Nathaniel Lichfield and Partners

Planning Design Economics

LONDON BOROUGH OF HARINGEY

RETAIL AND TOWN CENTRES STUDY

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APPENDICES

GLOSSARY OF TERMS

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.
EGi	A published source of information providing known retail and leisure operators' space requirements in towns across the country.
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

The Study

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, namely Wood Green, Muswell Hill, Crouch End, Green Lanes, Bruce Grove/Tottenham High Road and West Green Road/Seven Sisters in line with the requirements of PPS6: Planning for Town Centres (March 2005).

1.2 A key objective of the study will be to provide robust evidence to support the Council in formulating policies on retail provision in the Local Development Framework, and subsequent Development Control policies and Site Specific Allocation documents. The key objectives are to:

- assess the need for retail floorspace up to 2011, 2016 and 2021, reflecting social and demographic changes; and
- provide a qualitative assessment of the range and distribution of shopping destinations (including 1 Metropolitan Centre, 5 District Centres and 38 Local Centres).

Content of the Report

1.3 Section 2.0 provides an overview of retail trends. Section 3.0 provides an overview of the national, regional and local planning policy context. Section 4.0 provides a description of the shopping hierarchy in Haringey and the surrounding area.

1.4 Sections 5.0 summarises the results of a household survey and Section 6.0 summarises the results of the in-street survey. Sections 7.0 to 12.0 provide an audit of main centres and Section 13.0 provides an assessment of the Local Centres.

1.5 Sections 14.0 set out an analysis of shopping needs within the Borough and Section 15.0 sets out the recommendations and conclusions.

2.0 OVERVIEW OF RETAIL TRENDS

2.1 An assessment of the need for retail facilities in Haringey is set out in Section 14 of this report. In the section below, we provide an overview of recent trends within the retail sector.

Retail Trends

2.2 Past 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, particularly for comparison goods. In the past expenditure growth has fuelled the growth in retail floorspace, including major out-of-centre development particularly in the 1980's and 1990. Continuation of these past trends is likely to lead to a need for further retail floorspace.

2.3 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 the London Borough of Haringey. 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.

2.4 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. However, there is still uncertainty about its longer-term prospects and the potential effects on the high street.

2.5 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. For example, some major food operators have introduced smaller store formats capable of being accommodated within town centres, such as the Tesco *Metro*, Sainsbury *Central/Local* store and Marks and Spencer's *Simply Foods* formats. Food operators have also entered the local convenience store market, for example *Tesco Express* store and convenience stores linked with petrol filling stations. The entrance of European discount food operators such as Aldi, Lidl and Netto has also been rapid during the last decade.

2.6 Food store operators have also commenced a programme of store extensions, particularly Tesco, Sainsbury's and Asda. These operators, faced with limited growth in food expenditure, have attempted to increase the sale of non-food products within their food stores, including clothing and electrical goods.

2.7 Comparison retailers have also responded to recent market conditions. The bulky goods retail warehouse sector has rationalised and there have been a number of mergers. For example there are fewer DIY operators, following the acquisition of Do It All, Great Mills and Wickes by Focus DIY. B&Q and Homebase developed very large *'category killer'* retail warehouses (some exceeding 10,000 sq m gross), but more recently have scaled down their stores. Other traditional high street retailers have sought large out-of-centre stores, for example Boots, TK Maxx and Poundstretcher. Matalan has also opened numerous discount clothing stores across the country. Sports clothing retail warehouses including JJB Sports and Decathlon have also expanded out-of-centre. These trends have already been evident across the Country and in London. However within Inner London, where land values are relatively high and the availability of land development sites is limited, the development of large retail warehouses and retail parks has been more restricted than in outer London Boroughs.

2.8 Within town centres, some high street multiple comparison retailers have also changed their format. High street national multiples have increasingly sought larger modern shop units (over 200 sq m - 2,150 sq ft) with an increasing polarisation of activity into the larger regional and sub-regional centres. The continuation of these trends may also influence future operator requirements in the Borough, with some operators looking for new premises in larger centres e.g. Central London, Stratford and Brent Cross.

2.9 Factory outlet centres have been developed across the country as an alternative to fashion shops within town centres. These developments are usually large and can provide over 10,000 sq m of comparison retailing, focusing primarily on fashion items and clothing, offering designer clothing at discounted prices. A number of large factory outlet developments have emerged across Great Britain and draw from a wide catchment area.

Leisure Trends

2.10 The demand for commercial leisure facilities has increased significantly during the last 20 years. The growth in the commercial leisure sector was particularly strong during the late 1980s and again in the mid 1990s and in early 2000. Average household expenditure on leisure services increased by approximately 12% between 2001 and 2006 (source: Family Expenditure Survey). The latest (2006) average household expenditure on leisure services is over £3,450 per annum. However, many analysts consider that the commercial leisure market has now reached saturation in some sub-sectors.

2.11 The mid-1990s saw the expansion of major *leisure parks.* These leisure parks are generally anchored by a large multiplex cinema and offer other facilities such as ten-pin bowling, bingo, nightclubs, health/fitness clubs, themed destination restaurants, pub/restaurants, children's nurseries and budget hotels. Commercial leisure facilities have typically been located on the edge of town centres or out-of-centre, with good road access. Many leisure uses have also emerged on retail warehouse parks.

2.12 The cinema market remains an important sector because cinemas often anchor leisure developments, providing footfall for other uses. Growth in this sector has slowed significantly in recent years with many areas reaching saturation levels, however, it is anticipated by Dodona Research (Cinemagoing 16 March 2007) that 2007 would be a better year as the emphasis shifts from consolidation to physical expansion. Other sub-sectors have remained strong in recent years, in particular the private health and fitness market, with a number of multiple operators seeking premises across the UK, e.g. LA Fitness, Fitness First and Esporta. Nevertheless, the health and fitness sector is reaching saturation point in some areas.

3.0 PLANNING POLICY CONTEXT

National Policy

3.1 PPS6: Planning for Town Centres (March 2005) sets out the Government's policies on town centres, retail, commercial leisure and other town centre uses.

3.2 The Government's key objective for town centres (this covers city, town, district and local centres) is to promote their vitality and viability by planning for growth and development of existing centres and promoting and enhancing existing centres, by focusing development in such centres and encouraging a wide range of services in a good environment, accessible to all.

3.3 Other Government objectives that need to be taken account of in the context of the key objective are set out in paragraph 1.4:

- Enhancing consumer choice by making provision for a range of shopping, leisure and local services, which allow genuine choice to meet the needs of the entire community and particularly socially excluded groups;
- Supporting efficient, competitive and innovative retail, leisure, tourism and other sectors, with improving productivity; and
- Improving accessibility, ensuring that existing or new development is, or will be, accessible and well served by a choice of means of transport.

3.4 Regional planning bodies (RPB's) and local planning authorities (LPAs) are advised in paragraph 1.6 to implement the Government's objectives for town centres, by planning positively for their growth and development. They should therefore:

- develop a hierarchy and network of centres;
- assess the need for further main town centre uses and ensure there is capacity to accommodate them;
- focus development in, and plan for the expansion of, existing centres as appropriate, and at the local level identify appropriate sites in development plan documents;
- promote town centre management, creating partnerships to develop, improve and maintain the town centre and manage the evening and night-time economy; and
- regularly monitor and review the impact and effectiveness of their policies for promoting vital and viable town centres.

3.5 Paragraph 2.1 states that in order to deliver the Government's key objective, RPB's and LPA's should actively promote growth and manage change in town centres, define the network and a hierarchy of centres, each performing their appropriate role to meet the needs of their catchment, and adopt a pro-active, plan-led approach to planning for town centres, through regional and local planning.

3.6 The main town centre uses to which PPS6 applies are outlined in paragraph 1.8:

- retail (including warehouse clubs and factory outlet centres);
- leisure, entertainment facilities and the more intensive sport and recreation uses (including cinemas, restaurants, drive-through restaurants, bars and pubs, night-clubs, casinos, health and fitness centres, indoor bowling centres and bingo halls);
- offices, both commercial and those of public bodies; and
- arts, culture and tourism (theatres, museums, galleries and concert halls, hotels and conference facilities).

3.7 PPS6, paragraph 2.15 to 2.17 offers specific guidance to LPA's on the role of plans at local level, including the need to work in conjunction with stakeholders and the community to:

- assess the need for new floorspace for retail, leisure and other main town centre uses, taking account of both quantitative and qualitative considerations;
- identify deficiencies in provision, assess the capacity of existing centres to accommodate new development, including, where appropriate, the scope for extending the primary shopping area and/or town centre, and identify centres in decline where changes need to be made;
- identify centres within their area where development will be focused, as well as the need for any new centres of local importance, and development strategies for developing and strengthening centres within their area;
- define the extent of the primary shopping area and the town centre, for the centre in their area on their proposal map;
- review all existing allocations and reallocate sites which do not comply with this policy statement;
- identify and allocate sites in accordance with the considerations on sight selection and land assembly e.g. assessment of need, appropriate scale of development, sequential approach, impact and accessibility;
- develop spatial policies and proposals to promote and secure investment in deprived areas by strengthening and/or identifying opportunities for growth of existing centres, and to seek to improve access to local facilities; and

- set out criteria based policies, in accordance with this policy statement, for assessing and locating new development proposals, including development on sites not allocated in development plan documents.

3.8 PPS6 also indicates that in addition to defining the extent of the primary shopping area for their local centres, LPA's may distinguish between primary and secondary frontages. Primary frontages should contain a high proportion of retail uses, while secondary frontages provide opportunities for flexibility and diversity of uses. Policy should make clear which uses will be permitted in such locations.

Demonstrating Need for development

3.9 PPS6 requires Councils to undertake assessments of need for other non-retail town centre uses, i.e. commercial leisure and office development. This study assesses the retail and leisure needs of the London Borough of Haringey.

3.10 PPS6 states in paragraph 2.33 that:

> *'in assessing the need and capacity for additional retail and leisure development, local planning authorities should place greater weight on quantitative need for additional floorspace for the specific types of retail and leisure developments. However local planning authorities should also take account of qualitative considerations. In deprived areas which lack access to a range of services and facilities, and there will be clear and demonstrable benefits in identifying sites for appropriate development to serve the communities in these areas, additional weight should be given to meeting these qualitative needs.'*

3.11 In assessing quantitative need for additional development, local planning authorities should assess the likely future demand for additional retail floorspace, having regard to a realistic assessment of the existing forecast population levels, forecast expenditure for specific classes of goods to be sold, within the broad categories of comparison and convenience goods and forecast improvements in productivity in the use of floorspace.

3.12 With regards to assessing the qualitative need for additional development, paragraph 2.35 states that a key consideration will be to provide for consumer choice, ensuring that:

- an appropriate distribution of locations is achieved, subject to the key objective of promoting the vitality and viability of town centres and the application of the sequential approach, to improve accessibility for the whole community; and

- provision is made for a range of sites for shopping, leisure and local services, which allow genuine choice to meet the needs of the whole community, particularly the needs of those living in deprived areas.

3.13 Other local issues, although not necessarily elements of *'need',* can be important material considerations.

Appropriate Scale of Development

3.14 PPS6 also requires that local planning authorities ensure that the scale of opportunities identified is directly related to the role and function of the centre and its catchment. Paragraph 2.41 states:

> *'The aim should be to locate the appropriate type and scale of development in the right type of centre, to ensure that is fits into that centre and that it complements its role and function.'*

3.15 For city and town centres, PPS6, paragraph 2.43 states that where a need has been identified, LPA's should seek to identify sites in the centre, or failing that on the edge of the centre, capable of accommodating larger format developments. Paragraph 2.42 indicates that in most cases it is likely to be inappropriate to include local centres within the search area to be applied under the sequential approach for large scale developments.

3.16 The guidance places greater emphasis on the regeneration of town centres, particularly smaller centres and the need to define a network of centres, and where appropriate to plan for the decline of some centres. Local authorities are expected to set indicative upper limits on the scale of new floorspace appropriate in different types of centres.

The Sequential Approach

3.17 PPS6 sets out the sequential approach to site selection for new retail development (paragraph 2.44), namely that first preference should be existing centres where suitable sites or buildings for conversion are, or are likely to become available, taking account of an appropriate scale of development in relation to the role and function of the centre, followed by edge-of-centre locations, with preference given to sites that are or will be well-connected to the centre and only then out-of-centre sites, with preference given to sites which are or will be well served by a choice of means of transport and which are close to the centre and have a high likelihood of forming links with the centre.

3.18 Further to this LPA's should, in consultation with stakeholders (including the development industry) and the community, identify an appropriate range of sites to allow for accommodation of the identified need. Paragraph 2.45 emphasises the need for flexibility and realism from both LPA's and developers and operators in discussing the identification of sites;

> *'LPA's should be sensitive to the needs of the community and stakeholders, including developers and operators and identify sites that are, or are likely to become available for development during the development plan period and which allow for the accommodation of the identified need, including sites capable of accommodating a range of business models.'*

3.19 The factors that should be taken into account in considering business models are scale, format, car park provision and the scope for disaggregation.

3.20 In selecting sites for allocation, the LPA should also consider the degree to which other considerations, including specific local circumstances, may be material to the choice of appropriate locations for development, and these include physical regeneration, employment, economic growth and social inclusion.

3.21 The guidance clearly states that local planning authorities should plan positively for growth by making provision for a range and choice of shopping and services. If a 'need' for new development is established, it will be necessary to identify opportunities to meet that need. PPS6 indicates that local authorities should allocate sufficient sites to meet anticipated demand for the next five years. PPS6 also suggests that an apparent lack of sites of the right size and in the right location should not be construed as an obstacle to site allocation and development to meet this need. Local planning authorities should consider the scope for effective site assembly using their compulsory purchase (CPO) powers, to ensure that suitable sites within or on the edge of centres are brought forward for development.

3.22 This suggests the onus is placed on the Council to identify sites to accommodate the 5-year demand for development. This study provides floorspace projections up to 2021. Therefore, it may not be appropriate for the Council to seek to identify opportunities to accommodate projections up to 2021 at this stage.

3.23 PPS6 also suggests that where growth cannot be accommodated in identified existing centres, local planning authorities should plan for the extension of the primary shopping area if there is a need for additional retail provision or, where appropriate, plan for the extension of the town centre to accommodate other main town centre uses. Extension of the primary shopping area or town centre may also be appropriate where a need for large developments has been identified and this cannot be accommodated within the centre. Larger stores may deliver benefits for consumers and local planning authorities should seek to make provision for them in this context. In such cases, local planning authorities should seek to identify, designate and assemble larger sites adjoining the primary shopping area (i.e. in edge-of-centre locations).

Planning for a Sustainable Future White Paper (May 2007)

3.24 The White Paper, Planning for a Sustainable Future was published in May 2007 and sets out a wide ranging package of reforms to streamline the town and country planning system.

3.25 In relation to town centre planning policy the White Paper states in paragraph 7.50 that:

> *"A crucially important aspect of creating places where people want to live and communities can flourish is to maintain and nurture the vitality of our town centres."*

3.26 The White Paper emphasises the need for local authorities to proactively manage the role and function of their town centres, including by extending the boundary where that makes sense, and to promote growth and development of their town centres by facilitating a wide range of shopping, leisure and local services to enhance consumer choice. To achieve this, local authorities need to have robust, evidence based plans and strategies that are up to date and which set out a clear and pro-active vision for town centres based on a sound understanding of both the need and demand for new facilities.

