 2011 to 2032 is set out in Table 1 in Appendix 2. The 2011 base year population for each zone has been obtained and projected to 2031 using the GLA 2014 Round of Demographic Projections ward (SHLAA bases) projections.
- 3.4 Table 2 in Appendix 2 sets out the forecast growth in spending per head for convenience goods within each zone in the study area up to 2032. Forecasts of comparison goods spending per capita are shown in Table 2 in Appendix 3.
- 3.5 Based on the GLA population projections, as a consequence of growth in population and per capita spending, convenience goods spending within the study area is forecast to increase by 12.6% from £1,008 million in 2016 to £1,135 million in 2032, as shown in Table 3 (Appendix 2).
- 3.6 Comparison goods spending is forecast to increase by 84% between 2014 and 2031, increasing from £1,543 million in 2014 to £2,836 million in 2031, as shown in Table 3 (Appendix 3).
- 3.7 It should be noted that comparison goods spending is forecast to increase more than convenience spending as the amount spent on food and beverage does not increase proportionately with disposable income, whereas spending on non-food goods is more closely linked to income.
- 3.8 These figures relate to real growth and exclude inflation.

Existing Retail Floorspace

- 3.9 Existing convenience goods retail sales floorspace within Haringey is around 52,700 sq.m net, as set out in Table 10 in Appendix 2. This floorspace figure excludes comparison sales floorspace within food stores. This floorspace is relatively evenly spread throughout the Borough. The amount of convenience goods sales floorspace has increase from 48,700 sq.m net in 2012, due primarily to the new Sainsbury's store at Northumberland Park in Tottenham.
- 3.10 Within the Wood Green area convenience goods sales floorspace is around 10,500 sq.m net, about 20% of the Borough total.
- 3.11 Comparison goods retail floorspace within Haringey was estimated to be around 101,400 sq.m net in 2012, of which 40,700 sq.m net (40%) was located in Wood Green (including 1,600 sq.m net non-food within food stores). This net sales floorspace was based on a Goad Plan gross floorspace figure of 55,800 sq.m gross (assuming a net to gross ratio of 70%). Despite the reduction in comparison shop units in Wood Green (182 to 154), Goad indicates that the amount of comparison goods floorspace has increased marginally to 57,200 sq.m gross, and therefore the revised sales floorspace estimate is 41,600 sq.m net (including 1,600 sq.m net non-food within food stores).

Existing Spending Patterns 2016

- 3.12 The results of the household shopper questionnaire survey undertaken by NEMS in September 2012 were adopted to estimate base year shopping patterns within the study area zones.
- 3.13 The market penetration rates were adjusted to take into account planned commitments e.g. the new Sainsbury's at Northumberland Park and replacement Aldi store. Future penetration rates were adjusted to reflect the implementation of these commitments. The adjusted future penetration rates have been revisited to provide new base year shopping patterns at 2016.

Convenience Shopping

- 3.14 The adjusted estimates of market share or penetration within each study area zone are shown in Table 4, Appendix 2.
- 3.15 Table 4 (Appendix 2) indicates the proportion of convenience goods expenditure retained within Borough from residents in the Wood Green area (Zone 1) is relatively high at 77%. Based on NLP's experience from other recent studies across London, this level of convenience goods expenditure retention is relatively high. There appears to be limited scope to increase the retention of convenience goods expenditure within the Wood Green area.
- 3.16 The level of convenience goods expenditure attracted to shops/stores in LB Haringey in 2016 is estimated to be £572 million as shown in Table 5, Appendix 2. This includes estimates of inflow from beyond the study area, applying the adjusted market shares set out in Table 4.
- 3.17 The total benchmark turnover of identified existing convenience sales floorspace within Haringey, based on company average sales densities is £496 million (Table 10 in Appendix 2), compared with the actual turnover of £572 million. These figures suggest that convenience retail sales floorspace in the Borough is trading healthily at 15% above the expected benchmark. This suggests a base year expenditure surplus of £76 million.
- 3.18 Within Wood Green the base year turnover of convenience goods facilities is estimated to be £127 million, compared with the expected benchmark turnover of £101 million, which suggests trading levels about 25% above expected levels. Based on NLP's recent experience, food stores within London tend to trade above national average sales densities, which may reflect higher property costs and over heads. Furthermore, food stores in London tend to be smaller with less circulation space and therefore the sales density per unit of floorspace is likely to be higher.
- 3.19 The future levels of available convenience goods expenditure in 2019, 2022, 2027 and 2032 are shown at Tables 6 to 9 in Appendix 2. These projections are based on constant market shares. The total level of convenience goods expenditure available for shops in Haringey between 2016 and 2032 is summarised in Table 11 in Appendix 2. Allowing for population and

expenditure per capita growth and increased market shares, convenience goods expenditure available to shopping facilities in the Borough is expected to increase from £572 million in 2016 to £603 million in 2022, an additional £31 million. Available expenditure will increase by a further £45 million by 2032, to £648 million.

3.20 Available convenience good expenditure attracted to Wood Green is estimated to increase from £126 million in 2016 to £147 million in 2032, an increase of £21 million.

3.21 The expenditure projections are converted into potential new floorspace estimates in Table 12 in Appendix 2. Expenditure growth is converted into floorspace estimates based on an assumed average sales density figure for the main food supermarket operators (for all store formats). An average sales density of £9,408 per sq.m net has been adopted, which reflects the current mix of floorspace within the Borough. No increase in sales density has been assumed for convenience goods, in line with Experian forecasts.

3.22 The floorspace requirements are summarised in Table 3.1 below.

Table 3.1: Convenience Goods Floorspace Projections

Area	By 2022 Sq.m Net (Gross)	By 2027 Sq.m Net (Gross)	By 2032 Sq.m Net (Gross)
Wood Green	3,300 (4,400)	3,759 (5,012)	4,488 (5,984)
Rest of LB Haringey	6,549 (8,732)	7,637 (10,183)	9,604 (12,805)
Total	9,849 (13,132)	11,396 (15,195)	14,092 (18,789)

Source: Table 12 in Appendix 2

3.23 The 2013 Haringey retail capacity assessment suggested a marginally lower figure of 11,133 sq.m net would be required within the Borough by 2031, of which 3,882 sq.m net was to be located in the Wood Green/Green Lanes area.

Comparison Shopping

3.24 The estimated comparison goods expenditure currently attracted by shopping facilities within Haringey is £699 million in 2016, as shown in Table 5, Appendix 3. The retention of comparison goods expenditure within the Borough is lower than for convenience goods shopping because residents will generally shop around more for comparison goods and travel further to visit large shopping destinations e.g. Central London, Westfield Stratford and Brent Cross. Within the Wood Green area (Zone 1), the retention rate is 45%. Overall the comparison expenditure retention rates across the Borough are reasonable,

based on NLP's recent experience across London, and reflect the influence of higher order centres.

- 3.25 The implementation of new investment could provide scope to increase the retention of comparison goods expenditure within the Wood Green area, but conversely expansion at Brent Cross and Westfield Stratford may increase expenditure leakage.
- 3.26 Based on the base year estimate of comparison goods expenditure attracted to facilities within the Borough, the average sales density for existing comparison sales floorspace (102,300 sq.m net) is £6,833 per sq.m net. The average sales density in Wood Green is £6,814 per sq.m net. The Borough average was £5,420 per sq.m net in 2012, which suggest sales densities have grown by 26% between 2012 and 2016. Overall comparison retail floorspace within the Borough and Wood Green is trading healthily.
- 3.27 Available comparison goods expenditure has been projected forward to 2019, 2022, 2027 and 2032 in Tables 5 to 9 in Appendix 3, based on constant market shares and summarised in Table 10. Available comparison expenditure to facilities within Haringey is expected to increase from £699 million in 2016 to £1,301 million in 2032.
- 3.28 Available comparison good expenditure attracted to Wood Green is estimated to increase from £283 million in 2016 to £533 million in 2032, an increase of £250 million.
- 3.29 For the purposes of this assessment, the existing comparison goods floorspace is estimated to be trading at equilibrium in 2016 (i.e. satisfactory levels). Table 10 assumes that the turnover of comparison floorspace will increase in real terms in the future. A growth rate of 2% per annum is adopted, as recommended by Experian. This growth will help to maintain the health and viability of town centres. 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.
- 3.30 Surplus comparison expenditure has been converted into net comparison sales floorspace projections at Table 11 in Appendix 3, adopting average sales densities in 2016 of £6,000 per sq.m, which is projected to grow by 2% in the future due to improved turnover efficiency. The surplus expenditure at 2032 could support 36,749 sq.m net of sales floorspace (48,999 sq.m gross).
- 3.31 The floorspace requirements are summarised in Table 3.2 below.

Table 3.2: Comparison Goods Floorspace Projections

Area	By 2022 Sq.m (gross)	By 2027 Sq.m (gross)	By 2032 Sq.m (gross)
Wood Green	3,479 (4,639)	9,570 (12,760)	15,644 (20,858)
Rest of LB Haringey	4,102 (5,469)	12,337 (16,449)	21,105 (28,140)
Total	7,581 (10,108)	21,907 (29,209)	36,749 (48,998)

Source: Table 11 in Appendix 3

Qualitative Need in Wood Green

- 3.32 The assessment in this section quantifies the theoretical capacity to support new retail floorspace within Haringey and Wood Green, based on the population projections and growth in expenditure. The qualitative need for retail facilities also needs to be considered.
- 3.33 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 underserved markets; and
 - the quality of existing provision.
- 3.34 Wood Green is located centrally within the borough. It continues to be designated as a Metropolitan Centre in both the London Plan, and serves shoppers from the borough and across North London. The centre continues to fulfil 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.

Mix of Uses and Occupier Representation

- 3.35 Wood Green Metropolitan Centre has 346 retail/service units (excluding non-retail Class A uses). Table 3.3 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. The proportion of comparison and convenience retail units is higher than the national average, whilst the proportions of non-retail services (A1, A2, A3 and A4) are all slightly below the national average, with the exception of A5 takeaways. The proportion of vacant units is significantly below the national average.

- 3.36 Between 2012 and 2015 the number of comparison shop units reduced by 28 outlets, with the number of vacant units increasing by 10 units. The number of units in all other sectors has increased slightly, which suggests Wood Green has diversified slightly away from comparison retailing to other food and service uses.
- 3.37 The increase in vacant units is not significant and there are no obvious concentrations of vacant units within the centre. The vacancy rate remains around half 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 3.3 Wood Green Metropolitan Centre Use Class A Mix by Unit

Type of Unit	Units 2012	Units 2015	% of Units 2015	
			Wood Green%	UK Average ⁽¹⁾
A1 Comparison Retail	182	154	44.5	35.8
A1 Convenience Retail	30	36	10.4	8.4
A1 Services ⁽¹⁾	31	35	10.1	12.3
A2 Services ⁽²⁾	27	37	10.7	12.3
A3 Restaurants/Cafés	26	29	8.4	9.0
A4 Pubs/bar	7	8	2.3	4.5
A5 Takeaways	23	26	7.5	5.9
Vacant	11	21	6.1	11.8
Total	337	346	100.0	100.0

Source: Experian Goad 2012 and 2015.

(1) UK average for all town centres surveyed by Goad Plans (2015)

(2) incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience goods

(3) Class A2 includes betting shops and pay day loan shops – reclassified as Sui Generis from April 2015.

Convenience Goods Retailer Representation

- 3.38 Wood Green has three large food stores (over 1,000 sq.m net) and also a large Marks & Spencer food hall. Morrison's is the only food superstore (over 2,500 sq.m net), and is one of only four superstores in the Borough. The Sainsbury's and Lidl stores in Wood Green offer a reasonable range of goods suitable for bulk food shopping.
- 3.39 These large food stores are supported by a number of small convenience stores i.e. Tesco Express, Sainsbury's Local and Costcutter stores that are suitable for basket and top-u food shopping. The centre has a good selection of small, predominantly independent, convenience shops and market stalls. There are a number of international and ethnic specialists.
- 3.40 The retail capacity projections set out in Table 12 in Appendix 2, suggests the highest convenience goods expenditure surplus in 2016 relates to the Crouch End/Muswell Hill area. Crouch End and Muswell Hill are the main areas of quantitative deficiency in terms of large food store provision. However the analysis of shopping patterns suggests there is some overlap in the convenience goods catchment areas of Wood Green and Crouch End/Muswell

Hill, therefore it is possible some of the surplus capacity could be transferred to Wood Green.

- 3.41 There is potential to improve food store representation in Wood Green.

Comparison Goods Retailer Representation

- 3.42 Wood Green is the main high street comparison shopping destination and the highest ranking centre within the Borough. The centre provides a good range of comparison shops, including many national multiples and independent specialists. However the offer is focus on the mid-market, value and discount sectors.
- 3.43 Wood Green does not provide the same range and choice of comparison shopping facilities when compared with higher order shopping centres e.g. the Westfield Stratford and Brent Cross. Many residents with the Borough are likely to continue to shop outside the borough.
- 3.44 Despite the reduction in comparison shops since 2012, Wood Green Centre still has a good variety of outlets (154). This retail offer reflects the centre's role in serving a wide catchment area. The wide choice and range of comparison retailers is consistent with the London Plan's designation as a Metropolitan Centre. Table 3.4 provides a breakdown of comparison shop units by Goad categories.

Table 3.4 Wood Green Town Centre Breakdown of Comparison Units

Type of Unit	Wood Green		% UK Average*
	Units 2015	%	
Clothing and footwear	63	40.9	25.0
Furniture, carpets and textiles	7	4.5	7.4
Booksellers, arts, crafts and stationers	3	1.9	10.6
Electrical, gas, music and photography	19	12.3	9.4
DIY, hardware and homewares	4	2.6	6.4
China, glass, gifts and fancy goods	3	1.9	4.6
Cars, motorcycles and motor access	1	0.6	1.3
Chemists, drug stores and opticians	15	9.7	10.0
Variety, department and catalogue	6	3.9	1.6
Florists, nurserymen and seedsmen	1	0.6	2.3
Toys, hobby, cycle and sport	7	4.5	5.2
Jewellers	7	4.5	5.0
Charity, second-hand shops	7	4.5	8.4
Other comparison retailers	12	7.7	2.9
Total	154	100.0	100.0

Source: Experian Goad 2012 and 2015 *UK average for centres surveyed by Goad Plans (June 2015)

- 3.45 All Goad Plan comparison categories are represented within the centre, although the range of units within some categories is much higher than others. Of the categories represented, there is a good choice of clothing and footwear shops, furniture/carpets, electrical shops and chemists/opticians. The proportion of charity shops is lower than the national average. There is a very good representation of major national multiple comparison retailers, these include:

• Argos	• H&M	• Shoe Zone
• BHS	• Halfords	• Superdrug
• Blue Inc	• JD Sports	• The Body Shop
• Boots the Chemist	• Marks & Spencer	• Tiger
• Bonmarche	• Maplin Electronics	• TK Maxx
• Burton	• Matalan	• Topman
• Carphone Warehouse	• Mothercare	• Topshop
• Claire's	• New Look	• Virgin Media
• Clarks	• Next	• Wallis
• Early Learning Centre	• O2	• WH Smith
• Ernest Jones	• Primark	• Wilko
• Game	• River Island	• Zahra
• H Samuel	• Select	

Service Uses

3.46

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 3.5.

Table 3.5 Wood Green Analysis of Selected Service Uses

Type of Unit	Wood Green		% UK Average *
	Units	%	
Restaurants/cafés	29	22.1	22.5
Fast food/takeaways	26	19.8	14.8
Pubs/bars	8	6.1	11.1
Banks/other financial services	21	16.0	11.8
Betting shops/casinos	12	9.2	3.8
Estate agents/valuers	8	6.1	9.1
Travel agents	3	2.3	2.2
Hairdressers/beauty parlours	20	15.3	22.7
Laundries/dry cleaners	4	3.1	2.1
Sub-Total	131	100.0	100.0
Other A1 Retail Services	10		
Total	141		

Source: Goad 2015 *UK average for all town centres surveyed by Goad Plans (June 2015)

3.47

The provision of takeaways, banks/other financial services and betting shops/amusement arcades are above the national average. There is an under provision of pubs/bars. The proportion of Class A3 restaurants/cafés is comparable with the national average, but the majority are cafés and coffee

shops. There are 12 restaurants, including a mix of Asian and Mediterranean food.