3.27 The White Paper goes on to state in paragraph 7.52 that:

> *"Where development outside the town centre would not impact detrimentally on the town centre, and it is otherwise acceptable in planning terms, both plans and planning decisions should reflect this."*

3.28 In relation to the *'needs test'*, the paper considers that it can have the unintended effect of restricting competition and limiting consumer choice. To address this issue, two clear objectives have been identified, firstly to support current and prospective town centre investment which contributes to economic prosperity and to national social and environmental goals. Secondly, planning should promote competition and improve consumer choice avoiding the unintended effects of the current needs test.

3.29 It is therefore proposed to review and replace the current need and impact tests with a new test which has a strong focus on national town centre policy and promotes competition and improves consumer choice avoided the unintended effects of the current needs test. Proposals for this were consulted on in late summer/early autumn 2007.

3.30 The Planning White Paper Consultation: Government Response to Consultation Replies (November 2007) outlines that most of the general responses to the proposals objected to the removal of the need test on the basis that it would weaken town centre policy. The Government response, however, reasserted that there is a need for a robust approach to assessing the impact of proposals on sites outside town centres, which is responsive to the needs of the market and also reflects particular local circumstances.

Proposed Changes to PPS6 (10th July 2008)

3.31 On 10 July 2008, the Department of Communities and Local Government published a Consultation Document on proposed changes to PPS6 Planning for Town Centres. The Consultation Paper proposes replacing the current 'need' and 'impact' tests set out in PPS6 with a new 'impact test'.

3.32 The aim of the document is to address the unintended effects of the current guidance. The key Government objective to promote the vitality and viability of town centres remains, as does much of the Government's guidance on Positive planning and the Plan-led approach.

3.33 However, other objectives which should be taken into account, or wider Government objectives that may be relevant include:

- Promotion of competition between retailers;
- Raising the productivity growth rate of the UK economy;
- Encouraging investment in deprived areas;
- Building prosperous communities by improving economic performance;
- Helping to tackle climate change; and
- Consideration of terrorism as well as crime

3.34 The need for local authorities to consider quantitative and qualitative need remains. However, Councils are also expected to have regard to the strategic objectives set out in the Regional Economic Strategy and use relevant market information and economic data.

3.35 The importance of seeking a good mix of shops and services in a centre is also referred to, with the role of smaller shops specifically noted. Authorities are encouraged to seek to promote competitive town centre environments.

3.36 Suggested changes to Chapter 4 of PPS6 includes a list of key indicators that LPAs should collect and use to monitor the health of their town centres, including:

- The proportion of vacant street level property and the length of time properties have been vacant;
- Land values and the length of time key sites have remained undeveloped; and
- Perception of crime and occurrence of crime including safety and security issues relating to the threat of terrorism.

3.37 The Proposed Changes to PPS6 are the subject of consultation until 3 October 2008.

Planning Policy Guidance Note 13: Transport (PPG 13, March 2001)

3.38 The key objectives, set out at paragraph 4 of PPG13 are to integrate planning and transport, in order to:

- *"promote more sustainable transport choices for both people and for moving freight;*
- *promote accessibility to jobs, shopping, leisure facilities and services by public transport; and*
- *reduce the need to travel, especially by car."*

3.39 The Guidance advises that planning policies should seek to promote the vitality and viability of existing town centres, which should be the preferred locations for new retail and leisure developments. When this development cannot be accommodated in or on the edge of existing centres, it may be appropriate to combine the proposal with existing out-of-centre developments.

The London Plan

3.40 The London Plan: Spatial Development Strategy has replaced strategic planning guidance for London (formerly RPG3). The London Plan was published in February 2004 and a consolidated version with alterations was published in February 2008 (London Plan). One of the strategic priorities for North London (Policy 5B.1) is to: *"enhance the attractiveness of town centres to consumers and manage the restructuring of town centres in need of change, especially in the outer parts of the sub-region".*

3.41 Policy 3D.1 relates to town centres stating that the Mayor and London Boroughs should: "enhance access to goods and services and strengthen the wider role of town centres, including UDP policies to:

- *Encourage retail, leisure, and other related uses in town centres, and discourage them outside the town centres;*
- *Improve access to town centres by public transport, cycling and walking;*
- *Enhance the quality for retail and other consumer service in town centres*
- *Support a wide role for town centres as locations for leisure and cultural activities, as well as business and housing;*
- *Require the location of appropriate health, education and other public and community serving in town centres;*
- *Designate core areas primarily for shopping uses and secondary areas for shopping and other uses and set out policies for the appropriate management of both types of area;*
- *Undertake regular town centre health checks; and*
- *Support and encourage town centre management, partnerships and strategies including the introduction of Business Improvement District in appropriate locations."*

3.42 Policies 3D.2 and 3D.3 are consistent with advice set out in PPS6, regarding maintaining town centres and focusing development within centres. Policies 3D.4 and 3D.5 seek to promote and protect arts/culture and sports facilities.

3.43 The London Plan sets out a hierarchy/classification of centres across London, i.e. international centres (2), metropolitan centres (10), major centres (35) and district centres (160). 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. The London Plan indicates that the broad classification of centres should be refined in the light of local circumstances through development plans.

3.44 Supporting the London Plan the Mayor has also published two documents relating to the future requirement for retail floorspace:

- Comparison Goods Floorspace Need in London (October 2004); and
- Convenience Goods Floorspace Need in London (June 2005).

3.45 These reports provide broad brush projections for retail floorspace requirements across London up to 2016 based on a number of scenarios relating to growth in turnover sales densities.

Sub-Regional Planning Framework

3.46 The North London Sub-Regional Planning Framework (SRDF) was published in May 2006, covering the Boroughs of Barnet, Enfield, Haringey and Waltham Forest. The document states in relation to retail developments (Paragraph 57):

> *"In North London, population and consumer expenditure growth is generating a need for new retail space. Resident-based consumer expenditure in the sub-region is anticipated to increase by over 46% between 2001 and 2016. Comparison goods expenditure is expected to double from £2.4bn to £4.8bn and convenience goods expenditure is expected to increase, but at a more modest rate of about 34% from £1.55bn to £2.1bn."*

3.47 The framework indicates that there is capacity to accommodate some of North London's need for new retail floorspace in Wood Green. In paragraph 135 it states that *"Wood Green remains the largest town centre in the sub-region and its role as a Metropolitan Centre should be enhanced by exploiting development opportunities in the associated Haringey Heartlands Area for Intensification and through higher density mixed use schemes in the town centre".*

3.48 In relation to cultural and leisure uses action point 1D requests that Boroughs "consider the need to accommodate growth in cultural and leisure services (including strategic provision) and the needs of business and leisure visitors".

3.49 In Annex 1 of the SRDF Wood Green is identified as a Metropolitan Centre with a GOAD/CASA floorspace of 106,000 sq. m, with a modelled comparison goods floorspace need between 2001-2016 of 7,000 - 11,000 sq. m. The District Centres in the Borough have the following GOAD/CASA floorspace and modelled comparison goods floorspace (shown in brackets):

- Tottenham – 26,000 sq m (1,000 - 2,000 sq m)
- Muswell Hill – 29,000 sq m (1,000 – 2,000 sq m)
- Green Lanes – 36,000 sq m (<1,000 sq m)
- Finsbury Park (also part of Hackney/Islington) – 9,000 sq m
- Crouch End – 32,000 sq m (1,000 sq m)
- West Green Road – 2,000 sq m

Local Planning Context

3.50 The London Borough of Haringey Unitary Development Plan was adopted in July 2006. Policies are automatically saved until July 2009. 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

3.51 The adopted UDP sets out a number of general strategic policies for the Borough. The strategic policy in relation to Town Centres and Retailing (Policy G5) states:

> *"The Council will seek to maintain and enhance the existing hierarchy of shopping which comprises:*
>
> *a) Metropolitan Centre serving a wide area of North London.*
>
> *b) Five District Centres.*
>
> *c) Designated Local Shopping Centres.*
>
> *d) Other local parades and individual shops including retail parks."*

3.52 In terms of Town Centres and Retailing, Policy TCR1 relates to Development in Town and Local Shopping Centres and states that development within the identified town and local shopping centres will be supported provided that the proposal:

a) is appropriate to the scale, character and function of the centre;

b) does not harm the vitality and viability of the centre of other centres;

c) does not cause an unacceptable increase in disturbance from noise, smell, fumes or other environmental harm;

d) does not have an adverse impact on transport; and

e) complies with policies TCR3 and TCR4.

3.53 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 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.

3.54 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."*

3.55 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.

3.56 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

3.57 The London Borough of Haringey has begun preparing a Local Development Framework (LDF) in line with the new provision of the Planning and Compulsory Purchase Act 2004. A Local Development Scheme (LDS) was approved by the Secretary of State in May 2007. The Council's Statement of Community Involvement (SCI) was adopted in March 2008. It is anticipated that the Core Strategy will be adopted in December 2009. The London Borough of Haringey LDF will comprise the following:

- Core Strategy;
- Joint Waste DPD;
- Central Leeside Area Action Plan;
- Conservation Supplementary Planning Document;
- Tottenham Hale Urban Centre Masterplan – *Adopted October 2006*
- Lawrence Road Supplementary Planning Document – *Adopted October 2007*;
- Open Space Standards Supplementary Planning Document – *Adopted June 2008;*
- Housing Supplementary Planning Document – *Adopted October 2008*;
- Wood Green Town Centre Spatial Plan Supplementary Planning Document – *Adopted October 2008;*

3.58 The LDF Core Strategy Issues and Options document was published for public consultation in February 2008. The documents highlights that Wood Green needs new investment if it is to withstand competition from neighbouring centres and that the other town centres are also in need of investment in shops if they are to remain attractive to local people. The document considers whether the Council should do more to recognise the characters of its centres and redefine the boundaries if necessary. It also questions whether the Council should seek to resist new shopping developments that are not compatible with the character and function of shopping centres (for example in terms of shop unit sizes and design and protect areas of specialist shopping) and whether stricter controls should be applied to restaurants, cafes, bars and clubs and management of the night time economy. It also considers the Boroughs local shopping centres and what role they play in the future and if the Council should increase or decrease the number and size of local shopping centres.

Wood Green Town Centre Supplementary Planning Document

3.59 The Wood Green Town Centre Supplementary Planning Document was published on 2nd June 2008 and is on consultation until 25th June 2008. The SPD has been prepared to establish a vision for the future of Wood Green town centre. To achieve the vision a series of objectives have been developed including: to develop the range and quality of the retail offer within the town centre and to encourage the development of appropriate leisure and night-time economy uses in the town centre.

3.60 In terms of retail, the SPD proposes improvements to the street environment and shop frontages on Wood Green High Road and Turnpike Lane and creating larger retail units through the sensitive merging of existing units in the short to mid term and group refurbishment schemes in the short term.

4.0 THE SHOPPING HIERARCHY AND CATCHMENT AREA

Shopping Centres in Haringey and the Surrounding Area

4.1 Wood Green, Muswell Hill, Crouch End, Tottenham High Road/Bruce Grove, Green Lanes and West Green Road/Seven Sisters Road are the six main shopping centres within the London Borough of Haringey. These 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.

4.2 Venuescore's UK Shopping Index 2006 provides an index of retail centres on the basis of a weighted score for multiple retailers represented in each centre. Venuescore's rank for centres in the Borough and other shopping centres in the sub-region are shown in Table 4.1.

4.3 Wood Green is the highest ranked centre in the Borough (133rd) followed by Muswell Hill (639th), Tottenham (756th) and Crouch End (1,060th). There are several centres surrounding the Borough that are ranked above Wood Green including Oxford Street, Romford and Ilford. Brent Cross and Walthamstow are ranked slightly below Wood Green. Muswell Hill is ranked below centres such as Chingford, Barnet and Dalston but above Upper Edmonton, Lower Edmonton, Leyton and Palmers Green. Tottenham is ranked slightly below Palmers Green but above Southgate and Whetstone. Crouch End is ranked just above Tottenham Hale Retail Park and just below Southgate and Whetstone. Major expansion proposals at Brent Cross and Stratford will alter the Venuescore rankings in the future and may mean that Wood Green slips in the rankings.

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

Table 4.1 Venuescore Shopping Index (2006)

Venue	Venuescore Index	Rank
Oxford Street	297	11
Romford	188	54
Ilford	160	87
Wood Green	**134**	**133**
Brent Cross	127	146
Walthamstow	122	161
Islington	92	232
Enfield	90	241
Stratford	77	291
Finchley	76	297
Holloway	67	336
Chingford	64	363
Barnet	57	415
Dalston	46	513
Hackney	40	588
Muswell Hill	**39**	**613**
Upper Edmonton	38	627
Leyton	37	644
Lower Edmonton	32	737
Palmers Green	30	782
Tottenham	**31**	**756**
Southgate	23	1,034
Whetstone	23	1,034
Crouch End	**22**	**1,060**
Tottenham Hale Retail Park	**20**	**1,173**
Stoke Newington	20	1,173
Friern Bridge Retail Park	17	1,357
Haringey	**14**	**1,619**
Winchmore Hill	14	1,619
Finsbury Park	10	2,071
London, South Tottenham	10	2,071

4.5 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.

4.6 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.

4.7 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.

4.8 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 7.5% to 5.75% since 2004. Yields within Wood Green are slightly higher (worse) than the West End, Romford and Ilford (The Exchange) but slightly lower (better) than in Enfield, Finchley, Barnet and Ilford. For Muswell Hill, retail yields are the same as for Ilford and are slightly higher (worse) than Finchley but are slightly lower (better) thank for Palmers Green and Chingford.

Table 4.2: Retail Yields in Haringey and Other Centres

Centre	Yield (%)								
	2000	2001	2002	2003	2004	2005	2006	2007	2008
London West End	5	5.25	5.25	5.25	5.25	5.25	5	4.5	4.25
Romford	6.5	7	7	6	5.5	5.5	5.5	5.5	5.5
Ilford (The Exchange)	7	7	7	7	5	5.5	5.5	5.5	5.5
Wood Green	**8**	**8**	**7.5**	**7**	**7.5**	**7**	**6.75**	**6.25**	**5.75**
Enfield	8	7.5	7.5	7.5	7.5	7	6.75	6.25	5.75
Finchley	8	8	8	7.5	8	7.5	7	6.5	6
Barnet	9	9	8.5	8.5	8.5	7	7.5	6.5	6
Ilford	7	7	7	7	7	7	7	6.5	6.5
Muswell Hill	**8**	**8**	**8**	**8**	**8**	**8**	**7.5**	**7**	**6.5**
Palmers Green	10	10	>=10	>=10	>=10	>=10	9	7.75	7.5
Chingford	10	9.5	9.5	9.5	9.5	9.5	7.5	7.5	7.5
Walthamstow	10	9	9	9	9	9	9	7.5	7.5

Source: Valuation Office (Jan 08)

4.9 Retail rental data is also only available for Wood Green and Muswell Hill. Wood Green achieves a Zone A rent of £1,399 per sq m and retail rents have steadily increased in the centre since 1998. 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 Palmers Green. For Muswell Hill, retail rental data is only available for 2007 (£969 per sq m), retail rents are higher than in Barnet and Palmers Green but lower than Wood Green and Walthamstow.

Table 4.3: Retail Rents in Haringey and Other Centres

Centre	Annual Zone A Retail Rents £ per Sq M								
	1998	1999	2000	2001	2002	2003	2004	2005	2007
London, Oxford St	3,498	4,979	4,575	4,441	4,467	4,575	4,629	4,629	4,736
Brent Cross	3,229	4,090	4,521	4,306	4,306	4,467	4,467	4,467	4,467
Romford	1,292	1,292	1,884	1,884	1,722	1,830	1,938	2,045	2,153
Ilford	968	1,292	1,399	1,399	1,399	1,453	1,614	1,722	1,722
Enfield	1,023	1,023	1,130	1,130	1,130	1,292	1,292	1,507	1,561
Wood Green	**807**	**915**	**969**	**1,076**	**1,076**	**1,238**	**1,292**	**1,292**	**1,399**
Walthamstow	538	538	592	592	592	592	968	1,022	1,023
Muswell Hill	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**969**
Barnet	538	538	538	592	592	646	646	646	646
Palmers Green	323	323	377	377	377	430	430	430	484
Finchley	430	430	430	484	484	538	592	592	~
Waltham Cross	-	-	-	-	-	-	538	592	~

Source: Colliers CRE In-Town Retail Rents.