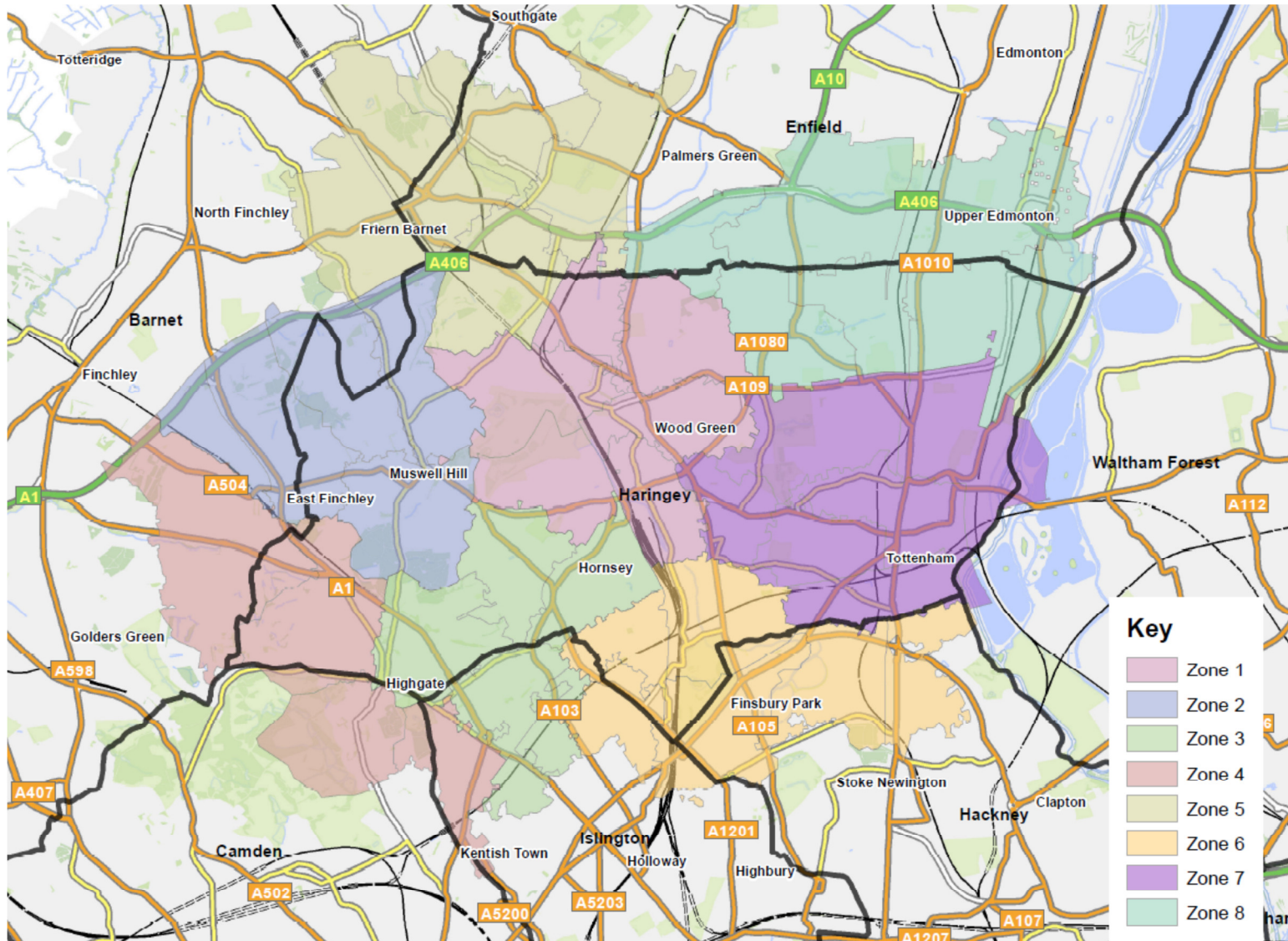
- 3.48 Most high street banks/building societies are represented within Wood Green, including Barclays, Co-op Bank, Halifax, HSBC, Natwest, Lloyds and Santander. There are also several money shops and a Post Office. In addition to Class A service uses Wood Green has several other non-retail uses serving the community including community centres, library, doctors/dental surgeries and several council offices.
- 3.49 Wood Green also has an established entertainment and leisure offer with two cinemas (Vue and Cineworld), a Mecca Bingo hall and health and fitness gyms.

4.0 Conclusions and Strategy Implications

- 4.1 The revised retail capacity projections suggest there is scope for up to 50,800 sq.m net (67,800 sq.m gross) of comparison and convenience goods retail floorspace in Haringey Borough as a whole by 2032, of which 20,100 sq.m net (26,800 sq.m gross) could be accommodated in Wood Green, assuming constant market shares and the distribution of facilities across the Borough remains unchanged.
- 4.2 As the main shopping destination within the Borough, Wood Green has the best prospects for attracting investment and large scale retail development, therefore the floorspace projections for Wood Green could be viewed as a minimum, recognising there may be opportunities to concentrate and redirect future growth in the Borough.
- 4.3 The NPPF indicates that planning authorities should promote competitive town centres and set out policies for the management and growth of centres. Part of this objective is to allocate a range of suitable sites to meet the scale and type of retail and other town centre uses needed.
- 4.4 The NPPF indicates that it is important that needs are met in full and not compromised by limited site availability. 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; and
 - the likelihood that Wood Green'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.
- 4.5 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.
- 4.6 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.

- 4.7 Vacant units could also help to accommodate growth. The strategy should seek to reduce shop vacancy levels across the Borough. The 2013 study suggested it is realistic to assume reoccupied units can accommodate approximately 8,500 sq m gross of commercial space. This estimate is only sufficient to accommodate less than 13% of the overall floorspace projection to 2032 (67,800 sq.m gross), therefore other development opportunities will need to be identified. Furthermore the vacancy rate in Wood Green is relatively low and the opportunities to accommodate growth within existing premises are more limited.
- 4.8 The 2013 study identified and assessed potential sites that could accommodate additional retail development in the Borough, but the study identified few potential retail development opportunities, primarily due to residential areas surrounding centres. The key potential retail development opportunities identified were in Crouch End and Wood Green. No development opportunities were identified in Green Lanes or Muswell Hill.
- 4.9 The AAP for Wood Green will need to explore in more detail the potential to intensify retail and town centre uses.

Appendix 1 Study Area and Methodology



Retail Capacity Methodology and Data

This section highlights the methodology and key assumptions adopted within the retail capacity assessment update. The update broadly adopts the approach within the Haringey Retail and Town Centres Study 2013 (HRTCS 2013).

Study Area and Population

HRTCS 2013 adopted a study area based on 8 sub-zones, as shown in Appendix 1. The study includes all parts of Haringey Borough and parts of neighbouring boroughs, where the catchment areas of main centres (including Wood Green) extend beyond administrative boundaries.

The HRTCS 2013 adopted 2001 Census based population projections for the postcode sector based zones. Population has been updated based on 2011 Census data and the GLA's latest ward level population projections to 2032 (2014 round ward population projections – SHLAA based), as shown in Table 1 in Appendix 2.

The HRTCS 2013 suggested the study area population would grow to around 453,000 in 2016. The revised projection is now much higher (over 8%) at over 491,000. The HRTCS 2013 projected the study area population would increase to about 483,000 in 2031. The revised projection for 2032 is over 563,000.

The implications of these much higher population projections area assessed in Section 3.

Retail Expenditure Data

All monetary values expressed in this study are at 2014 prices, consistent with Experian's base year expenditure figures for 2014 (Retail Planner Briefing Note 13, October 2015) which is the most up to date information available.

The level of available expenditure to support retailers is based on first establishing per capita levels of spending for the study area population. Experian's local consumer expenditure estimates for comparison and convenience goods for each of the study area zones for the year 2014 have been obtained.

Experian's EBS national expenditure information (Experian Retail Planner Briefing Note 13) has been used to forecast expenditure within the study area. Experian's forecasts are based on an econometric model of disaggregated consumer spending. This model takes a number of macro-economic forecasts (chiefly consumer spending, incomes and inflation) and uses them to produce forecasts of consumer spending volumes, prices and value, broken down into separate categories of goods. The model incorporates assumptions about income and price elasticities.

Experian's EBS growth forecast rates for 2014 to 2017 reflect the current economic circumstances and provide an appropriate growth rate for the short term (for convenience goods: -0.2% for 2014 to 2015, +0.1% for 2015 to 2016

and +0.3% for 2017; for comparison goods: +5.3% for 2014-2015, +3.2% for 2015-2016 and +2.9% for 2017.

In the longer term it is more difficult to forecast year on year changes in expenditure. Experian's longer term growth average forecasts have been adopted i.e. 0.1% per annum for convenience goods after 2016 and 3% per annum growth for comparison goods. These growth rates are relatively cautious when compared with past growth rates, but in our view represent realistic forecast for future growth. These growth figures relate to real growth and exclude inflation.

Special Forms of Trading (SFT) or non-store activity is included within Experian's Goods Based Expenditure (GBE) estimates. SFT includes other forms of retail expenditure not spent in shops e.g. mail order sales, some internet sales, vending machines, party plan selling, market stalls and door to door selling. SFT needs to be excluded from retail assessments because it relates to expenditure not spent in shops and does not have a direct relationship with the demand for retail floorspace. The 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. Experian provides projections for special forms of trading and e-tailing. This Experian information suggests that non-store retail sales in 2014 is:

- 8.3% of convenience goods expenditure; and
- 14.9% of comparison goods expenditure.

Experian predicts that these figures will increase in the future. However, Experian recognises that not all of this SFT expenditure should be excluded from a retail capacity analysis, because some of it relates to internet sales through traditional retail businesses, rather than internet companies. The turnover attributable to e-tail through retail businesses is included in the company average turnovers, and therefore expenditure figures should not exclude this expenditure. Experian has provided adjusted deductions for SFT and projections. These projections have been used to exclude only e-tail expenditure attributed to non-retail businesses, which will not directly impact on the demand for retail floorspace. The adjusted figures suggest that SFT sales in 2014 are:

- 2.5% of convenience goods expenditure; and
- 11.2% of comparison goods expenditure.

The projections provided by Experian suggest that these percentages could increase to 4.6% and 15.2% by 2022 respectively. In the longer term the growth is predicted to fall or reverse slightly. The long term projections are 6.0% and 14.5% by 2032. These figures have been adopted in this assessment.

Home/electronic shopping has also emerged with the increasing growth in the use of personal computers and the internet. 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.

On-line shopping has experienced rapid growth over the last 20 years, but in proportional terms the latest available data suggests it remains a relatively low percentage of total retail expenditure. Experian state that they expect that the SFT market share will continue to grow, however the pace of e-commerce growth will moderate markedly after about 2021. Experian's forecasts suggest that the SFT share of total retail sales will reach 18.3% by 2021, rising to 19.6% by 2034.

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.

Market Shares/Penetration Rates

To assess the capacity for new retail floorspace, penetration rates are estimated for shopping facilities within the study area. The assessment of penetration rates are based on a range of factors but primarily information gathered through the 2012 household survey, with NLP adjustment to reflect changes since 2012.

The total turnover of shops within Wood Green is estimated based on penetration rates. For convenience goods shopping turnover estimates are then compared to average company benchmark or average sales floorspace densities derived from Mintel's Retail Rankings and Food Store report November 2015, which provide an indication of how individual retail stores and centres are performing against expected turnover averages. This allows the identification of potential surplus or deficit capacity for retail sales floorspace.

Benchmark Turnover Levels

Company average turnover to sales floorspace densities are available for major food store operators and are compiled by Mintel. Company average sales densities (adjusted to exclude petrol and comparison sales and include VAT) have been applied to the sales area of the large food stores, and a benchmark turnover for each store has been calculated. This benchmark turnover is not necessarily the actual turnover of the food store, but it does provide a useful benchmark for assessing existing shopping patterns and the adequacy of current floorspace in quantitative terms.

The estimated convenience goods sales areas have been derived from a combination of the Institute of Oxford Retail Consultants (ORC) StorePoint database, GOAD plans, Valuation Office data and NLP estimates based on site visits. Estimates for comparison sales floorspace within large food stores has

been deducted, for consistency with the use of goods based expenditure figures.

Average sales densities are not widely available for small convenience shops, particularly independent retailers. Based on the mix of shops present in each centre within Haringey and NLP's experience of trading levels of small independent shops informed by household shopper surveys across London, we have adopted an average sales density of £8,000 per sq.m net for convenience shops/stores in the study area at 2014 prices. The total benchmark turnover of identified convenience sales floorspace within Haringey is £496 million (Tables 10 Appendix 2).

Mintel's Retail Rankings provides limited company average sales density information for a selection of national comparison retailers. Based on NLP's experience the average sales density for high street comparison retailers usually ranges between £5,000 to £8,000 per sq.m net.

Appendix 2 Convenience Goods Assessment

Table 1: Study Area Population

Expenditure Per Capita	2011	2016	2019	2022	2027	2032
1 - Wood Green	63,934	68,143	71,742	74,934	79,260	82,279
2 - Muswell Hill	41,756	44,172	44,349	44,498	44,662	45,575
3 - Crouch End	52,924	55,874	57,076	58,105	59,804	61,782
4 - Fortis Green/Highgate	29,181	31,251	31,850	32,486	33,460	34,506
5 - Arnos Grove/Palmers Green	48,369	50,978	52,778	54,074	55,403	56,155
6 - Green Lanes/Stamford Hill	77,850	83,805	85,792	88,462	92,794	97,217
7 - Bruce Grove/Tottenham High Road	78,020	85,600	89,655	92,936	97,438	101,246
8 - Tottenham/White Hart Lane	67,959	71,844	73,843	76,743	81,798	84,839
	459,993	491,666	507,085	522,238	544,619	563,599

Sources - Census of Population 2011.

GLA 2014 round ward population projections - SHLAA Based

Table 2: Convenience Goods Expenditure Per Capita (2014 Prices)

Zone	2016	2019	2022	2027	2032
1 - Wood Green	£2,076	£2,069	£2,058	£2,055	£2,048
2 - Muswell Hill	£2,410	£2,402	£2,389	£2,386	£2,378
3 - Crouch End	£2,426	£2,418	£2,406	£2,402	£2,394
4 - Fortis Green/Highgate	£2,396	£2,389	£2,376	£2,373	£2,364
5 - Arnos Grove/Palmers Green	£2,283	£2,276	£2,263	£2,260	£2,253
6 - Green Lanes/Stamford Hill	£1,951	£1,944	£1,934	£1,931	£1,925
7 - Bruce Grove/Tottenham High Road	£1,729	£1,723	£1,714	£1,712	£1,706
8 - Tottenham/White Hart Lane	£1,704	£1,698	£1,689	£1,687	£1,681

Sources:

Experian local estimates for 2014 comparison goods expenditure per capita

(Excluding special forms of trading 2.5% in 2014, 3.8% in 2019, 4.6% in 2022, 5.2% in 2027 and 6% in 2032)

Experian Business Strategies - recommended forecast growth rates

(-0.2% in 2015, 0.1% in 2016 and 0.3% per annum in 2017 and 0.1% in 2018 and beyond)

Table 3: Total Available Convenience Goods Expenditure (£M - 2014 Prices)

Zone	2016	2019	2022	2027	2032
1 - Wood Green	141.44	148.42	154.20	162.89	168.50
2 - Muswell Hill	106.45	106.53	106.32	106.57	108.37
3 - Crouch End	135.57	138.04	139.78	143.67	147.91
4 - Fortis Green/Highgate	74.89	76.08	77.18	79.39	81.59
5 - Arnos Grove/Palmers Green	116.38	120.10	122.39	125.23	126.49
6 - Green Lanes/Stamford Hill	163.48	166.80	171.07	179.22	187.11
7 - Bruce Grove/Tottenham High Road	147.98	154.48	159.28	166.78	172.69
8 - Tottenham/White Hart Lane	122.39	125.38	129.61	137.97	142.60
Total	£1,008.59	£1,035.83	£1,059.83	£1,101.72	£1,135.27

Sources:

Table 1 and Table 2

Table 4: Base Year Convenience Goods Shopping Penetration Rates 2016

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	% Inflow
Wood Green	45.0%	0.5%	5.1%	0.9%	11.5%	3.9%	9.0%	12.8%	5%
Green Lanes	6.6%	0.6%	5.5%	1.3%	1.7%	18.9%	8.3%	1.5%	5%
Muswell Hill/Crouch End	14.8%	51.0%	45.9%	18.3%	4.3%	7.9%	0.5%	0.2%	5%
Bruce Grove/Tottenham High Road	0.9%	0.2%	2.0%	2.0%	0.8%	0.5%	30.0%	35.0%	5%
West Green/Seven Sisters	0.0%	0.0%	0.0%	0.0%	0.0%	1.3%	7.7%	1.3%	5%
Other/Local Shops	9.7%	1.4%	8.0%	8.4%	1.8%	8.9%	12.0%	9.0%	5%
LB of Haringey Sub-Total	77.0%	53.7%	66.5%	30.9%	20.1%	41.4%	67.5%	59.8%	n/a
Barnet	9.3%	39.8%	5.8%	31.7%	18.1%	2.5%	2.0%	2.7%	n/a
Enfield	9.0%	2.3%	2.5%	0.4%	53.9%	6.4%	7.6%	19.0%	n/a
Edmonton	0.9%	0.6%	0.7%	0.0%	0.0%	0.7%	7.5%	13.5%	n/a
Waltham Forest	0.5%	0.0%	0.2%	1.3%	0.6%	0.7%	1.1%	2.3%	n/a
Hackney	0.3%	0.0%	0.5%	0.0%	0.2%	21.9%	6.4%	0.3%	n/a
Islington	1.6%	2.3%	17.3%	14.6%	1.6%	20.9%	5.5%	1.6%	n/a
Camden	0.5%	0.0%	1.6%	11.7%	0.0%	0.0%	0.0%	0.0%	n/a
Other Outflow	0.9%	1.3%	4.9%	9.4%	5.5%	5.5%	2.4%	0.8%	n/a
Other Sub-Total	23.0%	46.3%	33.5%	69.1%	79.9%	58.6%	32.5%	40.2%	n/a
TOTAL MARKET SHARE	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	n/a

Sources:

NEMS Household and Street Surveys 2012 and NLP adjustments

Table 5: Base Year Convenience Shopping Patterns £M (2014 Prices)

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Total Expenditure 2016	141.44	106.45	135.57	74.89	116.38	163.48	147.98	122.39		
Wood Green	63.65	0.53	6.91	0.67	13.38	6.38	13.32	15.67	6.34	126.86
Green Lanes	9.34	0.64	7.46	0.97	1.98	30.90	12.28	1.84	3.44	68.84
Muswell Hill/Crouch End	20.93	54.29	62.23	13.70	5.00	12.91	0.74	0.24	8.95	179.01
Bruce Grove/Tottenham High Road	1.27	0.21	2.71	1.50	0.93	0.82	44.39	42.84	4.98	99.66
West Green/Seven Sisters	0.00	0.00	0.00	0.00	0.00	2.13	11.39	1.59	0.80	15.91
Other/Local Shops	13.72	1.49	10.85	6.29	2.09	14.55	17.76	11.02	4.09	81.86
LB of Haringey Sub-Total	108.91	57.16	90.16	23.14	23.39	67.68	99.89	73.19	28.61	572.13
Barnet	13.15	42.37	7.86	23.74	21.07	4.09	2.96	3.30	n/a	118.54
Enfield	12.73	2.45	3.39	0.30	62.73	10.46	11.25	23.25	n/a	126.56
Edmonton	1.27	0.64	0.95	0.00	0.00	1.14	11.10	16.52	n/a	31.63
Waltham Forest	0.71	0.00	0.27	0.97	0.70	1.14	1.63	2.81	n/a	8.24
Hackney	0.42	0.00	0.68	0.00	0.23	35.80	9.47	0.37	n/a	46.97
Islington	2.26	2.45	23.45	10.93	1.86	34.17	8.14	1.96	n/a	85.23
Camden	0.71	0.00	2.17	8.76	0.00	0.00	0.00	0.00	n/a	11.64
Other Outflow	1.27	1.38	6.64	7.04	6.40	8.99	3.55	0.98	n/a	36.26
Other Sub-Total	32.53	49.29	45.42	51.75	92.99	95.80	48.09	49.20	n/a	465.07
TOTAL EXPENDITURE	141.44	106.45	135.57	74.89	116.38	163.48	147.98	122.39	n/a	1,037.19