4.10 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 rents have been increasing steadily over time.

Socio-Economic Characteristics within Haringey

4.11 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 of the London Borough of Haringey have been examined and compared with the Inner London and national averages.

4.12 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 4.4: 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

Sources: 2001 Census of Population

4.13 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 4.5: 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

Sources: 2001 Census of Population

4.14 The age structure in the Borough varies slightly when compared with the Inner London and National averages. The Borough has a much higher proportion of adults aged 15 to 29 but a lower proportion of adults aged 45 to 59 when compared to the Inner London and National averages. The proportion of adults aged 30 to 44 is slightly lower than the National average but significantly lower than the Inner London average.

Table 4.6: Age Structure 2001

Age	% of Population 2001		
	Haringey	Inner London Average	UK Average
Children 0-14	19.4	18.5	18.9
Adults 15 to 29	25.2	14.3	18.8
Adults 30 to 44	27.6	39.5	22.6
Adults 45 to 59	14.4	17.5	19.0
Adults 60 to 74	9.1	5.6	13.0
Adults 75 +	4.3	4.7	7.4

Sources: 2001 Census of Population

4.15 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 4.7: Ethnic Groups 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

Sources: 2001 Census of Population

4.16 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.

5.0 HOUSEHOLD SURVEY

Survey Structure

5.1 Research & Marketing carried out a telephone survey of 1,002 households across the London Borough of Haringey study area in June 2008. The key findings of the household survey can be found in Appendix E and a copy of the survey results are shown in Appendix F. The study area, shown in Appendix A, was split into ten sectors or zones based on postcode 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
- Zone 9: Walthamstow
- Zone 10: Edmonton/Winchmore Hill

5.2 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 A. The zones were chosen based on postcode boundaries which best fit the likely primary catchment areas of the main centres in the Borough.

5.3 The number of interviews undertaken in each zone reflects the population in each respective 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 grocery shopping;
- Top-up food and 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/garden items and hardware;
  - health, beauty and chemist goods;
  - other non-food items; and

- Leisure activities, including:
  - cinema;
  - theatre;
  - pub/bar;
  - restaurant;
  - nightclub;
  - bingo;
  - health club; and
  - ten-pin bowling.

Key Messages from the Household Survey Results

5.4 Key findings of the household survey are summarised below:

- Large food stores are the primary destinations for main food shopping, but the preferred location of these food stores varies significantly throughout the study area. Generally residents will visit store near to their home, and a relatively high proportion of people walk to buy food and grocery items.
- Over 80% of respondents indicated that they undertook small scale shopping or top-up shopping trips in addition to their main food shopping trips.
- A relatively low proportion of respondents travel by car for both food and non-food shopping, when compared with NLP's national average derived from other surveys. A far higher proportion of respondents use the bus or walk when compared to NLP's national average.
- Many respondents use their nearest town centre for comparison shopping, however, for electrical goods, and books/cd's/toys and gifts the internet was a popular location. For DIY, hardware and garden items the majority of respondents used large DIY stores including B&Q at Tottenham Hale Retail Park and Homebase at New Southgate and Arena Park.
- Nearly half of the respondents regularly use the internet to shop with the most common goods purchased being books, CDs, toys and gift items and electrical, TV, hi-fi and computer items. About 5.1% of respondents regularly use the internet to shop for their groceries.
- The household survey demonstrates that for the majority of leisure activities respondents most popular destination is within the Borough i.e. pubs/bars, restaurants, cinema, bingo and health and fitness clubs. Popular destinations outside the Borough include Central London, Enfield and East Finchley. Central London was a popular destination for theatre-goers.

6.0 CENTRE VISITOR SURVEYS

Survey Structure

6.1 An on-street survey of visitors within the six main shopping centres in Haringey was undertaken by Research and Marketing. In total 701 interviews were completed. The key findings of the surveys are summarised in this Appendix G and a copy of the detailed survey results are provided in Appendix H. Interviews were conducted in June 2008, on all weekdays and Saturdays and throughout the day.

Table 6.1: Survey Structure

Centre	Number of interviews
Wood Green	182
Muswell Hill	119
Crouch End	114
Bruce Grove/Tottenham High Road	94
Green Lanes	93
West Green Road/Seven Sisters	99
Total	**701**

Key Messages from the On-Street Survey Results

- All centres attract visitors for a range of activities. In all centres shopping for food and grocery and other convenience goods was important.
- Crouch End and Muswell Hill appear to attract more affluent customers than the other four centres. However, all centres attract a mix of socio-economic groups.
- The highest average spend on food and groceries ranged from £7.21 to £14.22, and the highest was achieved in Green Lanes. In terms of non-food goods, the highest average spend was achieved in Wood Green (£17.90). The next highest was Crouch End (£10.21). These two centres attracted the highest proportion of clothing/footwear shoppers. The average spend on eating and drinking was relatively low in all centres.
- 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 six centres visited the centre frequently at least once a week. Crouch End and Muswell Hill had the highest frequency of visit (over 3 per week). West Green Road/Seven Sisters was the lowest with 2.29 visits per week.
- The average length of stay was relatively short in all centres (between 23 to 33 minutes).

- A significant proportion of visitors to each centre indicated that they also visited other centres in Haringey. Central London is also a popular shopping destination outside of the Borough. Brent Cross attracts customers from the west side of the Borough.

- Car parking availability and charges appear to be concerns within all centres, along with traffic congestion.

- Concerns relating to environmental quality and safety issues appear to be more significant in Wood Green, Bruce Grove/Tottenham High Road and West Green Road/Seven Sisters.

7.0 WOOD GREEN METROPOLITAN CENTRE

Introduction

7.1 Wood Green is located centrally within the Borough with its shopping spine on the main north-south thoroughfare of Green Lanes, though the A105 is known as the High Road along this stretch. Wood Green is defined as a Metropolitan Shopping Centre in both The London Plan and the Haringey UDP and serves shoppers from the Borough and across North London. The centre fulfils a strategic shopping role, providing both convenience and high order and low order comparisons retailers. The centre also has a significant leisure and entertainment offer serving the Borough and beyond.

7.2 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 the major multiple retailers located in the centre. The main supermarkets within Wood Green are evenly spread throughout the centre, with the large Morrison's and Sainsbury's supermarket both located centrally. In addition there is a Marks & Spencer's Food Hall located in the southern part of the centre and an Iceland supermarket located on Brook Road. Wood Green Metropolitan Centre is bounded predominantly by residential areas, though there are some small areas of green space and light industrial and commercial type uses adjacent to the town centre boundary.

Mix of Uses and Occupier Representation

7.3 Wood Green Metropolitan Centre's key roles include:

- *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 and a Marks & Spencer's Food Hall;
- *comparison shopping* - a good proportion of national multiple retailing shops alongside a good selection of independent retailers selling a range of low and high order goods.
- *services* – including a good range of cafés, restaurants and takeaways, a reasonable range of high street national banks/building societies, a good range of hairdressers and beauty parlours and several 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.

7.4 Wood Green Metropolitan Centre has 365 retail/service units (excluding non-retail Class A uses). Table 7.1 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. The proportion of comparison retail units is above the national average, as is the proportion of A2 service units. The proportion of convenience units, A1 services and A3/A5 units are all slightly lower than the national average. The proportion of vacant units is significantly below the national average.

Table 7.1: 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	185	52.0	45.4
Convenience Retail	30	8.4	9.1
A1 Services	31	8.7	10.6
A2 Services	45	12.6	9.6
A3 and A5	47	13.2	14.3
A4	9	N/A	N/A
Vacant	18	5.1	11.0
Total	**365**	**100.0**	**100.0**

Source: Goad (Nov 2007)
** UK average relates to all town centres surveyed by Goad Plans (Nov 2007)*

Retailer Representation

7.5 Wood Green Metropolitan Centre has a very good selection of comparison shops (185) 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. Table 7.2 provides a breakdown of comparison shop uses by goods categories.

Table 7.2: Wood Green Metropolitan Centre Breakdown of Comparison Units

Type of Unit	Wood Green		UK Average*
	Wood Green	%	%
Clothing and Footwear	87	47.0	27.4
Furniture, carpets and textiles	9	4.9	8.8
Booksellers, arts, crafts and stationers	7	3.8	9.3
Electrical, gas, music and photography	20	10.8	10.1
DIY, hardware & homewares	5	2.7	6.3
China, glass, gifts & fancy goods	5	2.7	3.7
Cars, motorcycles & motor access.	1	0.5	2.9
Chemists, drug stores & opticians	14	7.6	8.7
Variety, department & catalogue	4	2.2	2.0
Florists, nurserymen & seedsmen	1	0.5	2.2
Toys, hobby, cycle & sport	10	5.4	5.3
Jewellers	10	5.4	5.1
Other comparison retailers	12	6.5	8.2
Total	**185**	**100.0**	**100.0**

Source: Goad (Nov 2007)
** UK average relates to all town centres surveyed by Goad Plans (Nov 2007)*

7.6 All categories of comparison goods identified are represented within the centre with a broadly similar profile of uses to the national average, apart from some notable exceptions. The proportion of 'clothing and footwear' retail units is significantly higher than the national average with the proportions of 'booksellers, arts, crafts and stationers', 'furniture, carpets and textiles' and 'DIY, hardware and homewares' units all notably lower. All of the other types of comparison retail units have similar proportions to the national average. There is a very good representation of major national multiple comparison retailers selling a range of high and low order goods. These include:

- Boots the Chemist;
- Superdrug;
- The Body Shop;
- Woolworths;
- Wilkinson;
- Argos Extra;
- WH Smith;
- HMV;
- Game;
- Gamestation;
- Clintons;
- Maplin Electronics;
- Currys;
- Ernest Jones;
- H Samuel
- Mothercare;
- BHS;
- H&M;
- Next;
- New Look;
- JD Sports;
- Burton;
- Top Shop;
- Evans;
- Top Man;
- Wallis;
- Dorothy Perkins;
- TK Maxx;
- Peacocks;
- Matalan;
- Marks & Spencer;
- Clarks; and
- River Island

Service Uses

7.7 Wood Green Metropolitan Centre has an excellent range of service uses, with a choice of service providers across all of the categories, as shown in Table 7.3. The centre has a relatively high proportion of 'restaurants, cafes and takeaways' and a slightly lower proportion of 'hairdressers and beauty parlours' compared with the national averages. The proportions of 'banks and other financial services', 'estate agents and valuers', 'travel agents' and 'laundries and dry cleaners' are all similar to the national average.

Table 7.3: Wood Green Metropolitan Centre Analysis of Selected Service Uses

Type of Use	Wood Green Metropolitan Centre		UK Average*
	Units	%	%
Restaurants, cafes & takeaways	47	50.6	43.1
Banks/other financial services	13	14.0	15.4
Estate agents and valuers	11	11.8	11.7
Travel agents	3	3.2	4.9
Hairdressers & beauty parlours	16	17.2	22.0
Laundries and dry cleaners	3	3.2	2.9
Total	**93**	**100.0**	**100.0**

Source: Goad (Nov 2007)
**UK average relates to all town centres surveyed by Goad Plans (Nov 2007)*
N.B. 'Restaurants, cafés and takeaways' does not include the 9 pubs in the centre

7.8 Several high street banks/building societies are represented within Wood Green, including HSBC, Natwest, Barclays, Lloyds TSB, Abbey, Halifax, Nationwide, Alliance & Leicester, The Co-operative Bank and Cheltenham & Gloucester. 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.

7.9 There are several vacant units on along Wood Green High Road though there are no obvious clusters of vacant units within the centre and the vacancy rate is reasonably low compared with the national average. The national multiple comparison and service retailers are predominantly found in the core areas of Wood Green Metropolitan Centre, in The Mall Wood Green and along the central area of the High Road. The independent comparison and service retailers are predominantly located in the peripheries of the centre.

Centre Audit

7.10 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 areas 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

7.11 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 Wood Green's score:

Performance Factor	Primary Area Score	Secondary Area Score
Proportion of specialist independent traders	3	4
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 (June 2008)

7.12 The quality and proportion of special independent traders within the primary area is reasonable although these are 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 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

7.13 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	2	2
CCTV coverage/police presence	4	4
Frequency of street lighting	4	4

Source: NLP Site Visit (June 2008)

7.14 During NLP's visit to the centre there were significant levels of on-street drinking in areas, both informally outside of Public Houses and more generally on the street, although this did not appear bad natured. The CCTV coverage and police presence was rated as good throughout and the frequency of street lights was also rated as good throughout. Overall it was considered that Wood Green offered a relatively strong feeling of safety during the day.

Accessibility & Movement

7.15 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	4	4
Pedestrian/vehicular conflict	2	2
Traffic congestion	3	1
Frequency of pedestrian crossings	4	4
Frequency of bus stops	4	4
Quality of bus stops/shelters	3	3

Source: NLP Site Visit (June 2008)

7.16 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.

7.17 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 Wood Green and the Morrison's multi-storey car park, which are all conveniently located. It is considered that the quality of bus stops/shelters could be improved within Wood Green as whilst the shelters appeared of a good design, they were poorly maintained.

Cleaning & Maintenance

7.18 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 reasonably poor overall with significant levels of litter and detritus, a significant amount of chewing gum on the paving and evidence of graffiti and fly-posting. However, 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 less levels of litter and slightly less well maintained shopfronts in many of the independent shops and services.

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

Source: NLP Site Visit (June 2008)

Quality of Streetscape & Environment

7.19 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, with most factors rated as 'neither good nor bad' or 'good'. 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	3	3
Quantity of street signage/maps	3	3
Quality of design of street lighting	4	4
Quality/attractiveness of commercial properties (inc. upper floors)	3	2
Quality of planting/trees	3	3
Quantity of planting/trees	4	4
Quantity/Quality of town centre parks/public open space	2	4
Street entertainment/events/ liveliness	3	3

Source: NLP Site Visit (June 2008)

7.20 The quantity and quality of the street signage was considered 'neither good nor poor' throughout. 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 Wood Green, 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. In the primary area there was little open space, although this was better within the secondary areas with public space at Hollywood Green and Ducketts Common adjacent to the centre in the south.

Property Vacancies

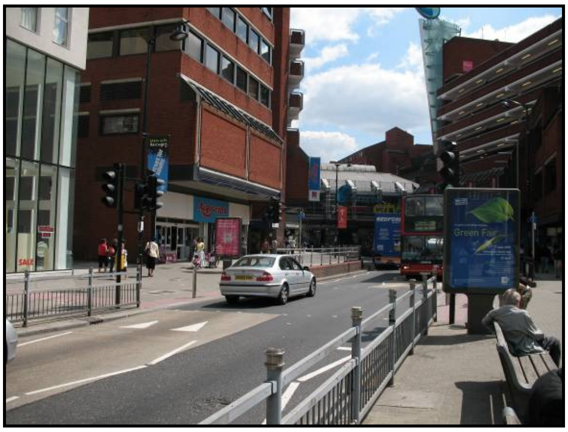
7.21 The number and concentration of shop vacancies were considered. When compared to the national average the vacancy levels within Wood Green can be considered good. There are slightly more vacancies in the secondary areas of Wood Green though generally there were no obvious clusters and limited evidence 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

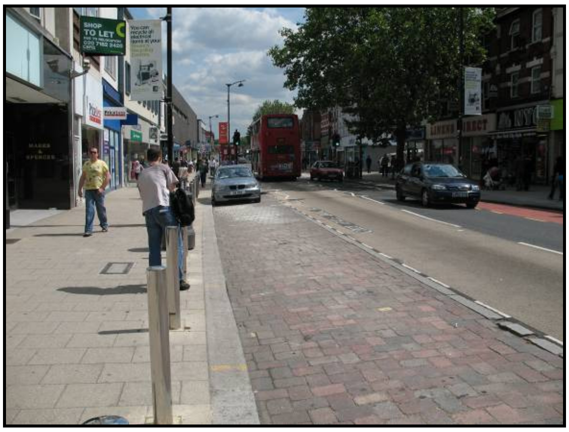
Source: NLP Site Visit (June 2008)

Summary

7.22 Overall the primary shopping area within Wood Green is considered reasonable with the average score for the 35 factors totalling 3.29 (i.e. between 'neutral' and 'good'). The primary area generally scored well on the quality of its streetscape and environment and on its trade mix. The primary area generally scored poorly on its cleanliness and maintenance.

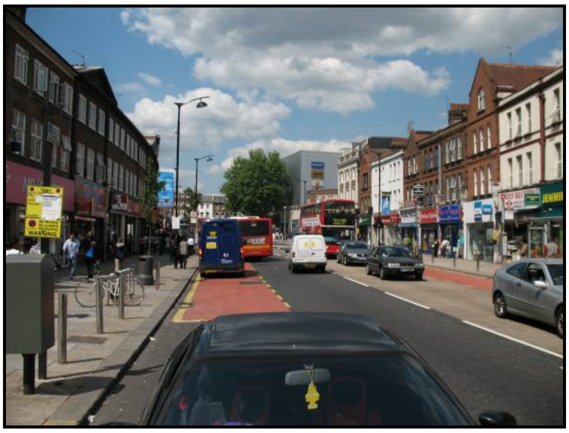


The Mall Wood Green – Primary Area



High Road facing south – Primary Area

Westbury Avenue and Turnpike Lane Tube Station – Secondary Area (south)



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

7.23 The secondary area scored slightly worse than the primary area with the average for the 35 factors totalling 3.20, which remains a reasonable score better than ‘neither good nor poor’. 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.

8.0 MUSWELL HILL DISTRICT CENTRE

Introduction

8.1 Muswell Hill was originally a medieval settlement developed near a spring, of reputed restorative properties, on Muswell Road. Today Muswell Hill is characterised by the essentially Edwardian suburban development with distinctive red brick Edwardian parades of shops. The roads in the centre were set out and developed predominantly in the late 1890's and early 1900's. 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 both the adopted Haringey UDP and the London Plan.

8.2 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 reasonably close to the central junction of Muswell Hill Broadway, Queens Avenue and Muswell Hill, which is an open roundabout with impressive curved retail frontages to it. The main supermarkets within the District Centre are located centrally, with the large Sainsbury's and the Marks & Spencer's Simply Food both close to the junction of Muswell Hill Broadway and Fortis Green Road. 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

8.3 Muswell Hill District Centre's key roles include:

- *convenience shopping* - including newsagents, grocers, bakers, an off licence and several health food shops. There are two supermarkets: a Sainsbury's and a Marks & Spencer Simply Food;
- *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.

8.4 Muswell Hill has 199 retail/service units (excluding non-retail Class A uses). Table 8.1 sets out the mix of uses in Muswell Hill District Centre, compared with the Goad national average.

Table 8.1: 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	78	40.4	45.4
Convenience Retail	25	13.0	9.1
A1 Services	29	15.0	10.6
A2 Services	24	12.4	9.6
A3 and A5	28	14.5	14.3
A4	6	N/A	N/A
Vacant	9	4.7	11.0
Total	**199**	**100.0**	**100.0**

Source: Goad Plans (Sept 2007)
** UK average relates to all town centres surveyed by Goad Plans (Nov 2007)*

8.5 The centre has a similar mix of uses compared with the national average, albeit with small variations. The proportion of comparison retail units is below the national average. The proportion of A1 service units, A2 units and convenience retail units in Muswell Hill are all above the national averages. There are a similar proportion of A3 and A5 units to the national average. The number of vacant retail/service units is lower than the national average, suggesting there is a reasonable demand for properties.

Retailer Representation

8.6 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 rest of the Borough. Table 8.2 provides a breakdown of comparison shop uses by goods categories. All categories of retail goods, except ‘cars, motorcycles and motor accessories’ are provided for in the centre, ensuring that the centre has a good range of comparison goods retailers. Broadly the profile of comparison units is similar to the national average.

Table 8.2: Muswell Hill Breakdown of Comparison Units

Type of Unit	Muswell Hill		UK Average*
	Units	%	%
Clothing and Footwear	23	29.5	27.4
Furniture, carpets and textiles	9	11.5	8.8
Booksellers, arts, crafts and stationers	7	9.0	9.3
Electrical, gas, music and photography	4	5.1	10.1
DIY, hardware & homewares	7	9.0	6.3
China, glass, gifts & fancy goods	3	3.8	3.7
Cars, motorcycles & motor access.	0	0.0	2.9
Chemists, drug stores & opticians	9	11.5	8.7
Variety, department & catalogue	1	1.3	2.0
Florists, nurserymen & seedsmen	2	2.6	2.2
Toys, hobby, cycle & sport	1	1.3	5.3
Jewellers	5	6.4	5.1
Other comparison retailers	7	9.0	8.2
Total	**78**	**100.0**	**100.0**

Source: Goad Plans (Sept 2007)

8.7 * UK average relates to all town centres surveyed by Goad Plans (Nov 2007)

8.8 There are good proportions of ‘clothing and footwear’ and ‘chemists, drug stores and opticians’ retailers when compared with the national averages. Muswell Hill also has a relatively good proportion of ‘DIY, hardware and homeware’ and ‘furniture, carpets and textiles’ retailers, reflecting the centres good provision of specialist shops for goods for the home. There are smaller proportions of ‘electrical, gas, music and photography’ and ‘toys, hobby, cycle and sport’ retailers than the national average. Other types of retail goods units have similar proportions to the national average. Major national comparison retailers present in the centre include :

- Blockbuster Video
- Woolworths
- Boots The Chemist
- Space.NK
- WH Smith
- Carphone Warehouse
- Phones 4 U
- Vodafone
- Dolland & Aitcheson
- Moss Bros
- Clarks
- Clinton Cards
- Möben Sharps Dolphin
- Futon Company
- Ryman
- Cancer Research UK
- Sue Ryder Care
- Oxfam

Service Uses

8.9 Muswell Hill has a good range of service uses, with all categories represented, as shown in Table 8.3. The centre has a good proportion of ‘estate agents and valuers’, and ‘launderettes and dry cleaners’ in comparison with the national average. There are a slightly lower proportion of ‘banks/other financial services’, ‘restaurant, cafes and takeaways’ and ‘hairdressers and beauty parlours’ than the national average. Broadly the profile of the selected service uses is similar to the national average.

Table 8.3: Muswell Hill Analysis of Selected Service Uses

Type of Use	Muswell Hill		UK Average*
	Units	%	%
Restaurants, cafes & takeaways	28	41.8	43.1
Banks/other financial services	9	13.4	15.4
Estate agents and valuers	10	14.9	11.7
Travel agents	2	3.0	4.9
Hairdressers & beauty parlours	13	19.4	22.0
Launderettes and dry cleaners	5	7.5	2.9
Total	**67**	**100.0**	**100.0**

Source: Goad Plans (Sept 2007)

8.10 * UK average relates to all town centres surveyed by Goad Plans (Nov 2007)

N.B. 'Restaurants, cafés and takeaways' does not include the 6 pubs in the centre

8.11 There are several high street national banks and building societies within the centre, including Abbey, 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 Ask, Giraffe, Pizza Express and Prezzo, 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

8.12 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

8.13 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).

8.14 The following table represents Muswell Hill's score:

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

Source: NLP Site Visit (June 2008)

8.15 The quality and proportion of specialist independent traders within both the primary and secondary areas is good, with traders providing 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 is 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 also good, with established high street retailers such as Woolworths, WH Smith and Boots present. In the secondary area there were fewer national multiple outlets. The presence of evening economy was rated as 'good' in the primary area with a good range of restaurants and bars. The secondary area also has several bars and restaurants, with the added attraction of the Odeon Cinema.

Anti-Social Behaviour & Security

8.16 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	4	4
CCTV coverage/police presence	4	3
Frequency of street lighting	4	4

Source: NLP Site Visit (June 2008)

8.17 During NLP's visit to the centre there was little evidence of on-street drinking or begging. 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 little evidence of anti-social behaviour.

Accessibility & Movement

8.18 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	4
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 (June 2008)

8.19 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 pedestrian permeability of the centre is 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 the car parks 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.

Cleaning & Maintenance

8.20 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	3	3
Chewing gum on paving	3	3
Evidence of fly-posting	4	4
Evidence of graffiti	4	2
Maintenance of paving/street materials	2	2
Quality of shop frontages/fascia	4	4

Source: NLP Site Visit (June 2008)

8.21 The cleanliness and maintenance of the primary area of Muswell Hill appeared mixed. The levels of litter and detritus were not significant but there were several rubbish bags on the pavements. 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 maintenance of paving/street materials was considered 'poor' throughout with many cracked areas and in places piecemeal tarmac where the pavement had been dug-up previously. 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

8.22 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 bins or benches located in the centre, 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)	3	3
Quantity of street furniture (bins and chairs)	2	2
Quantity/quality of Public Art	2	2
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	4	4
Quantity of planting/trees	3	3
Quantity/Quality of town centre parks/public open space	1	1
Street entertainment/events/ liveliness	3	3

Source: NLP Site Visit (June 2008)

8.23 The attractiveness of the commercial properties in both the primary area and the secondary areas is very good. The purpose-built Edwardian shopping parades particularly suit themselves to 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 positively contribute 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. The general liveliness of the centre was deemed 'neither good nor poor' with moderate amounts of people in the primary area, though not much on-street activity.

Property Vacancies

8.24 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 there were very few vacancies, with no obvious clusters and no apparent derelict units.

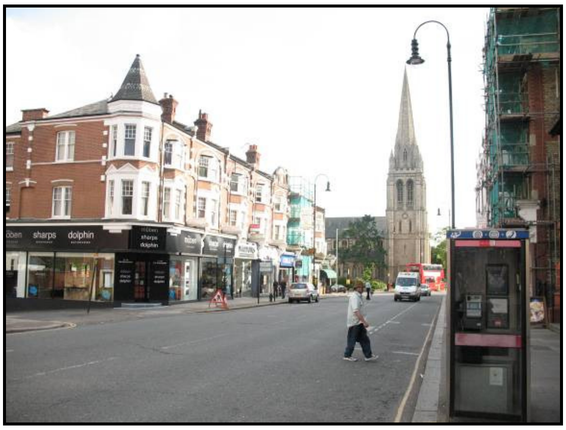
Performance Factor	Primary Area Score	Secondary Area Score
Number of vacant units	4	4
Concentrations of vacant units	5	5
Derelict/long term vacant units	5	5

Source: NLP Site Visit (June 2008)

Summary

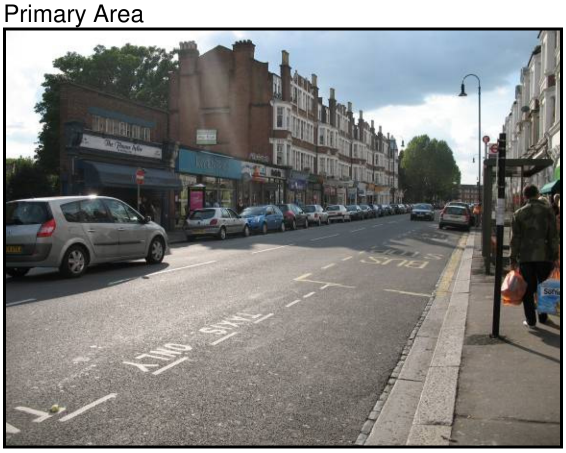
8.25 Overall the primary shopping area within Muswell Hill is good with the average score for the 35 factors totalling 3.41 (i.e. between 'good' and 'neither good nor poor'). Several factors in the primary area were rated 'very good' including the design of street lighting and the quality and attractiveness of commercial properties. Overall the centre is well presented, although there is room for improvement in the paving and the provision of street furniture, public art and signage.

Muswell Hill Broadway facing north – Primary Area



Muswell Hill Broadway facing St. James' Church – Primary Area


Junction of Muswell Hill Broadway and Fortis Green Road – Primary/Secondary Area


Fortis Green Road facing north – Secondary Area

8.26 The secondary area also scored well with an average for the 35 factors totalling 3.31, which is slightly worse than the primary area. Generally the secondary area scored worse than the lower than the area on the number and quality of national multiple outlets, though overall there was little difference between the primary and secondary areas.

9.0 CROUCH END DISTRICT CENTRE

Introduction

9.1 Crouch End was a medieval settlement developed around the intersection of several earlier roads. Today Crouch End is characterised by the 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 both the adopted Haringey UDP and the London Plan.

9.2 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 the large Budgens and the Tesco Express both on The Broadway. The majority of Crouch End 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

9.3 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 and a Marks & Spencer Simply Food;
- *comparison shopping* - a number of comparison shops, comprising of 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.

9.4 Crouch End has 267 retail/service units (excluding non-retail Class A uses). Table 9.1 sets out the mix of uses in Crouch End shopping centre, compared with the Goad national average. The centre has a reasonably different mix of uses compared with the national average. The proportion of comparison retail units is substantially below the national average while the proportion of A1 service retailers is significantly above the national average. The proportion of A2 service units, A3/A5 units and convenience retail units in Crouch End are all slightly above the national averages. The number of vacant retail/service units is lower than the national average.

Table 9.1: 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	92	36.5	45.4
Convenience Retail	26	10.3	9.1
A1 Services	49	19.4	10.6
A2 Services	31	12.3	9.6
A3 and A5	40	15.9	14.3
A4	15	N/A	N/A
Vacant	14	5.6	11.0
Total	**267**	**100.0**	**100.0**

Source: Goad Plans (Aug 2007)
** UK average relates to all town centres surveyed by Goad Plans (Nov 2007)*

Retailer Representation

9.5 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, though these fulfil a predominantly local comparison shopping role. Table 9.2 provides a breakdown of comparison shop uses by goods categories.