Sources:

Tables 3 and 4

Table 6: Future 2019 Year Convenience Shopping Patterns £M (2014 Prices)

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Total Expenditure 2019	148.42	106.53	138.04	76.08	120.10	166.80	154.48	125.38		
Wood Green	66.79	0.53	7.04	0.68	13.81	6.51	13.90	16.05	6.60	131.91
Green Lanes	9.80	0.64	7.59	0.99	2.04	31.53	12.82	1.88	3.54	70.83
Muswell Hill/Crouch End	21.97	54.33	63.36	13.92	5.16	13.18	0.77	0.25	9.10	182.04
Bruce Grove/Tottenham High Road	1.34	0.21	2.76	1.52	0.96	0.83	46.34	43.88	5.15	103.00
West Green/Seven Sisters	0.00	0.00	0.00	0.00	0.00	2.17	11.90	1.63	0.83	16.52
Other/Local Shops	14.40	1.49	11.04	6.39	2.16	14.85	18.54	11.28	4.22	84.37
LB of Haringey Sub-Total	114.29	57.21	91.80	23.51	24.14	69.06	104.28	74.98	29.43	588.68
Barnet	13.80	42.40	8.01	24.12	21.74	4.17	3.09	3.39	n/a	120.71
Enfield	13.36	2.45	3.45	0.30	64.73	10.68	11.74	23.82	n/a	130.53
Edmonton	1.34	0.64	0.97	0.00	0.00	1.17	11.59	16.93	n/a	32.62
Waltham Forest	0.74	0.00	0.28	0.99	0.72	1.17	1.70	2.88	n/a	8.48
Hackney	0.45	0.00	0.69	0.00	0.24	36.53	9.89	0.38	n/a	48.17
Islington	2.37	2.45	23.88	11.11	1.92	34.86	8.50	2.01	n/a	87.10
Camden	0.74	0.00	2.21	8.90	0.00	0.00	0.00	0.00	n/a	11.85
Other Outflow	1.34	1.38	6.76	7.15	6.61	9.17	3.71	1.00	n/a	37.13
Other Sub-Total	34.14	49.32	46.24	52.57	95.96	97.75	50.21	50.40	n/a	476.58
TOTAL EXPENDITURE	148.42	106.53	138.04	76.08	120.10	166.80	154.48	125.38	n/a	1,065.26

Sources:

Tables 3 and 4

Table 7: Future 2022 Year Convenience Shopping Patterns £M (2014 Prices)

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Total Expenditure 2022	154.20	106.32	139.78	77.18	122.39	171.07	159.28	129.61		
Wood Green	69.39	0.53	7.13	0.69	14.07	6.67	14.34	16.59	6.81	136.23
Green Lanes	10.18	0.64	7.69	1.00	2.08	32.33	13.22	1.94	3.64	72.72
Muswell Hill/Crouch End	22.82	54.22	64.16	14.12	5.26	13.51	0.80	0.26	9.22	184.38
Bruce Grove/Tottenham High Road	1.39	0.21	2.80	1.54	0.98	0.86	47.78	45.36	5.31	106.23
West Green/Seven Sisters	0.00	0.00	0.00	0.00	0.00	2.22	12.26	1.68	0.85	17.02
Other/Local Shops	14.96	1.49	11.18	6.48	2.20	15.23	19.11	11.67	4.33	86.65
LB of Haringey Sub-Total	118.73	57.09	92.95	23.85	24.60	70.82	107.51	77.51	30.16	603.23
Barnet	14.34	42.31	8.11	24.47	22.15	4.28	3.19	3.50	n/a	122.34
Enfield	13.88	2.45	3.49	0.31	65.97	10.95	12.11	24.63	n/a	133.77
Edmonton	1.39	0.64	0.98	0.00	0.00	1.20	11.95	17.50	n/a	33.65
Waltham Forest	0.77	0.00	0.28	1.00	0.73	1.20	1.75	2.98	n/a	8.72
Hackney	0.46	0.00	0.70	0.00	0.24	37.47	10.19	0.39	n/a	49.45
Islington	2.47	2.45	24.18	11.27	1.96	35.75	8.76	2.07	n/a	88.91
Camden	0.77	0.00	2.24	9.03	0.00	0.00	0.00	0.00	n/a	12.04
Other Outflow	1.39	1.38	6.85	7.25	6.73	9.41	3.82	1.04	n/a	37.87
Other Sub-Total	35.47	49.22	46.83	53.33	97.79	100.25	51.77	52.10	n/a	486.76
TOTAL EXPENDITURE	154.20	106.32	139.78	77.18	122.39	171.07	159.28	129.61	n/a	1,089.99

Sources:

Tables 3 and 4

Table 8: Future 2027 Year Convenience Shopping Patterns £M (2014 Prices)

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Total Expenditure 2027	162.89	106.57	143.67	79.39	125.23	179.22	166.78	137.97		
Wood Green	73.30	0.53	7.33	0.71	14.40	6.99	15.01	17.66	7.15	143.09
Green Lanes	10.75	0.64	7.90	1.03	2.13	33.87	13.84	2.07	3.80	76.04
Muswell Hill/Crouch End	24.11	54.35	65.95	14.53	5.39	14.16	0.83	0.28	9.45	189.04
Bruce Grove/Tottenham High Road	1.47	0.21	2.87	1.59	1.00	0.90	50.03	48.29	5.60	111.96
West Green/Seven Sisters	0.00	0.00	0.00	0.00	0.00	2.33	12.84	1.79	0.89	17.86
Other/Local Shops	15.80	1.49	11.49	6.67	2.25	15.95	20.01	12.42	4.53	90.62
LB of Haringey Sub-Total	125.42	57.23	95.54	24.53	25.17	74.20	112.58	82.50	31.43	628.60
Barnet	15.15	42.41	8.33	25.17	22.67	4.48	3.34	3.73	n/a	125.27
Enfield	14.66	2.45	3.59	0.32	67.50	11.47	12.68	26.21	n/a	138.88
Edmonton	1.47	0.64	1.01	0.00	0.00	1.25	12.51	18.63	n/a	35.50
Waltham Forest	0.81	0.00	0.29	1.03	0.75	1.25	1.83	3.17	n/a	9.15
Hackney	0.49	0.00	0.72	0.00	0.25	39.25	10.67	0.41	n/a	51.79
Islington	2.61	2.45	24.86	11.59	2.00	37.46	9.17	2.21	n/a	92.34
Camden	0.81	0.00	2.30	9.29	0.00	0.00	0.00	0.00	n/a	12.40
Other Outflow	1.47	1.39	7.04	7.46	6.89	9.86	4.00	1.10	n/a	39.21
Other Sub-Total	37.46	49.34	48.13	54.86	100.06	105.02	54.20	55.46	n/a	504.54
TOTAL EXPENDITURE	162.89	106.57	143.67	79.39	125.23	179.22	166.78	137.97	n/a	1,133.15

Sources:

Tables 3 and 4

Table 9: Future 2032 Year Convenience Shopping Patterns £M (2014 Prices)

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Total Expenditure 2032	168.50	108.37	147.91	81.59	126.49	187.11	172.69	142.60		
Wood Green	75.83	0.54	7.54	0.73	14.55	7.30	15.54	18.25	7.38	147.67
Green Lanes	11.12	0.65	8.14	1.06	2.15	35.36	14.33	2.14	3.94	78.90
Muswell Hill/Crouch End	24.94	55.27	67.89	14.93	5.44	14.78	0.86	0.29	9.71	194.10
Bruce Grove/Tottenham High Road	1.52	0.22	2.96	1.63	1.01	0.94	51.81	49.91	5.79	115.78
West Green/Seven Sisters	0.00	0.00	0.00	0.00	0.00	2.43	13.30	1.85	0.93	18.51
Other/Local Shops	16.34	1.52	11.83	6.85	2.28	16.65	20.72	12.83	4.69	93.72
LB of Haringey Sub-Total	129.75	58.19	98.36	25.21	25.43	77.46	116.57	85.27	32.43	648.68
Barnet	15.67	43.13	8.58	25.86	22.90	4.68	3.45	3.85	n/a	128.12
Enfield	15.17	2.49	3.70	0.33	68.18	11.97	13.12	27.09	n/a	142.06
Edmonton	1.52	0.65	1.04	0.00	0.00	1.31	12.95	19.25	n/a	36.71
Waltham Forest	0.84	0.00	0.30	1.06	0.76	1.31	1.90	3.28	n/a	9.45
Hackney	0.51	0.00	0.74	0.00	0.25	40.98	11.05	0.43	n/a	53.95
Islington	2.70	2.49	25.59	11.91	2.02	39.11	9.50	2.28	n/a	95.60
Camden	0.84	0.00	2.37	9.55	0.00	0.00	0.00	0.00	n/a	12.75
Other Outflow	1.52	1.41	7.25	7.67	6.96	10.29	4.14	1.14	n/a	40.38
Other Sub-Total	38.76	50.18	49.55	56.38	101.07	109.64	56.13	57.32	n/a	519.02
TOTAL EXPENDITURE	168.50	108.37	147.91	81.59	126.49	187.11	172.69	142.60	n/a	1,167.70

Sources:

Tables 3 and 4

Table 10: Convenience Floorspace and Benchmark Turnovers (2014 Prices)