Table 9.2: Crouch End Breakdown of Comparison Units

Type of Unit	Crouch End		UK Average*
	Units	%	%
Clothing and Footwear	27	29.4	27.4
Furniture, carpets and textiles	12	13.0	8.8
Booksellers, arts, crafts and stationers	5	5.4	9.3
Electrical, gas, music and photography	7	7.6	10.1
DIY, hardware & homewares	7	7.6	6.3
China, glass, gifts & fancy goods	8	8.7	3.7
Cars, motorcycles & motor access.	0	0.0	2.9
Chemists, drug stores & opticians	9	9.8	8.7
Variety, department & catalogue	1	1.1	2.0
Florists, nurserymen & seedsmen	3	3.3	2.2
Toys, hobby, cycle & sport	3	3.3	5.3
Jewellers	4	4.3	5.1
Other comparison retailers	6	6.5	8.2
Total	**92**	**100.0**	**100.0**

Source: Goad Plans (Aug 2007)

9.6 * UK average relates to all town centres surveyed by Goad Plans (Nov 2007)

9.7 All categories of retail goods, except 'cars, motorcycles and motor accessories' are provided for in the centre. There are healthy numbers of both 'clothing and footwear' and 'furniture, carpets and textiles' retailers. Crouch End also has a relatively good proportion of 'china, glass, gifts and fancy goods' retailers and 'chemists, drug stores and opticians'. There are smaller proportions of 'electrical, gas, music and photography' and 'booksellers, arts, crafts and stationers' retailers than the national average. However, broadly there is a similar profile of units to the national averages. Major national comparison retailers present in the centre include:

- Blockbuster Video
- Woolworths
- Carphone Warehouse
- Boots The Chemist
- Clinton Cards
- Cancer Research UK
- Marie Curie
- Oxfam

Service Uses

9.8 Crouch End has a good range of service uses, with all categories except travel agents represented, as shown in Table 9.3. 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 9.3: Crouch End Analysis of Selected Service Uses

Type of Use	Crouch End		UK Average*
	Units	%	%
Restaurants, cafes & takeaways	40	41.6	43.1
Banks/other financial services	8	8.3	15.4
Estate agents and valuers	16	16.7	11.7
Travel agents	0	0.0	4.9
Hairdressers & beauty parlours	26	27.1	22.0
Launderettes and dry cleaners	6	6.3	2.9
Total	**96**	**100.0**	**100.0**

Source: Goad Plans (Aug 2007)
** UK average relates to all town centres surveyed by Goad Plans (Nov 2007)*
N.B. 'Restaurants, cafés and takeaways' does not include the 15 pubs in the centre

9.9 There are several high street national banks and building societies within the centre, including Abbey, Barclays, Lloyds TSB, Natwest, Nationwide and Halifax and there is also a Post Office. There are also several 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

9.10 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 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

9.11 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	4
Quality of specialist independent traders	4	3
Proportion of national multiple outlets	4	2
Quality of national multiple outlets	4	3
Presence of evening economy	3	3

Source: NLP Site Visit (June 2008)

9.12 The quality and proportion of specialist independent traders within both the primary and secondary areas is quite good, with traders providing a range of goods and services. 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 also good, with established high street retailers such as Woolworths and Boots 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. 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.

Anti-Social Behaviour & Security

9.13 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	4	4
CCTV coverage/police presence	4	4
Frequency of street lighting	4	4

Source: NLP Site Visit (June 2008)

9.14 During NLP's visit to the centre there was little evidence of on-street drinking or begging. CCTV coverage was visible in both primary and secondary areas but there did not appear to be a police presence. 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

9.15 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 (June 2008)

9.16 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. The main car park serving the centre is the car park to the rear of Budgens, which is located centrally but has a relatively small capacity. 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.

Cleaning & Maintenance

9.17 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	3	4
Evidence of fly-posting	3	4
Evidence of graffiti	3	4
Maintenance of paving/street materials	3	3
Quality of shop frontages/fascia	3	3

Source: NLP Site Visit (June 2008)

9.18 The cleanliness and maintenance of the primary area of Crouch End was generally 'neither good nor poor', although there were not excessive levels of litter and detritus during NLP's visit. The secondary area appeared cleaner, with less chewing gum on the pavements, less graffiti and less fly-posting. 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.

Quality of Streetscape & Environment

9.19 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)	5	4
Quality of planting/trees	4	3
Quantity of planting/trees	5	2
Quantity/Quality of town centre parks/public open space	4	1
Street entertainment/events/ liveliness	3	2

Source: NLP Site Visit (June 2008)

9.20 The attractiveness of the commercial properties in the primary area along The Broadway is very good, with the Victorian buildings enhancing the character of the centre and the modern infill developments not significantly detracting from the environmental quality. The Clock Tower provides an architectural focus for the primary area and acts as an historical piece of public art. In the secondary area the attractiveness of the commercial properties is also good, although there is less in the way of public art and visual interest. Throughout, the streetscape is complemented by modern street lighting that is styled to reflect the Victorian nature of the centre.

9.21 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 around, which significantly adds to environmental quality of the centre. The secondary areas are not so well served by public open space and have 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

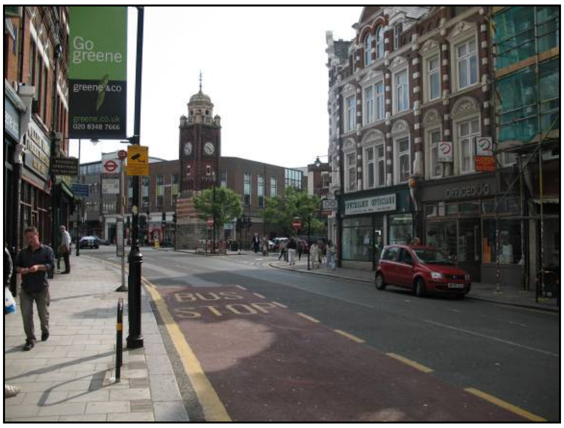
9.22 The number and concentration of shop vacancies were considered. When compared to the national average the vacancy level within Crouch End is very good. In the primary area there were very few vacancies, although in the secondary areas, especially in peripheral locations, there were more vacancies observed.

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

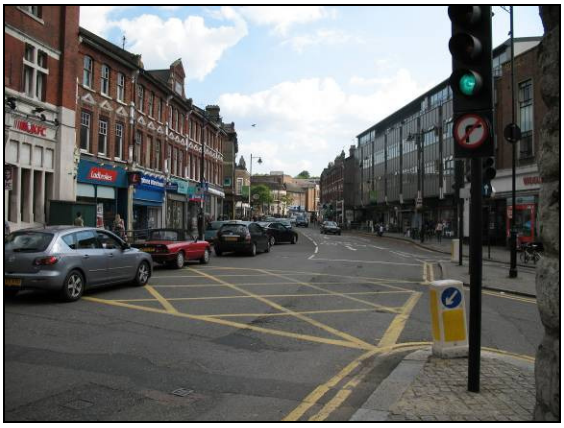
Source: NLP Site Visit (June 2008)

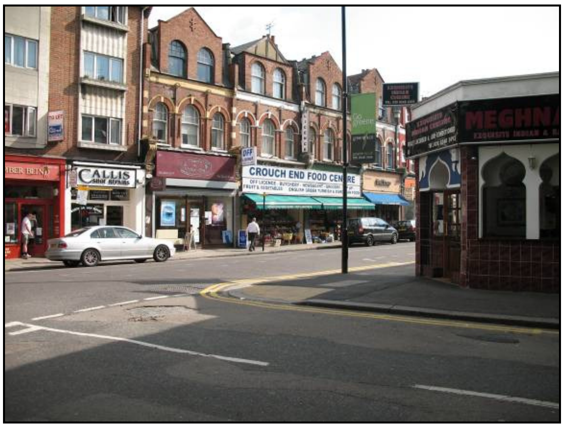
Summary

9.23 Overall the primary shopping area within Crouch End is considered reasonable with the average score for the 35 factors totalling 3.66 (i.e. closer to ‘good’ than ‘neither good nor poor’). Several factors in the primary area were rated ‘very good’ including the quantity of planting/trees, the design of street lighting and the quality and attractiveness of commercial properties. Overall the centre scored very well on its environmental quality. The traffic and vehicle/pedestrian conflict in the primary area was considered relatively poor.

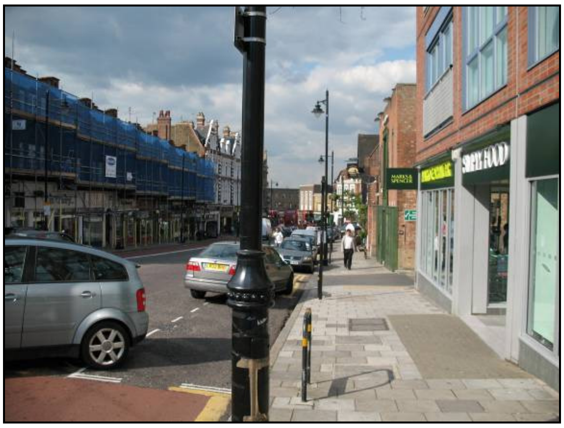


Crouch End Clock Tower – Primary Area


The Broadway – Primary Area



Broadway Parade North (Tottenham Lane) – Secondary Area


Crouch End Hill facing north – Secondary Area

9.24 The secondary area scored slightly worse than the primary area with the average for the 35 factors totalling 3.17, though this is still better than a ‘neither good nor poor’ rating. The secondary area had one factor rated ‘very good’, the quality of design of street lighting, and many factors rated as ‘good’. The secondary area generally scored poorly on the quantity of open space and the quantity of public art.

10.0 BRUCE GROVE/TOTTENHAM HIGH ROAD DISTRICT CENTRE

Introduction

10.1 Bruce Grove/Tottenham High Road is a District Centre centred around Bruce Grove railway station. Tottenham High Road has it's origins as far back as Roman times, although the current Bruce Grove section of Tottenham High Road has its development attributable to late Victorian times following the opening of Bruce Grove railway station in 1872. Subsequently Bruce Grove/Tottenham High Road District Centre is characterised by Victorian and Edwardian buildings with some modern infill. Today the centre serves an important local function to residents and shoppers in Tottenham. It is designated as District Centre in both the adopted Haringey UDP and the London Plan (as "Tottenham").

10.2 The centre is arranged in a Y shape with Bruce Grove Station at the centre. The retail frontages are located along the High Road, between the junctions with Kenmare Drive and St. Loy's Road, and along Bruce Grove. The main supermarkets within the District Centre are evenly spread along the High Road with Aldi in the north, Iceland located centrally and Somerfield in the south. Most of Bruce Grove/Tottenham High Road District Centre is located within the Bruce Grove conservation area and the District Centre is bounded by predominantly residential areas on all sides.

Mix of Uses and Occupier Representation

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

- *convenience shopping* - including newsagents, grocers, butchers, bakers and off licences. There are several convenience stores, many of which are independent. Of the national supermarket retailers there is an Aldi, an Iceland and a Somerfield;

- *comparison shopping* - a limited selection of comparison shops, comprising of a range of independent retailers complemented with a small number of national multiple retailers;

- *services* - including a range of high street national banks, a number of cafés/restaurants/takeaways, a travel agent, laundrettes, dry cleaners and a number of hairdressers/beauty parlours; and

- *leisure and community uses* - including several pubs and bars, a snooker hall, doctor and dental surgeries and a place of worship.

10.4 Bruce Grove/Tottenham High Road has 135 retail/service units (excluding non-retail Class A uses). Table 10.1 sets out the mix of uses in Bruce Grove/Tottenham High Road shopping centre, compared with the Goad national average. The centre has a reasonable mix of uses compared with the national average. The proportion of comparison retail units is substantially below the national average while the proportion of convenience retailers is significantly above the national average. The proportion of A3/A5 units and A1 services in Bruce Grove/Tottenham High Road are above the national averages. The proportion of A2 service units is similar to the national average. The number of vacant retail/service units is lower than the national average, suggesting a reasonably good demand for premises.

Table 10.1: Bruce Grove/Tottenham High Road Use Class Mix by Unit

Type of Unit	Number of Units	Proportion of Total Number of Units (%)	
		Bruce Grove/Tottenham High Road	National Average*
Comparison Retail	42	31.6	45.4
Convenience Retail	24	18.0	9.1
A1 Services	21	15.8	10.6
A2 Services	13	9.8	9.6
A3 and A5	26	19.5	14.3
A4	2	N/A	N/A
Vacant	7	5.3	11.0
Total	**135**	**100.0**	**100.0**

Source: Goad Plans (Jan 06)
** UK average relates to all town centres surveyed by Goad Plans (Nov 07)*

Retailer Representation

10.5 Bruce Grove/Tottenham High Road 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, though these fulfil a local comparison shopping role. Table 10.2 provides a breakdown of comparison shop uses by goods categories. Most categories of retail goods are provided for within the centre. Categories that are not represented include 'variety department and catalogue', 'china, glass, gifts and fancy goods', 'booksellers, arts, crafts and stationers' and 'toys, hobby, cycle and sport'.

Table 10.2: Bruce Grove/Tottenham High Road Breakdown of Comparison Units

Type of Unit	Bruce Grove/Tottenham High Road		UK Average*
	Units	%	%
Clothing and Footwear	8	19.0	27.4
Furniture, carpets and textiles	2	4.8	8.8
Booksellers, arts, crafts and stationers	0	0.0	9.3
Electrical, gas, music and photography	8	19.0	10.1
DIY, hardware & homewares	5	11.9	6.3
China, glass, gifts & fancy goods	0	0.0	3.7
Cars, motorcycles & motor access.	2	4.8	2.9
Chemists, drug stores & opticians	9	21.5	8.7
Variety, department & catalogue	0	0.0	2.0
Florists, nurserymen & seedsmen	2	4.8	2.2
Toys, hobby, cycle & sport	0	0.0	5.3
Jewellers	3	7.1	5.1
Other comparison retailers	3	7.1	8.2
Total	**42**	**100.0**	**100.0**

Source: Goad Plans (Jan 06)
UK average relates to all town centres surveyed by Goad Plans (Nov 2007)

10.6 In comparison with the national average the centre has a relatively good proportion of 'chemists, drug stores and opticians', 'DIY, hardware and homeware' and 'electrical, gas, music and photography' stores. 'Clothing and footwear' units account for a relatively small proportion of units in comparison with the national average. The other types of retail unit highlighted are represented by similar proportions to the national average.

10.7 Major national comparison retailers present in the centre include Poundworld, Superdrug, Peacocks and Shoe Zone, though there are limited high order comparison goods retailers within the centre. Bruce Grove/Tottenham High Road is relatively close (under 1km) to Tottenham Hale Retail Park which provides a number of national multiple retailers and a comparison shopping destination in the east of the Borough.

Service Uses

10.8 Bruce Grove/Tottenham High Road has a good range of service uses, with all categories represented, as shown in Table 10.3. The centre has a broadly similar proportion of service uses to the national average though with slightly higher proportions of 'launderettes and dry cleaners', 'restaurant, cafes and takeaways' and 'hairdressers and beauty parlours' and slightly lower proportions of 'travel agents' 'banks' and 'estate agents and valuers' when compared with the national average.

Table 10.3: Bruce Grove/Tottenham High Road Analysis of Selected Service Uses

Type of Use	Bruce Grove/Tottenham High Road		UK Average*
	Units	%	%
Restaurants, cafes & takeaways	26	46.4	43.1
Banks/other financial services	5	8.9	15.4
Estate agents and valuers	5	8.9	11.7
Travel agents	1	1.9	4.9
Hairdressers & beauty parlours	15	26.8	22.0
Launderettes and dry cleaners	4	7.1	2.9
Total	**56**	**100.0**	**100.0**

Source: Goad Plans (Jan 06)
** UK average relates to all town centres surveyed by Goad Plans (Nov 2007)*
N.B. 'Restaurants, cafés and takeaways' does not include the 2 pubs in the centre

10.9 There are several high street national banks within the centre, including Abbey, Barclays, HSBC, Lloyds TSB and Halifax and there is also a Post Office. There are also several other A2 service uses including several national chain bookmakers. Overall Bruce Grove/Tottenham High Road offers a very good mix of independent shops, services and food and drink outlets, providing a reasonable localised shopping function. In addition to Class A uses there are several other community and leisure based uses including a snooker hall, a place of worship and the Bruce Grove Medical Centre.

Centre Audit

10.10 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 Bruce Grove/Tottenham High Road the primary area considered was the central area of the High Road and the secondary area considered was Bruce Grove to the west of the railway line. These areas are consistent with the primary and secondary frontages designated in the adopted UDP.