Centres	Store	Net Sales Floorspace Sq M	Convenience % Sales Floorspace	Convenience Floorspace Sq M Net	Turnover Density £ per Sq M	Total Convenience Turnover £M	
Wood Green	Sainsbury's, 54 High Road	1,378	85%	1,171	£11,690	£13.69	
	Morrison's, 201 High Road	2,697	80%	2,158	£10,849	£23.41	
	Iceland, Mayes Road/Brook Road	450	95%	428	£7,933	£3.39	
	Marks & Spencer Foodhall, 46 High Road	1,347	95%	1,280	£10,329	£13.22	
	Lidl, 88-96 High Road, Wood Green	1,323	85%	1,125	£7,723	£8.68	
	Sainsbury's Local, Unit 4, Hollywood Green, Wood Green	242	95%	230	£11,690	£2.69	
	Tesco Express, 1-3 High Road, Wood Green	228	95%	217	£11,058	£2.40	
	Tesco Express, 421-451 High Road, Wood Green	256	95%	243	£11,058	£2.69	
	Tesco Express, 646 Lordship Lane, Wood Green	238	95%	226	£11,058	£2.50	
	Sainsbury's Local, 421 Lordship Lane	162	95%	154	£11,690	£1.80	
	Other Metropolitan Centre Shops	3,300	100%	3,300	£8,000	£26.40	
	Wood Green Total		11,621		10,530		£100.87
	Green Lanes	Sainsbury's, Williamson Road, Arena Retail Park	4,935	60%	2,961	£11,690	£34.61
Iceland, 17-19 Grand Parade		629	95%	598	£7,933	£4.74	
Tesco Express, 8-9 Salisbury Parade		264	95%	251	£11,058	£2.77	
Other District Centre Shops		3,951	100%	3,951	£8,000	£31.61	
Green Lanes Total		9,779		7,760		£73.74	
Muswell Hill/Crouch End	Sainsbury's, 12 Fortis Green Road	1,386	90%	1,247	£11,690	£14.58	
	Marks & Spencer Simply Food, 126-138 Muswell Hill Broadway	720	95%	684	£10,329	£7.07	
	Little Waitrose, 390 Muswell Hill Broadway	247	95%	235	£11,665	£2.74	
	Other Muswell Hill District Centre Shops	1,852	100%	1,852	£7,000	£12.96	
	Budgens, 23 The Broadway	904	95%	859	£8,000	£6.87	
	Marks & Spencer Simply Food, The Exchange, 71 Crouch End Hill	231	95%	219	£10,329	£2.27	
	Tesco Express, 25 The Broadway	193	95%	183	£11,058	£2.03	
	Little Waitrose, 35-39 The Broadway, Crouch End	500	95%	475	£11,665	£5.54	
	Sainsbury's Local, 175-179 Stroud Green Road, Crouch End	297	95%	282	£11,690	£3.30	
	Tesco Express, 46-50 High Street, Hornsey	256	95%	243	£11,058	£2.69	
	Other Crouch End District Centre Shops	2,467	100%	2,467	£8,000	£19.74	
	Muswell Hill/Crouch End Total		9,053		8,747		£79.78
Bruce Grove/ Tottenham High Road	Iceland, 522-528 High Road	560	95%	532	£7,933	£4.22	
	Asda, 490 High Road, Tottenham	1,212	80%	970	£15,213	£14.75	
	Turkish Food Centre, 678-672 Tottenham High Road	484	90%	436	£7,000	£3.05	
	Sainsbury's, Northumberland Park, High Road	6,536	60%	3,922	£11,690	£45.84	
	Sainsbury's Local, 669-673 High Road, Tottenham	164	95%	156	£11,690	£1.82	
	Tesco Express, Hale Village, Ferry Lane, Tottenham	250	95%	238	£11,058	£2.63	
	Aldi, 570-592, High Road, Tottenham	899	85%	764	£11,557	£8.83	
	Lidl, Tottenham Hale RP	1,354	80%	1,083	£7,723	£8.37	
	Spar PFS, 335-337 White Hart Lane	136	98%	133	£8,000	£1.07	
	Other District Centre Shops	1,709	100%	1,709	£8,000	£13.67	
	Tottenham High Road/Bruce Grove Total		13,304		9,942		£104.25
West Green Road/ Seven Sisters Road	Tesco, 230 High Road	4,109	65%	2,671	£11,058	£29.53	
	Lidl, 269 Seven Sisters Road	497	85%	422	£7,723	£3.26	
	Tesco Express, West Green Road Tottenham	256	95%	243	£11,058	£2.69	
	Sainsbury's Local, 335-337 West Green Road	255	95%	242	£11,690	£2.83	
	Other District Centre Shops	1,630	100%	1,630	£8,000	£13.04	
West Green Road/Seven Sisters Road Total		6,747		5,209		£51.36	
Other Haringey	Tesco Express, 127-133 Bounds Green	256	95%	243	£11,058	£2.69	
	Sainsbury's Local, 260-268 Archway Road	171	95%	162	£11,690	£1.90	
	Tesco Express, High Street, Highgate	138	95%	131	£11,058	£1.45	
	Other Local Shops	10,000	100%	10,000	£8,000	£80.00	
Other Total		10,565		10,537		£86.04	
TOTAL	TOTAL	61,069		52,725	£9,408	£496.02	
Comparison Sales Floorspace in Food Stores Sq M Net						8,344	

Sources: ORC StorePoint Fourth Quarter 2014, Experian Goald for Wood Green 2015 and Mintel Food Store Sales Densities

Table 11: Summary of Convenience Expenditure 2014 to 2032

Centre	2016	2019	2022	2027	2032
Available Expenditure					
Wood Green	£126.86	£131.91	£136.23	£143.09	£147.67
Green Lanes	£68.84	£70.83	£72.72	£76.04	£78.90
Muswell Hill/Crouch End	£179.01	£182.04	£184.38	£189.04	£194.10
Bruce Grove/Tottenham High Road	£99.66	£103.00	£106.23	£111.96	£115.78
West Green/Seven Sisters	£15.91	£16.52	£17.02	£17.86	£18.51
Other/Local Shops	£81.86	£84.37	£86.65	£90.62	£93.72
Total	£572.13	£588.68	£603.23	£628.60	£648.68
Turnover of Existing Floorspace					
Wood Green	£100.87	£100.87	£100.87	£100.87	£100.87
Green Lanes	£73.74	£73.74	£73.74	£73.74	£73.74
Muswell Hill/Crouch End	£79.78	£79.78	£79.78	£79.78	£79.78
Bruce Grove/Tottenham High Road	£104.25	£104.25	£104.25	£104.25	£104.25
West Green/Seven Sisters	£51.36	£51.36	£51.36	£51.36	£51.36
Other/Local Shops	£86.04	£86.04	£86.04	£86.04	£86.04
Total	£496.02	£496.02	£496.02	£496.02	£496.02
Surplus Expenditure					
Wood Green	£25.99	£31.05	£35.36	£42.22	£46.80
Green Lanes	-£4.90	-£2.91	-£1.02	£2.30	£5.16
Muswell Hill/Crouch End	£99.23	£102.27	£104.60	£109.26	£114.33
Bruce Grove/Tottenham High Road	-£4.59	-£1.24	£1.99	£7.71	£11.53
West Green/Seven Sisters	-£35.45	-£34.84	-£34.33	-£33.50	-£32.85
Other/Local Shops	-£4.18	-£1.67	£0.61	£4.58	£7.68
Total	£76.11	£92.66	£107.21	£132.58	£152.66

Sources:

Tables 5 to 10

Table 12: Convenience Floorspace Capacity

Centre	2019	2022	2027	2032
Sales Density Per Sq.M Net	£9,408	£9,408	£9,408	£9,408
Sales Floorspace Capacity Sq.M Net				
Wood Green	2,763	3,300	3,759	4,488
Green Lanes	-520	-309	-108	245
Muswell Hill/Crouch End	10,548	10,870	11,118	11,613
Bruce Grove/Tottenham High Road	-488	-132	211	820
West Green/Seven Sisters	-3,768	-3,703	-3,649	-3,561
Other/Local Shops	-444	-177	65	487
Total	8,090	9,849	11,396	14,092
Gross Floorspace Capacity Sq.M				
Wood Green	3,683	4,400	5,012	5,984
Green Lanes	-694	-412	-144	326
Muswell Hill/Crouch End	14,064	14,494	14,824	15,485
Bruce Grove/Tottenham High Road	-650	-176	282	1,093
West Green/Seven Sisters	-5,024	-4,937	-4,866	-4,748
Other/Local Shops	-593	-236	87	649
Total	10,786	13,132	15,195	18,790

Sources: Table 11

Appendix 3 Comparison Goods Assessment

Table 1: Study Area Population

Expenditure Per Capita	2011	2016	2019	2022	2027	2032
1 - Wood Green	63,934	68,143	71,742	74,934	79,260	82,279
2 - Muswell Hill	41,756	44,172	44,349	44,498	44,662	45,575
3 - Crouch End	52,924	55,874	57,076	58,105	59,804	61,782
4 - Fortis Green/Highgate	29,181	31,251	31,850	32,486	33,460	34,506
5 - Arnos Grove/Palmers Green	48,369	50,978	52,778	54,074	55,403	56,155
6 - Green Lanes/Stamford Hill	77,850	83,805	85,792	88,462	92,794	97,217
7 - Bruce Grove/Tottenham High Road	78,020	85,600	89,655	92,936	97,438	101,246
8 - Tottenham/White Hart Lane	67,959	71,844	73,843	76,743	81,798	84,839
	459,993	491,666	507,085	522,238	544,619	563,599

Sources - Cenus of Population 2011.

GLA 2014 round ward population projections - SHLAA Based

Table 2: Comparison Goods Expenditure Per Capita (2014 Prices)

Zone	2016	2019	2022	2027	2032
1 - Wood Green	£3,157	£3,378	£3,690	£4,335	£5,098
2 - Muswell Hill	£3,962	£4,239	£4,631	£5,440	£6,397
3 - Crouch End	£3,834	£4,103	£4,482	£5,265	£6,192
4 - Fortis Green/Highgate	£3,895	£4,168	£4,552	£5,348	£6,289
5 - Arnos Grove/Palmers Green	£3,870	£4,142	£4,524	£5,314	£6,250
6 - Green Lanes/Stamford Hill	£2,910	£3,114	£3,402	£3,996	£4,700
7 - Bruce Grove/Tottenham High Road	£2,443	£2,614	£2,855	£3,354	£3,945
8 - Tottenham/White Hart Lane	£2,326	£2,489	£2,719	£3,194	£3,757

Sources:

Experian local estimates for 2014 comparison goods expenditure per capita

(Excluding special forms of trading- 11.2% in 2014, 14.4% in 2019, 15.2% in 2022, 14.9% in 2027 and 14.5% in 2032

Experian Business Strategies - recommended forecast growth rates

(5.3% in 2015, 3.2% in 2016 and 2.9% per annum in 2017 and 3.0% in 2018 and beyond)

Table 3: Total Available Comparison Goods Expenditure (£M - 2014 Prices)

Zone	2016	2019	2022	2027	2032
1 - Wood Green	215.14	242.37	276.52	343.58	419.47
2 - Muswell Hill	175.00	188.01	206.05	242.95	291.56
3 - Crouch End	214.24	234.20	260.42	314.86	382.54
4 - Fortis Green/Highgate	121.71	132.74	147.89	178.93	217.01
5 - Arnos Grove/Palmers Green	197.30	218.59	244.62	294.42	350.96
6 - Green Lanes/Stamford Hill	243.90	267.18	300.92	370.80	456.88
7 - Bruce Grove/Tottenham High Road	209.11	234.37	265.37	326.83	399.40
8 - Tottenham/White Hart Lane	167.13	183.82	208.67	261.27	318.70
Total	£1,543.53	£1,701.29	£1,910.45	£2,333.64	£2,836.51

Sources:

Table 1 and Table 2

Table 4: Base Year Comparison Shopping Penetration Rates 2016

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	% Inflow
Wood Green	25.6%	2.7%	8.4%	1.8%	13.3%	12.4%	24.0%	24.0%	20%
Green Lanes	2.4%	0.8%	3.9%	1.2%	1.6%	8.0%	3.5%	0.6%	5%
Muswell Hill/Crouch End	9.1%	25.2%	19.9%	7.0%	2.2%	5.2%	0.7%	1.4%	5%
Bruce Grove/Tottenham/Tottenham Hale	5.8%	1.6%	4.7%	3.4%	2.7%	12.0%	32.0%	18.9%	15%
West Green/Seven Sisters	0.3%	0.2%	0.7%	0.0%	0.0%	1.5%	2.1%	0.3%	5%
Other/Local Shops	1.7%	0.2%	0.3%	0.0%	0.0%	5.2%	0.7%	0.5%	2%
LB of Haringey Sub-Total	44.9%	30.7%	37.9%	13.4%	19.8%	44.3%	63.0%	45.7%	n/a
Enfield	5.1%	1.1%	1.4%	1.1%	11.3%	1.0%	6.0%	20.5%	n/a
Edmonton Green	3.7%	0.8%	0.3%	0.6%	2.8%	3.7%	5.4%	11.7%	n/a
Brent Cross	10.6%	24.6%	18.9%	29.5%	15.9%	5.5%	2.9%	2.3%	n/a
Stratford	0.2%	0.2%	0.2%	0.5%	0.4%	1.3%	1.1%	0.3%	n/a
Central London	17.6%	13.6%	23.2%	21.5%	13.3%	22.5%	11.2%	7.9%	n/a
Other Outflow	17.9%	29.0%	18.1%	33.4%	36.5%	21.7%	10.4%	11.6%	n/a
Other Sub-Total	55.1%	69.3%	62.1%	86.6%	80.2%	55.7%	37.0%	54.3%	n/a
TOTAL MARKET SHARE	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	n/a

Sources:

NEMS Household and Street Surveys 2012 and NLP adjustments

Table 5: Base Year Comparison Shopping Patterns £M (2014 Prices)

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Total Expenditure 2016	215.14	175.00	214.24	121.71	197.30	243.90	209.11	167.13		
Wood Green	55.08	4.72	18.00	2.19	26.24	30.24	50.19	40.11	56.69	283.46
Green Lanes	5.16	1.40	8.36	1.46	3.16	19.51	7.32	1.00	2.49	49.86
Muswell Hill/Crouch End	19.58	44.10	42.63	8.52	4.34	12.68	1.46	2.34	7.14	142.80
Bruce Grove/Tottenham/Tottenham Hale	12.48	2.80	10.07	4.14	5.33	29.27	66.92	31.59	28.69	191.28
West Green/Seven Sisters	0.65	0.35	1.50	0.00	0.00	3.66	4.39	0.50	0.58	11.63
Other/Local Shops	3.66	0.35	0.64	0.00	0.00	12.68	1.46	0.84	0.40	20.03
LB of Haringey Sub-Total	96.60	53.72	81.20	16.31	39.07	108.05	131.74	76.38	96.00	699.06
Enfield	10.97	1.92	3.00	1.34	22.30	2.44	12.55	34.26	n/a	88.78
Edmonton Green	7.96	1.40	0.64	0.73	5.52	9.02	11.29	19.55	n/a	56.13
Brent Cross	22.80	43.05	40.49	35.90	31.37	13.41	6.06	3.84	n/a	196.94
Stratford	0.43	0.35	0.43	0.61	0.79	3.17	2.30	0.50	n/a	8.58
Central London	37.86	23.80	49.70	26.17	26.24	54.88	23.42	13.20	n/a	255.28
Other Outflow	38.51	50.75	38.78	40.65	72.02	52.93	21.75	19.39	n/a	334.76
Other Sub-Total	118.54	121.27	133.04	105.40	158.24	135.85	77.37	90.75	n/a	940.47
TOTAL EXPENDITURE	215.14	175.00	214.24	121.71	197.30	243.90	209.11	167.13	n/a	1,639.53

Sources:

Tables 3 and 4

Table 6: Future 2019 Year Comparison Shopping Patterns £M (2014 Prices)

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Total Expenditure 2019	242.37	188.01	234.20	132.74	218.59	267.18	234.37	183.82		
Wood Green	62.05	5.08	19.67	2.39	29.07	33.13	56.25	44.12	62.94	314.69
Green Lanes	5.82	1.50	9.13	1.59	3.50	21.37	8.20	1.10	2.75	54.97
Muswell Hill/Crouch End	22.06	47.38	46.60	9.29	4.81	13.89	1.64	2.57	7.80	156.05
Bruce Grove/Tottenham/Tottenham Hale	14.06	3.01	11.01	4.51	5.90	32.06	75.00	34.74	31.82	212.11
West Green/Seven Sisters	0.73	0.38	1.64	0.00	0.00	4.01	4.92	0.55	0.64	12.87
Other/Local Shops	4.12	0.38	0.70	0.00	0.00	13.89	1.64	0.92	0.44	22.09
LB of Haringey Sub-Total	108.83	57.72	88.76	17.79	43.28	118.36	147.65	84.01	106.39	772.79
Enfield	12.36	2.07	3.28	1.46	24.70	2.67	14.06	37.68	n/a	98.29
Edmonton Green	8.97	1.50	0.70	0.80	6.12	9.89	12.66	21.51	n/a	62.14
Brent Cross	25.69	46.25	44.26	39.16	34.76	14.70	6.80	4.23	n/a	215.84
Stratford	0.48	0.38	0.47	0.66	0.87	3.47	2.58	0.55	n/a	9.47
Central London	42.66	25.57	54.33	28.54	29.07	60.12	26.25	14.52	n/a	281.06
Other Outflow	43.39	54.52	42.39	44.34	79.78	57.98	24.37	21.32	n/a	368.09
Other Sub-Total	133.55	130.29	145.44	114.95	175.31	148.82	86.72	99.82	n/a	1,034.89
TOTAL EXPENDITURE	242.37	188.01	234.20	132.74	218.59	267.18	234.37	183.82	n/a	1,807.68

Sources:

Tables 3 and 4

Table 7: Future 2022 Year Comparison Shopping Patterns £M (2014 Prices)