Trade Mix

10.11 As part of the study Bruce Grove 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 Bruce Grove/Tottenham High Roads' score:

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

Source: NLP Site Visit (June 2008)

10.12 The quality and proportion of specialist independent traders within both the primary and secondary areas is quite good, with a number of traders providing specialist goods and produce, including retailers providing for a range of ethnic communities. The proportion of multiple retailers was reasonable in the primary area with only a small number of national multiple outlets in addition to the national banks. However the quality of these retailers was considered poor, with them generally providing for goods at the discount end of the market, such as Aldi, Poundworld and Shoe Zone. In the secondary area there were no national multiple goods retailers, with a William Hill bookmakers the only national multiple presence.

10.13 The presence of evening economy was rated 'neither good nor poor' in the primary area with a number of restaurants present. In the secondary area there are less evening activities, although there is the Regency Banqueting Suite and a Snooker Hall on Bruce Grove.

Anti-Social Behaviour & Security

10.14 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	4	4
CCTV coverage/police presence	4	3
Frequency of street lighting	4	4

Source: NLP Site Visit (June 2008)

10.15 During NLP's visit to the centre there was little evidence of on-street drinking or begging. CCTV coverage and police presence was rated as good in the primary area with a visible police presence. In the secondary area there was no visible police presence, but there were visible CCTV cameras. The frequency of street lights rated well in both the primary and secondary areas. Overall, during the day, Bruce Grove/Tottenham High Road had a reasonably good feeling of safety.

Accessibility & Movement

10.16 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	2
Pedestrian/vehicular conflict	2	3
Traffic congestion	2	2
Frequency of pedestrian crossings	3	2
Frequency of bus stops	4	4
Quality of bus stops/shelters	4	4

Source: NLP Site Visit (June 2008)

10.17 Movement in and around Bruce Grove/Tottenham High Road is an issue due to the high volume of traffic, situation around a major junction and relatively narrow pedestrian realm. The main car parks serving the centre are the council car parks along Stoneleigh Road, to the rear of the primary area on the High Road, though these are away from the secondary area. The High Road appears to have heavy traffic, with pedestrian crossings at reasonable intervals, though on Bruce Grove these were less frequent. The primary and secondary areas both benefit from convenient and good quality bus stops.

Cleaning & Maintenance

10.18 NLP's analysis of cleanliness and maintenance within the Bruce Grove/Tottenham High Road primary and secondary areas were rated based on six separate factors.

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

Source: NLP Site Visit (June 2008)

10.19 The cleanliness and maintenance of the primary area of Bruce Grove/Tottenham High Road was poor, with a noticeable amount of litter and detritus during NLP's visit. The secondary area appeared cleaner, with less chewing gum on the pavements. There was evidence of some graffiti throughout the centre, though not significant levels, and there appeared to be little evidence of fly-posting in the primary area. The maintenance of street materials in throughout was considered reasonable. Generally the quality shop frontages and fascias were poor throughout. Many of the shop frontages are unsympathetic and poorly integrated into the good quality architecture of the buildings in which they sit.

Quality of Streetscape & Environment

10.20 The quality of the streetscape and general shopping environment in the primary and secondary areas were assessed within Bruce Grove/Tottenham High Road based on 12 separate factors. The quality of the paving throughout was rated as being of a reasonable standard, though there were only limited amounts of street furniture, with several bins but no street benches.

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

Source: NLP Site Visit (June 2008)

10.21 The attractiveness of the commercial properties in the primary area along the High Road is mixed with some good quality Victorian buildings interwoven with several modern infill buildings of less merit. In the secondary area the attractiveness of the commercial properties is more consistent with less modern infill development. In the primary area there is a lack of planting and trees, however, along Bruce Grove in the secondary area there are several mature trees and a floral display on The Regency building, adding significantly to the character of the area. Throughout the centre the quality of design of street lighting is good, with period style lampposts enhancing the streetscape. There is limited public open space in the centre and there did not appear to be any public art. The general liveliness of the centre was deemed reasonable with a good number of people using the centre, though there were very few on-street activities with the exception of a market stall.

Property Vacancies

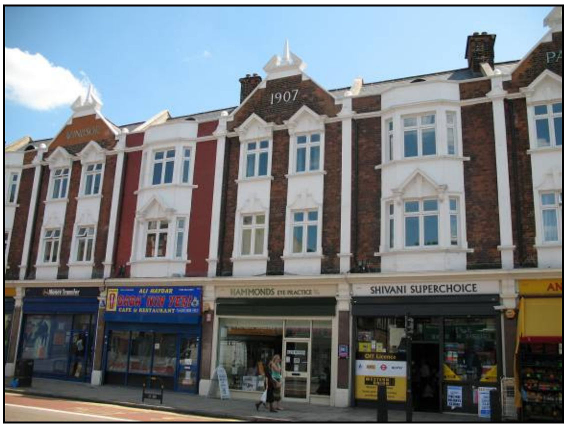
10.22 The number and concentration of shop vacancies were considered. When compared to the national average the vacancy level within Bruce Grove/Tottenham High Road is very good. On the High Road the vacant units were concentrated towards the edge of the centre. However, there was little evidence of any derelict units in the District Centre.

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

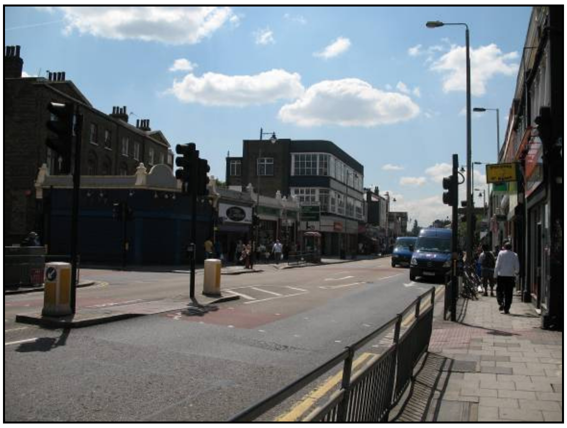
Source: NLP Site Visit (June 2008)

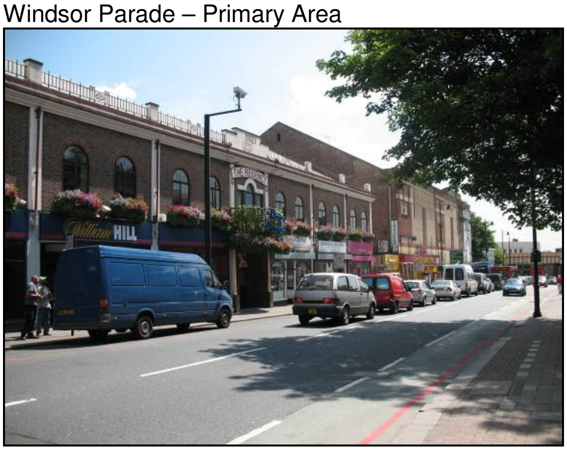
Summary

10.23 Overall the primary shopping area within Bruce Grove/Tottenham High Road is reasonable with the average score for the 35 factors totalling 2.86 (i.e. between 'neither good nor bad' and 'poor'). Several factors in the primary area were rated 'very poor' including the quantity of planting/trees and the amount of town centre parks and public open space. The general cleanliness of the centre also was considered relatively poor at the time of NLP's visit.

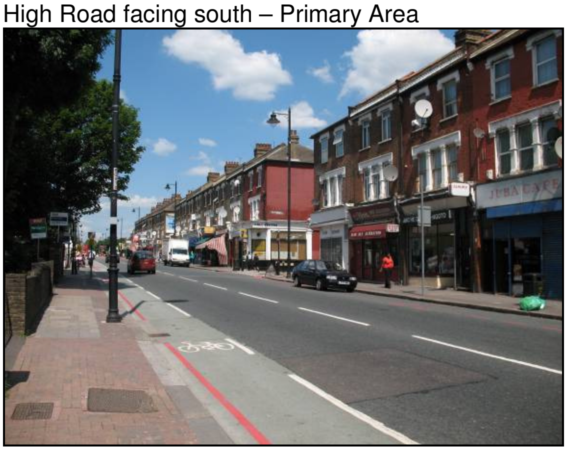


Windsor Parade – Primary Area


High Road facing south – Primary Area



The Regency, Bruce Grove – Secondary Area


Bruce Grove facing north – Secondary Area

10.24 The secondary area scored slightly better than the primary area with the average for the 35 factors totalling 2.91. The secondary area also had several factors rated 'very poor' including the proportion and quality of national multiple retailers, public art and parks/public open space. The secondary area generally scored well on the quality of the environment, especially with the good quality planting and trees.

11.0 GREEN LANES DISTRICT CENTRE

Introduction

11.1 Green Lanes in the area of Harringay is a long established shopping street. The area of Harringay built up under late Victorian urbanisation and along Green Lanes the Grand Parade was built on the east side, a row of late Victorian terraced mansion houses. Green Lanes is the main north-south route through the area and subsequently became a focus for retail and leisure activities. Today the centre serves an important local function to shoppers from the Borough and the Harringay locale. It is designated as District Centre in both the adopted Haringey UDP and the London Plan.

11.2 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.

11.3 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

11.4 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 of 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.

11.5 Green Lanes has 245 retail/service units (excluding non-retail Class A uses). This includes several units outside of the defined District Centre boundary, including units within Green Lanes local centre, as defined by the Goad Plans. Table 11.1 sets out the mix of uses in Green Lanes District Centre, compared with the Goad national average. The centre has a different mix of uses compared with the national average. The proportion of comparison retail units is substantially below the national average while the proportion of convenience retailers is significantly above the national average. The proportion of A3/A5 units and A1 and A2 service units in Green Lanes are above the national averages. The proportion of vacant retail/service units is lower than the national average.

Table 11.1: 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	54	22.5	45.4
Convenience Retail	42	17.5	9.1
A1 Services	42	17.5	10.6
A2 Services	35	14.5	9.6
A3 and A5	46	19.2	14.3
A4	5	N/A	N/A
Vacant	21	8.8	11.0
Total	**245**	**100.0**	**100.0**

Source: Goad Plans (Jan 07) (Including Green Lanes Local Centre)
** UK average relates to all town centres surveyed by Goad Plans (Nov 07)*

Retailer Representation

11.6 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 as a Metropolitan Centre, complements Green Lanes limited selection of predominantly independent comparison retailers. Table 11.2 provides a breakdown of comparison shop uses by goods categories.

Table 11.2: Green Lanes Breakdown of Comparison Units

Type of Unit	Green Lanes		UK Average*
	Units	%	%
Clothing and Footwear	6	11.1	27.4
Furniture, carpets and textiles	4	7.3	8.8
Booksellers, arts, crafts and stationers	2	3.7	9.3
Electrical, gas, music and photography	10	18.5	10.1
DIY, hardware & homewares	9	16.7	6.3
China, glass, gifts & fancy goods	0	0.0	3.7
Cars, motorcycles & motor access.	1	1.9	2.9
Chemists, drug stores & opticians	8	14.8	8.7
Variety, department & catalogue	0	0.0	2.0
Florists, nurserymen & seedsmen	2	3.7	2.2
Toys, hobby, cycle & sport	2	3.7	5.3
Jewellers	9	16.7	5.1
Other comparison retailers	1	1.9	8.2
Total	**54**	**100.0**	**100.0**

Source: Goad Plans (Jan 07) (Including Green Lanes Local Centre)
** UK average relates to all town centres surveyed by Goad Plans (Nov 2007)*

11.7 All categories except ‘variety department and catalogue’ and ‘china, glass, gifts and fancy goods’ are represented in the centre however the breakdown differs significantly from the national average. ‘Clothing and footwear’ units account for a relatively small proportion of units in comparison with the national average, as are ‘booksellers, arts, crafts and stationers’. The proportion of ‘jewellers’, ‘chemists, drug stores and opticians’, ‘DIY, hardware and homeware’ and ‘electrical, gas, music and photography’ are all higher than the national average. Other types of retail units are represented by similar proportions to national average. Major national comparison retailers present in the centre include:

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

11.8 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

11.9 Green Lanes has a good range of service uses, with all categories represented, as shown in Table 11.3. 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 11.3: Green Lanes Analysis of Selected Service Uses

Type of Use	Green Lanes		UK Average*
	Units	%	%
Restaurants, cafes & takeaways	46	47.4	43.1
Banks/other financial services	3	3.1	15.4
Estate agents and valuers	18	18.6	11.7
Travel agents	7	7.2	4.9
Hairdressers & beauty parlours	17	17.5	22.0
Launderettes and dry cleaners	6	6.2	2.9
Total	**97**	**100.0**	**100.0**

Source: Goad Plans (Jan 07) (Including Green Lanes Local Centre)
** UK average relates to all town centres surveyed by Goad Plans (Nov 2007)*
N.B. 'Restaurants, cafés and takeaways' does not include the 5 pubs in the centre

11.10 There are three high street national banks; Abbey, Nationwide 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 very good mix of independent shops, services and 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

11.11 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

11.12 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	3
Proportion of national multiple outlets	2	2
Quality of national multiple outlets	3	3
Presence of evening economy	3	3

Source: NLP Site Visit (June 2008)

11.13 The proportion of specialist independent traders within both the primary and secondary areas is quite good, with a number of traders providing specialist ethnic goods and produce. The quality of these independent traders is also 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, such as Marie Curie.

11.14 The presence of evening economy was reasonable 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

11.15 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	4	4
CCTV coverage/police presence	4	4
Frequency of street lighting	4	4

Source: NLP Site Visit (June 2008)

11.16 During NLP's visit to the centre there was very little evidence of either on-street drinking or begging. CCTV coverage and police presence was also rated as good throughout the centre with a visible police presence. 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

11.17 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	2	3
Pedestrian/vehicular conflict	2	2
Traffic congestion	2	2
Frequency of pedestrian crossings	4	4
Frequency of bus stops	4	4
Quality of bus stops/shelters	3	3

Source: NLP Site Visit (June 2008)

11.18 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 the good frequency of pedestrian crossings. 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 good, and the centre generally benefits from excellent public transport links both by bus and by rail.

Cleaning & Maintenance

11.19 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	4	3
Evidence of fly-posting	4	3
Evidence of graffiti	3	3
Maintenance of paving/street materials	3	2
Quality of shop frontages/fascia	2	2

Source: NLP Site Visit (June 2008)

11.20 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 evidence of some 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 quite poor throughout with many appearing in need of maintenance or incongruous with good quality architecture of the Grand Parade architecture.

Quality of Streetscape & Environment

11.21 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 reasonable standard within the primary shopping area, with the majority of factors rated as 'neither good nor bad'. The attractiveness of the commercial properties along Grand Parade is good as is the quality of the trees within the primary area. The secondary area's streetscape and environment is also generally reasonable, 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	3	3
Quantity of street signage/maps	3	3
Quality of design of street lighting	2	2
Quality/attractiveness of commercial properties (inc. upper floors)	4	3
Quality of planting/trees	4	3
Quantity of planting/trees	3	3
Quantity/Quality of town centre parks/public open space	2	2
Street entertainment/events/ liveliness	2	1

Source: NLP Site Visit (June 2008)

11.22 Throughout the centre the quality of design of street lighting is reasonably poor, with standard street lighting 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 poor in the primary area and very poor in the secondary area, with very few on-street activities. There was no public art within Green Lanes.

Property Vacancies

11.23 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 (June 2008)

Arena Shopping Park

11.24 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.

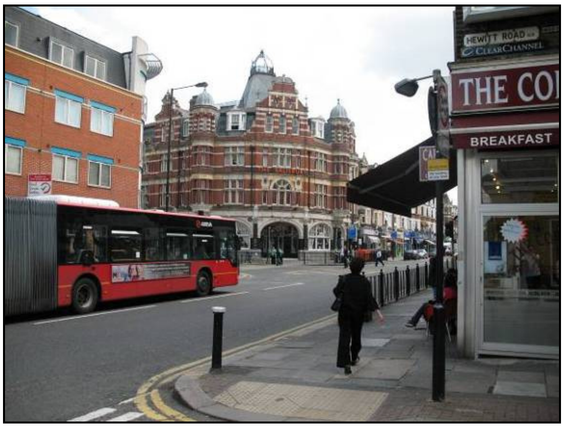
11.25 Arena Shopping Park is located on the edge of Green Lanes District Centre and has its own extensive car parking, with a significantly different retail offer to the retail units on Green Lanes. This potentially means that shoppers may visit the retail park in isolation and not necessarily visit 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

11.26 Overall the primary shopping area within Green Lanes is considered reasonable with the average score for the 35 factors totalling 3.06 (i.e. slightly better than 'neither good nor bad'). No factors in the primary area were given a rating of 'very poor' although 8 factors were rated as 'quite poor'.

Grand Parade – Primary Area

Arena Shopping Park



The Salisbury Public House – Secondary Area


Salisbury Promenade – Secondary Area

11.27 The secondary area is also considered reasonable, although the average score for the 35 factors is slightly below the primary area totalling 2.89 (i.e. 'neither good nor poor'). The only factor rated 'very poor' was the street entertainment/events and liveliness, which is potentially a side-effect of the limited amount of public space and the high levels of traffic through the centre.

12.0 WEST GREEN ROAD/SEVEN SISTERS DISTRICT CENTRE

Introduction

12.1 West Green Road/Seven Sisters is a District Centre located around Seven Sisters underground station. Tottenham High Road has its origins in roman times, with the route of West Green Road laid out during the medieval period. However, the structure of the District Centre today is more attributable to the Victorian period, with many of the buildings in the centre Victorian terraces. The centre became a important local shopping destination in the post-war period when retail units were introduced along West Green Road and it remains an important local shopping destination for the Seven Sisters locale. It is designated as District Centre in both the adopted Haringey UDP and the London Plan.

12.2 The District Centre is predominantly located along West Green Road, but also includes units on the High Road and Seven Sisters Road. The District Centre boundary also envelopes the Tesco Supermarket on the High Road. The eastern section of the District Centre on the High Road is within the Seven Sisters conservation area, whilst the western section of West Green Road is within the Clyde Circus conservation area. West Green Road/Seven Sisters District Centre is predominantly bounded by residential areas on all sides.

Mix of Uses and Occupier Representation

12.3 West Green Road/Seven Sisters shopping centre's key roles include:

- *convenience shopping* - including newsagents, grocers, butchers, bakers, off licences, a market and a fishmonger. There are several convenience stores, many of which are independent. There is also large Tesco supermarket and a small Costcutter;
- *comparison shopping* – a very limited selection of comparison shops, comprising a range of independent retailers;
- *services* - including several money/credit union shops, a large number of hairdressers and beauty parlours, cafés, restaurants and takeaways, a small number of travel agents, and dry cleaners; and
- *leisure and community uses* - including several pubs and bars, a community centre, social clubs and places of worship.

12.4 West Green Road/Seven Sisters has 173 retail/service units (excluding non-retail Class A uses). This includes several units outside of the defined District Centre boundary, including units north of Tesco on the High Road and beyond the boundary on Seven Sisters Road, as defined by the Goad Plans. Table 12.1 sets out the mix of uses in West Green Road/Seven Sisters shopping centre, compared with the Goad national average. The centre has a different mix of uses compared with the national average. The proportion of comparison retail units is substantially below the national average while the proportion of convenience retailers and A1 services are both significantly above the national average. The proportion of A2 units is also above the national average. There are a similar proportion of A3/A5 units to the national average and the proportion of vacant retail/service units is lower than the national average.

Table 12.1: West Green Road/Seven Sisters Use Class Mix by Unit

Type of Unit	Number of Units	Proportion of Total Number of Units (%)	
		West Green Road	National Average*
Comparison Retail	29	17.0	45.4
Convenience Retail	38	22.4	9.1
A1 Services	43	25.3	10.6
A2 Services	25	14.7	9.6
A3 and A5	24	14.1	14.3
A4	3	N/A	N/A
Vacant	11	6.5	11.0
Total	**173**	**100.0**	**100.0**

Source: Goad Plans (Mar 07)
** UK average relates to all town centres surveyed by Goad Plans (Nov 07)*

Retailer Representation

12.5 West Green Road/Seven Sisters has an excellent range 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. West Green Road/Seven Sisters has a very limited selection of comparison shops. Table 12.2 provides a breakdown of comparison shop uses by goods categories.

Table 12.2: West Green Road/Seven Sisters Breakdown of Comparison Units

Type of Unit	West Green Road/Seven Sisters		UK Average*
	Units	%	%
Clothing and Footwear	4	13.9	27.4
Furniture, carpets and textiles	3	10.4	8.8
Booksellers, arts, crafts and stationers	1	3.4	9.3
Electrical, gas, music and photography	9	31.0	10.1
DIY, hardware & homewares	2	6.9	6.3
China, glass, gifts & fancy goods	0	0.0	3.7
Cars, motorcycles & motor access.	1	3.4	2.9
Chemists, drug stores & opticians	5	17.3	8.7
Variety, department & catalogue	0	0.0	2.0
Florists, nurserymen & seedsmen	0	0.0	2.2
Toys, hobby, cycle & sport	1	3.4	5.3
Jewellers	1	3.4	5.1
Other comparison retailers	2	6.9	8.2
Total	**29**	**100.0**	**100.0**

Source: Goad Plans (Mar 07)
** UK average relates to all town centres surveyed by Goad Plans (Nov 2007)*

12.6 All categories except 'variety department and catalogue', 'florists, nurserymen and seedsmen' and 'china, glass, gifts and fancy goods' are represented in the centre. However the breakdown differs significantly from the national average due to the limited number of comparison retailers. The main types of unit present in the centre are 'electrical, gas, music and photography' retailers and 'chemists, drug stores and opticians' both of which are represented by several retailers with proportions significantly highly than the national average. There is a small proportion of 'clothing and footwear' retailers. All of the other categories of goods are represented by a small number of units. There are no major national comparison retailers present within the District Centre.

Service Uses

12.7 West Green Road/Seven Sisters has a reasonable range of service uses, with all categories represented, as shown in Table 12.3. The centre has significantly higher proportion of 'hairdressers and beauty parlours' compared with the national average. There are lower proportions of 'restaurants, cafes and takeaways' and 'banks and other financial services' than the national average. The proportion of 'estate agents and valuers', 'travel agents' and 'launderettes and dry cleaners' are similar to the national averages.

Table 12.3: West Green Road/Seven Sisters Analysis of Selected Service Uses

Type of Use	West Green Road/Seven Sisters		UK Average*
	Units	%	%
Restaurants, cafes & takeaways	24	35.8	43.1
Banks/other financial services	3	4.5	15.4
Estate agents and valuers	7	10.4	11.7
Travel agents	4	6.0	4.9
Hairdressers & beauty parlours	26	38.8	22.0
Launderettes and dry cleaners	3	4.5	2.9
Total	**67**	**100.0**	**100.0**

Source: Goad Plans (Mar 07)
** UK average relates to all town centres surveyed by Goad Plans (Nov 2007)*
N.B. 'Restaurants, cafés and takeaways' does not include the 3 pubs in the centre

12.8 There are no high street national banks located within the District Centre, though there are a number of money shops offering a range of financial services. There are also several other A2 service uses including several national chain bookmakers. Overall West Green Road offers a good mix of independent shops, services and food and drink outlets. West Green Road has an excellent range of independent convenience retailers, supporting the Tesco Supermarket in providing an excellent choice as a destination for main and top-up food shopping. In addition to Class A uses there are several other community and leisure based uses in West Green Road District Centre including a community centre, social clubs and places of worship.

Centre Audit

12.9 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 West Green Road/Seven Sisters District Centre the primary area considered was the eastern end of West Green Road and the frontages on the High Road. The secondary area considered was the western end of West Green Road and the frontage on Seven Sisters Road. These areas are consistent with the primary and secondary frontages designated in the adopted UDP.

Trade Mix

12.10 As part of the study West Green Road/Seven Sisters 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 West Green Road's score:

Performance Factor	Primary Area Score	Secondary Area Score
Proportion of specialist independent traders	5	4
Quality of specialist independent traders	4	3
Proportion of national multiple outlets	1	1
Quality of national multiple outlets	3	2
Presence of evening economy	1	2

Source: NLP Site Visit (June 2008)

12.11 The quality and proportion of specialist independent traders within West Green Road/Seven Sisters is very good, with more independent traders and a slightly better quality of traders in the primary area. Many of the independent traders provide specialist ethnic goods and produce, especially for convenience goods which complements Tesco as a main shopping destination. However, the proportion of multiple retailers was rated as poor with only a very small number of national multiple outlets in West Green Road/Seven Sisters District Centre. In terms of their quality the Tesco provides both comparison and convenience goods with a very wide offer, however in the secondary area, the main national multiples were Costcutter and a William Hill bookmaker.

12.12 The presence of evening economy was relatively poor in both the primary and secondary areas. In the primary area there was little in the way of evening restaurants and public houses, although the secondary area did have a number of pubs. The trade mix reflects West Green Road/Seven Sisters primary function as a day-time convenience shopping location.

Anti-Social Behaviour & Security

12.13 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	4	4
CCTV coverage/police presence	3	2
Frequency of street lighting	4	3

Source: NLP Site Visit (June 2008)

12.14 During NLP's visit to the centre there was very little evidence of either on-street drinking or begging. CCTV coverage was evident in the primary areas, though there was no visible police presence during NLP's visit. The frequency of street lights rated well in the primary area, especially on the High Road where the wide pavements had two sets of street lights, and was reasonable in the secondary area. Overall, during the day, West Green Road/Seven Sisters appeared reasonably safe, with little evidence of anti-social behaviour.

Accessibility & Movement

12.15 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	5	4
Pedestrian/vehicular conflict	3	4
Traffic congestion	4	5
Frequency of pedestrian crossings	4	4
Frequency of bus stops	4	4
Quality of bus stops/shelters	3	3

Source: NLP Site Visit (June 2008)

12.16 Movement in and around West Green Road/Seven Sisters is reasonably good, with a relatively compact centre. The multi-storey Tesco car park and the council pay and display car park on Westerfield Road are excellently located for the primary area. Along West Green Road traffic appeared very light, allowing ease of crossing and less pedestrian/vehicular conflict. In the primary area along the High Road the traffic was heavier, although there were several pedestrian crossings. The provision of bus stops is good, and the centre generally benefits from excellent public transport links both by bus and by rail.

Cleaning & Maintenance

12.17 NLP's analysis of cleanliness and maintenance within the West Green Road/Seven Sisters primary and secondary areas were rated based on six separate factors.

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

Source: NLP Site Visit (June 2008)

12.18 The cleanliness and maintenance of West Green Road/Seven Sisters was reasonable overall with most factors rated 'neither good nor poor'. Both the primary and secondary areas had average levels of litter and graffiti, with the secondary area also having average levels of chewing gum on paving and evidence of fly posting. In the primary area, especially along the High Road, there appeared to be higher levels of chewing gum on the paving and fly-posting. 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 throughout, although many did not appear in keeping with the buildings the shop units occupied.

Quality of Streetscape & Environment

12.19 The quality of the streetscape and general shopping environment in the primary and secondary areas were assessed within West Green Road/Seven Sisters based on 12 separate factors. The quality of the streetscape was rated as being of a reasonable standard within the primary shopping area, but the secondary area appeared rundown. The primary area's streetscape is reasonable with good street materials, reasonable street furniture and attractive street lighting along the High Road, though it is not reflected along West Green Road. The secondary area was rated slightly worse with standard block paving and less street furniture. There was little public art in the centre, with the only piece of note an old style painted advert on the side of a building. The attractiveness of the commercial properties throughout the centre is poor, with the Victorian terraces in places appearing poorly maintained and the modern Tesco building an imposing monolithic structure on the High Road. The level of street signage/maps also is considered poor.

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

Source: NLP Site Visit (June 2008)

12.20 There is an adequate amount of public open space in the centre with the very wide pavements on the High Road particularly good, especially where traders and street market stalls provide an element of on-street activity. Also along the High Road the large planters and mature trees soften the impact of the buildings, paving and roads.

Property Vacancies

12.21 The number and concentration of shop vacancies were considered. When compared to the national average the vacancy level within West Green Road/Seven Sisters is good. There did not appear to be any significant concentrations of vacant units.

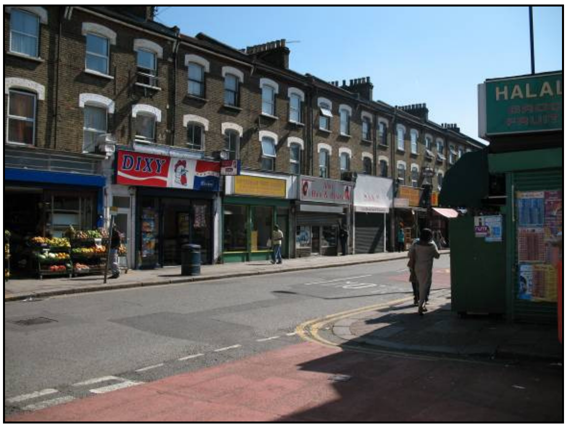
Performance Factor	Primary Area Score	Secondary Area Score
Number of vacant units	4	3
Concentrations of vacant units	3	3
Derelict/long term vacant units	4	3

Source: NLP Site Visit (June 2008)

Summary

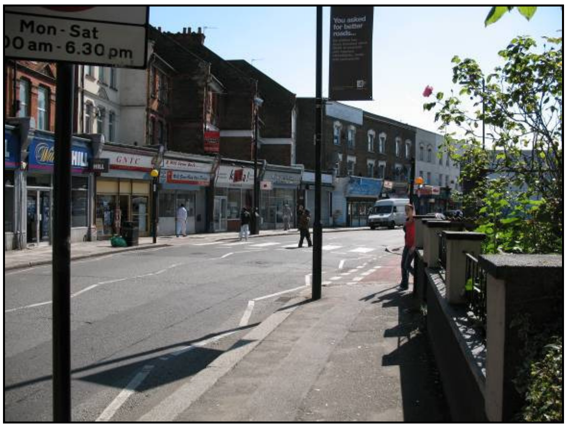
12.22 Overall the primary shopping area within West Green Road/Seven Sisters is considered reasonable with the average score for the 35 factors totalling 3.14 (i.e. between 'neither good nor bad' and 'good'). No factors in the primary area were given a rating of 'very poor' and the location and convenience of car parks was considered 'very good'.

Tesco, High Road – Primary Area



West Green Road – Primary Area

High Road –Primary Area



West Green Road – Secondary Area

12.23 The secondary area is also considered reasonable, although the average score for the 35 factors is below the primary area totalling 2.77 (i.e. between 'neither good nor poor' and 'poor'). The only factor rated 'very poor' was the quantity/quality of public art and generally the environmental quality of the secondary areas was considered below that of the primary area.

13.0 LOCAL SHOPPING PROVISION

Introduction

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

Local Needs Index

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

13.3 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 populated 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, cafe or restaurant;
- public house;
- bookmakers;
- launderette;
- hairdressers; and
- chemist.