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Total Expenditure 2022	276.52	206.05	260.42	147.89	244.62	300.92	265.37	208.67		
Wood Green	70.79	5.56	21.88	2.66	32.53	37.31	63.69	50.08	71.13	355.63
Green Lanes	6.64	1.65	10.16	1.77	3.91	24.07	9.29	1.25	3.09	61.83
Muswell Hill/Crouch End	25.16	51.93	51.82	10.35	5.38	15.65	1.86	2.92	8.69	173.76
Bruce Grove/Tottenham/Tottenham Hale	16.04	3.30	12.24	5.03	6.60	36.11	84.92	39.44	35.94	239.62
West Green/Seven Sisters	0.83	0.41	1.82	0.00	0.00	4.51	5.57	0.63	0.73	14.50
Other/Local Shops	4.70	0.41	0.78	0.00	0.00	15.65	1.86	1.04	0.50	24.94
LB of Haringey Sub-Total	124.16	63.26	98.70	19.82	48.43	133.31	167.18	95.36	120.07	870.29
Enfield	14.10	2.27	3.65	1.63	27.64	3.01	15.92	42.78	n/a	110.99
Edmonton Green	10.23	1.65	0.78	0.89	6.85	11.13	14.33	24.41	n/a	70.28
Brent Cross	29.31	50.69	49.22	43.63	38.89	16.55	7.70	4.80	n/a	240.79
Stratford	0.55	0.41	0.52	0.74	0.98	3.91	2.92	0.63	n/a	10.66
Central London	48.67	28.02	60.42	31.80	32.53	67.71	29.72	16.48	n/a	315.35
Other Outflow	49.50	59.76	47.14	49.39	89.29	65.30	27.60	24.21	n/a	412.17
Other Sub-Total	152.36	142.80	161.72	128.07	196.19	167.61	98.19	113.31	n/a	1,160.24
TOTAL EXPENDITURE	276.52	206.05	260.42	147.89	244.62	300.92	265.37	208.67	n/a	2,030.52

Sources:

Tables 3 and 4

Table 8: Future 2027 Year Comparison Shopping Patterns £M (2014 Prices)

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Total Expenditure 2027	343.58	242.95	314.86	178.93	294.42	370.80	326.83	261.27		
Wood Green	87.96	6.56	26.45	3.22	39.16	45.98	78.44	62.71	87.62	438.08
Green Lanes	8.25	1.94	12.28	2.15	4.71	29.66	11.44	1.57	3.79	75.79
Muswell Hill/Crouch End	31.27	61.22	62.66	12.52	6.48	19.28	2.29	3.66	10.49	209.87
Bruce Grove/Tottenham/Tottenham Hale	19.93	3.89	14.80	6.08	7.95	44.50	104.59	49.38	44.31	295.42
West Green/Seven Sisters	1.03	0.49	2.20	0.00	0.00	5.56	6.86	0.78	0.89	17.82
Other/Local Shops	5.84	0.49	0.94	0.00	0.00	19.28	2.29	1.31	0.62	30.76
LB of Haringey Sub-Total	154.27	74.58	119.33	23.98	58.30	164.27	205.90	119.40	147.72	1,067.74
Enfield	17.52	2.67	4.41	1.97	33.27	3.71	19.61	53.56	n/a	136.72
Edmonton Green	12.71	1.94	0.94	1.07	8.24	13.72	17.65	30.57	n/a	86.86
Brent Cross	36.42	59.76	59.51	52.78	46.81	20.39	9.48	6.01	n/a	291.17
Stratford	0.69	0.49	0.63	0.89	1.18	4.82	3.60	0.78	n/a	13.07
Central London	60.47	33.04	73.05	38.47	39.16	83.43	36.60	20.64	n/a	384.86
Other Outflow	61.50	70.45	56.99	59.76	107.46	80.46	33.99	30.31	n/a	500.93
Other Sub-Total	189.31	168.36	195.53	154.95	236.13	206.54	120.93	141.87	n/a	1,413.61
TOTAL EXPENDITURE	343.58	242.95	314.86	178.93	294.42	370.80	326.83	261.27	n/a	2,481.36

Sources:

Tables 3 and 4

Table 9: Future 2032 Year Comparison Shopping Patterns £M (2014 Prices)

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Total Expenditure 2032	419.47	291.56	382.54	217.01	350.96	456.88	399.40	318.70		
Wood Green	107.38	7.87	32.13	3.91	46.68	56.65	95.85	76.49	106.74	533.71
Green Lanes	10.07	2.33	14.92	2.60	5.62	36.55	13.98	1.91	4.63	92.61
Muswell Hill/Crouch End	38.17	73.47	76.13	15.19	7.72	23.76	2.80	4.46	12.72	254.42
Bruce Grove/Tottenham/Tottenham Hale	24.33	4.66	17.98	7.38	9.48	54.83	127.81	60.23	54.12	360.82
West Green/Seven Sisters	1.26	0.58	2.68	0.00	0.00	6.85	8.39	0.96	1.09	21.81
Other/Local Shops	7.13	0.58	1.15	0.00	0.00	23.76	2.80	1.59	0.76	37.76
LB of Haringey Sub-Total	188.34	89.51	144.98	29.08	69.49	202.40	251.62	145.64	180.06	1,301.12
Enfield	21.39	3.21	5.36	2.39	39.66	4.57	23.96	65.33	n/a	165.87
Edmonton Green	15.52	2.33	1.15	1.30	9.83	16.90	21.57	37.29	n/a	105.89
Brent Cross	44.46	71.72	72.30	64.02	55.80	25.13	11.58	7.33	n/a	352.35
Stratford	0.84	0.58	0.77	1.09	1.40	5.94	4.39	0.96	n/a	15.96
Central London	73.83	39.65	88.75	46.66	46.68	102.80	44.73	25.18	n/a	468.27
Other Outflow	75.08	84.55	69.24	72.48	128.10	99.14	41.54	36.97	n/a	607.11
Other Sub-Total	231.13	202.05	237.56	187.93	281.47	254.48	147.78	173.05	n/a	1,715.45
TOTAL EXPENDITURE	419.47	291.56	382.54	217.01	350.96	456.88	399.40	318.70	n/a	3,016.57

Sources:

Tables 3 and 4

Table 10: Summary of Comparison Expenditure 2014 to 2032

Centre	2016	2019	2022	2027	2032
<i>Available Expenditure</i>					
Wood Green	£283.46	£314.69	£355.63	£438.08	£533.71
Green Lanes	£49.86	£54.97	£61.83	£75.79	£92.61
Muswell Hill/Crouch End	£142.80	£156.05	£173.76	£209.87	£254.42
Bruce Grove/Tottenham/Tottenham Hale	£191.28	£212.11	£239.62	£295.42	£360.82
West Green/Seven Sisters	£11.63	£12.87	£14.50	£17.82	£21.81
Other/Local Shops	£20.03	£22.09	£24.94	£30.76	£37.76
Total	£699.06	£772.79	£870.29	£1,067.74	£1,301.12
<i>Turnover of Existing Floorspace</i>					
Wood Green	£283.46	£312.97	£332.12	£366.69	£404.86
Green Lanes	£49.86	£55.05	£58.42	£64.50	£71.22
Muswell Hill/Crouch End	£142.80	£157.66	£167.31	£184.72	£203.95
Bruce Grove/Tottenham/Tottenham Hale	£191.28	£211.18	£224.11	£247.44	£273.19
West Green/Seven Sisters	£11.63	£12.84	£13.62	£15.04	£16.61
Other/Local Shops	£20.03	£22.12	£23.47	£25.91	£28.61
Total	£699.06	£771.82	£819.06	£904.31	£998.43
<i>Surplus Expenditure</i>					
Wood Green	n/a	£1.73	£23.51	£71.39	£128.85
Green Lanes	n/a	-£0.08	£3.41	£11.28	£21.39
Muswell Hill/Crouch End	n/a	-£1.61	£6.45	£25.14	£50.47
Bruce Grove/Tottenham/Tottenham Hale	n/a	£0.92	£15.51	£47.99	£87.63
West Green/Seven Sisters	n/a	£0.03	£0.88	£2.78	£5.20
Other/Local Shops	n/a	-£0.02	£1.47	£4.85	£9.15
Total	n/a	£0.97	£51.23	£163.43	£302.69

Sources:

Tables 5 to 9

Table 11: Comparison Floorspace Capacity 2014 to 2032















Centre	2016	2019	2022	2027	2032
Sales Density Per Sq.M Net	£6,000	£6,367	£6,757	£7,460	£8,237
Sales Floorspace Capacity Sq.M Net					
Wood Green	n/a	271	3,479	9,570	15,644
Green Lanes	n/a	-12	505	1,513	2,597
Muswell Hill/Crouch End	n/a	-253	955	3,370	6,127
Bruce Grove/Tottenham/Tottenham Hale	n/a	145	2,295	6,432	10,638
West Green/Seven Sisters	n/a	5	130	373	631
Other/Local Shops	n/a	-4	218	650	1,111
Total	n/a	152	7,581	21,907	36,749
Gross Floorspace Capacity Sq.M					
Wood Green	n/a	362	4,639	12,760	20,858
Green Lanes	n/a	-16	673	2,017	3,463
Muswell Hill/Crouch End	n/a	-337	1,273	4,494	8,170
Bruce Grove/Tottenham/Tottenham Hale	n/a	193	3,060	8,576	14,185
West Green/Seven Sisters	n/a	6	173	497	842
Other/Local Shops	n/a	-5	290	866	1,481
Total	n/a	203	10,108	29,210	48,999

Sources: Table 10



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