13.4 Each local centre has therefore been allocated a score out of 11, based on the number of local shops and services 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, Craven Park Road, Hermitage Road, Midhurst Parade and Quernmore Road Local Centres all only attract score of 2 on the local needs index, which would suggest a very limited level of a 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. a grocers, local corner shop or small supermarket) in the parade is also considered.

13.5 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:

13.6 First, the relative size of an important local parade will dictate the range of shops and services each centre can offer.

13.7 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.

13.8 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.

13.9 Fourth, the relative accessibility of each centre will be an important factor in how local people use the local shops and services. For example, a major traffic route, which is difficult for pedestrians to cross, may influence shopping patterns in the area.

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

Local Needs Index Summary

13.11 Table 18.1 provides a summary of local centres within the Borough. The local shopping centres vary significantly in size, from only 4 commercial retail units (Hermitage Road) to as large as 104 (Archway Road). The key points are:

- 19 local centres are classified as small; and
- 19 local centres are classified as large.

Table 13.1: Local Needs Index Summary

Local Centre Name	Size of Centre	Total Number of Units	Local Needs Index	No. of Convenience Stores	No. of Vacant Units
Alexandra Park Road	Large	24	**8**	2	1
Archway Road	Large	104	**10**	3	24
Aylmer Parade	Small	14	**5**	1	2
Bounds Green	Large	22	**9**	2	1
Broad Lane	Large	21	**7**	2	2
Commerce Road	Small	9	**7**	1	2
Cranley Parade	Small	5	**2**	0	0
Craven Park Road	Small	5	**2**	1	3
Crescent Road	Large	25	**8**	1	4
Ferme Park Road	Small	12	**7**	1	2
Great Cambridge	Large	28	**9**	2	6
Green Lanes	Small	9	**4**	2	0
Hermitage Road	Small	4	**2**	1	0
Highgate High Street	Large	31	**8**	2	2
Hornsey High Street	Large	73	**9**	3	5
Lordship Lane East	Small	13	**5**	2	0
Lordship Lane Roundway	Large	70	**10**	6	4
Lordship Lane West	Large	29	**7**	4	1
Lordship Lane Central	Small	13	**4**	2	2
Midhurst Parade	Small	5	**2**	1	0
Myddleton Road	Large	64	**7**	3	12
Park Lane	Small	19	**9**	1	1
Park Road/Priory Road	Large	26	**8**	1	0
Philip Lane East	Small	18	**6**	2	2
Philip Lane West	Large	20	**6**	1	0
Quernmore Road	Small	10	**2**	0	4
Seven Sisters Road	Large	32	**8**	3	0
Stroud Green Road North	Small	14	**4**	0	1
Stroud Green Road South	Small	13	**5**	1	0
Tottenham Lane East	Large	39	**9**	2	11
Tottenham Lane West	Small	15	**4**	0	2
Tottenham High Road North	Large	28	**8**	1	3
Turnpike Lane	Large	87	**10**	12	4
Westbury Avenue	Small	19	**9**	3	1
West Green Road Central	Large	25	**8**	2	0
West Green Road West	Large	29	**9**	1	6
Weston Park	Small	11	**5**	1	2
Wood Green High Road North	Small	11	**5**	2	0
Totals:		996		75	110

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.

All data based upon Haringey Council Local Shopping Centre Audits (2006)

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

13.12 All of the large sized local centres are meeting most key local needs. Based on the local needs index, 15 of the 19 large sized local 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, whilst only one large sized local centre is meeting 6 of the identified local needs. In general the large sized local centres provide a good local shopping offer for local residents.

13.13 Of the 19 small local centres within the Borough there is a wide range of scores on the local needs index. Park Lane and Westbury Avenue Local Centres meet 9 local needs, whereas Cranley Parade, Craven Park Road, Hermitage Road, Midhurst Parade and Quernmore Road Local Centres all only score 2, although four of these only have five or less units. A further four small local centres meet 4 local needs, whilst the remaining eight small local centres score reasonably meeting between 5 and 7 local needs.

13.14 Four of the local centres were identified as not being able to provide for convenience top-up shopping as they did not have a shop capable of meeting this need. 12 of the local centres had a vacancy rate of greater than 15.0%, significantly higher than the national average of 11.0%. The close proximity of small local parades to other centres is generally reflected in the range of services they provide.

The Need for New Local Centres

13.15 Plan 3 in Appendix J shows the areas of the Borough that are beyond 400 metres of a Metropolitan, District or Local Centre. 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.

14.0 THE NEED FOR NEW RETAIL DEVELOPMENT

Introduction

14.1 This section assesses the quantitative and qualitative scope for new retail floorspace in the London Borough of Haringey during the period from 2008 to 2021. 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.

14.2 All monetary values expressed in this analysis are at 2006 prices, consistent with Experian's base year expenditure figures for 2006. Expenditure data for 2007 and 2008 is not currently available and 2006 is the most up to date information.

Methodology and Data

14.3 The quantitative analysis is based on a study area defined for the shopping facilities in the Borough along with nearby centres outside the Borough, for example, Walthamstow, Brent Cross, Enfield, Finsbury Park and Stratford. The study area has been divided into 10 zones or sectors (1 to 10) for more detailed analysis.

14.4 The study area is shown in Appendix A. The extent of the study area is based on postcode area boundaries and the proximity of competing shopping destinations, i.e. shopping facilities within the Borough are expected to attract a significant proportion of their trade from residents within the study area, although there will be an element of trade drawn from beyond the study area.

14.5 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 2006 have been obtained.

14.6 Experian's latest national expenditure projections between 2008 and 2016 have been used to forecast expenditure within the study area. Unlike previous expenditure growth rates provided by The Data Consultancy (formerly URPI), which were based on past trends, Experian's projections 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 disaggregated consumer spending volumes, prices and value. The model incorporates assumptions about income and price elasticities.

14.7 Experian provides recommended growth rates for the period 2007 to 2011, and 2007 to 2016. The recommended growth rates for the period 2007 and 2011 are 0.7% per annum for convenience goods and 3.8% per annum for comparison goods. These growth rates have been used in this study to forecast expenditure per capita up to 2011. Adjusted growth rates (0.9% and 3.2% per annum for convenience and comparison goods respectively) have been adopted to project expenditure between 2011 and 2016, consistent with Experian's overall growth forecasts for 2007 to 2016. Growth in expenditure beyond 2016 is based on 0.8% and 3.5% per annum for convenience and comparison goods respectively, in line with Experian's growth forecast for 2007 to 2016.

14.8 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 including:

- information from the household and in-street survey results;
- the level and quality of retail facilities and retail floorspace surveys; and
- the relative distance between shopping centres and study area zones.

14.9 The total turnover of shops within the study area is estimated based on expected penetration rates and the expected level of expenditure inflow. These turnover estimates are converted into average turnover to sales floorspace densities. Turnover densities are compared with company average turnover to sales floorspace densities for and benchmark turnover levels in order to identify potential surplus capacity or deficit.

Population and Spending

14.10 The study area population for 2001 to 2021 is set out in Table 1B in Appendix B, based on the 2001 Census and the GLA's 2007 (Low Post London Plan) ward based population projections. Population in the study area is forecast to increase by 5.3% between 2001 to 2021. Table 2B in the Appendix B sets out the forecast growth in spending per head for convenience goods within each zone in the study area. Comparison forecasts of per capita spending are shown in Table 1C.

14.11 The levels of available spending are derived by combining the population in Table 1B and per capita spending figures in Tables 2B and 1C. For both comparison and convenience spending, a reduction has been made for special forms of trading such as mail order, e-tail (non-retail businesses) and vending machines.

14.12 Special Forms of Trading (SFT) and non-store activity is included within Experian's goods based expenditure estimates. *"Special forms of trading"* 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 to the demand for retail floorspace.

14.13 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 has attempted to provide projections for special forms of trading and E-tailing (Retail Planner Briefing Note 5.1 – November 2007).

14.14 This Experian information suggests that non-store retail sales in 2008 is:

- 5.6% of convenience goods expenditure; and
- 12.1% of comparison goods expenditure.

14.15 Experian predicts that these figures will increase to 7.3% and 14.4% by 2013, and will then stabilise thereafter.

14.16 For convenience expenditure in 2008, 5% of the 5.6% is estimated to be E-tailing, and the rest 0.6% is other forms of SFT e.g. mail order. E-tailing in 2004 was broken down into E-tailing through retail businesses (e.g. Tesco and Sainsbury) at 1.1% and non-retail businesses (0.5%). The E-tailing split for retail and non-retail businesses was approximately 70:30 in 2004.

14.17 For comparison expenditure in 2008, 9.5% of the 12.1% is estimated to be E-tailing, and the rest 2.6% is other forms of SFT e.g. mail order. E-tailing through retail businesses (e.g. Next and Argos) was 1.3% and for non-retail businesses 1.8% (e.g. Amazon) in 2004. The E-tailing split for retail and non-retail businesses was approximately 40:60 in 2004.

14.18 Experian provide projections for E-tailing and other SFT. These projections have been used to exclude expenditure attributed to e-tailing through non-retail businesses, which will not directly impact on the demand for retail floorspace. Based on Experian data SFT (including non-retail e-tailing but excluding e-tail through retail businesses) is 2.0% and 8.3% of total convenience and comparison goods expenditure respectively in 2008. The projections provided by Experian suggest that these percentages could increase to 2.5% and 9.2% by 2012. The amount of e-tail expenditure through non-retail businesses is expected to increase significantly in proportional terms, but as a proportion of total expenditure this sector is expected to remain relatively insignificant for the foreseeable future.

14.19 The levels of available spending are derived by combining the population in Table 1B and per capita spending figures in Tables 2B and 1C (See Appendix A, B and C). For both comparison and convenience spending, a reduction has been made for special forms of trading such as mail order and vending machines.

14.20 As a consequence of growth in population and per capita spending, convenience goods spending within the study area is forecast to increase by 14.1% from £824.17 million in 2008 to £940.44 million in 2021, as shown in Table 3B.

14.21 Comparison goods spending is forecast to increase by 58.8% from £1,449.32 million in 2008 to £2,302.16 million in 2021, as shown in Table 2C. These figures relate to real growth and exclude inflation.

Existing Retail Floorspace

14.22 Existing convenience goods retail sales floorspace within Haringey is 43,134 sq m net as set out in Table 1A, Appendix A. This floorspace figures excludes comparison sales floorspace within food stores (6,478 sq m net within the Borough).

14.23 Comparison goods retail floorspace within the London Borough of Haringey is 99,826 sq m net as shown in Tables 3A, Appendix A. This figure includes comparison sales floorspace within large food stores (6,478 sq m net).

Existing Spending Patterns 2008

Convenience Shopping

14.24 The results of the household shopper and in-street visitor surveys undertaken by Research & Marketing in June 2008 have been used to estimate existing shopping patterns within the study area. The estimates of market share or penetration within each study area zone are shown in Table 4B, Appendix B.

14.25 The level of convenience goods expenditure attracted to shops/stores in the London Borough of Haringey in 2008 is estimated to be £338.48 million as shown in Table 5B, Appendix B. The market share for the Borough's stores/shops within the study area as a whole is estimated to be about 41%. However, the proportion of expenditure attracted to facilities in Haringey varies within different parts of the study area. Expenditure attracted to facilities in the Borough is highest in the more central zones, with between 51% and 81% of expenditure attracted to facilities in Zones 1, 2, 3, 7 and 8. The level of expenditure attracted to facilities in the Borough is lowest in the peripheral zones that lie predominantly outside the Borough i.e. zones 4, 5, 9 and 10. One would expect Haringey's market share to be much lower in these zones. Many residents within these zones have good access to other large food stores in other Boroughs (e.g. in Enfield, Barnet, Waltham Forest, Islington and Camden).

14.26 Company average turnover to sales floorspace densities are available for major food store operators. 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 listed in Table 1A, Appendix A, 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 helpful benchmark for assessing existing shopping patterns and the adequacy of current floorspace in quantitative terms. Estimates for comparison sales floorspace within large food stores have been deducted from the figures in Table 1A, for consistency with the use of goods based expenditure figures.

14.27 Average sales densities are not widely available for small convenience shops, particularly independent retailers. We have assumed an average sales density for small convenience shops in the Borough of £4,000 per sq m net. The total benchmark turnover of existing convenience sales floorspace within the Borough is £276.80 million.

14.28 Our assessment suggests convenience goods expenditure attracted to the Borough in 2008 is £338.48 million, which suggests that convenience sales floorspace is collectively trading about 22% above the benchmark turnover, +£61.68 million. However there are variations in the trading performance of stores and areas within the Borough. The areas that appear to be trading the highest, when compared with their benchmark turnovers are Muswell Hill and Crouch End (+£37.70). The estimates of available expenditure are summarised and compared with the benchmark turnover in Table 14.1.

Table 14.1: Convenience Trading Levels in 2008 (£ millions)

Centres	Available Expenditure	Benchmark Turnover	Difference
Wood Green/Green Lanes	£137.67	£127.59	+£10.08
Muswell Hill/Crouch End	£99.52	£61.82	+£37.70
Bruce Grove/Tottenham High Road/West Green Road/Seven Sisters	£101.28	£87.39	+£13.89
TOTAL	**£338.48**	**£276.80**	**+£61.68**

Source: Table 1A (Appendix A) and Table 5B & 10B (Appendix B)

Comparison Shopping

14.29 The estimated comparison goods expenditure currently attracted by shopping facilities within the Borough is £517.55 million in 2008, as shown in Table 3C, Appendix C. This expenditure figure is based on the household survey results. The market share of the Borough within the Study Area as a whole is estimated to be about 29%. Comparison expenditure attracted to shopping destinations outside the Borough is relatively high across all zones, ranging from 43% in Zone 7 (Bruce Grove/Tottenham High Road) to 94% in Zone 9 (Walthamstow). The main comparison destinations outside the Borough in terms of expenditure from the study area as a whole are:

- Central London = £226 million (15%)
- Brent Cross = £153 million (10%); and
- Enfield = £144 million (10%).

14.30 These comparison shopping patterns indicate that residents have a wide choice of comparison shopping destinations, which are reasonably accessible by car or public transport. It is unlikely that any households will do all of their comparison shopping at one destination, and one would expect cross flows of expenditure into and out of the Borough. This pattern of shopping is likely to continue in the future.

14.31 The level of expenditure attracted to each destination in the Borough is shown in Table 14.2 below. The average sales density of all comparison sales floorspace in the Borough is estimated to be £5,185 per sq m net. However, there is a wide variation in the sales density achieved by each centre. Muswell Hill/Crouch End (West Haringey) has the highest sales density (£6,813 per sq m net), followed by

Wood Green/Green Lanes (Central Haringey) (£5,145 per sq m net). Bruce Grove/Tottenham High Road/West Green Road/Seven Sisters/Tottenham Hale Retail Park (East Haringey) has the lowest average sales density (£4,881 per sq m net).

Table 14.2: Comparison Trading Levels in 2008

Centres	Available Expenditure £M	Comparison Sales Floorspace Sq M Net	Average Sales Density £ Per Sq M Net
Wood Green/Green Lanes (inc Arena Park)	£281.02	54,622	£5,145
Muswell Hill/Crouch End	£95.12	13,962	£6,813
Bruce Grove/Tottenham High Road/West Green Road/Seven Sisters/Tottenham Hale Retail Park	£118.32	24,242	£4,881
Other destinations/local shops	£23.09	7,000	£3,299
TOTAL	**£517.55**	**99,826**	**£5,185**

Source: Table 2A (Appendix A) and Table 3C & 7C (Appendix C)

14.32 Available information indicates that sales densities amongst comparison retailers vary significantly. Mintel's Retail Rankings 2008 provided company average sales density information for a selection of national high street retailers. The average for high street multiple comparison retailers, where sales density data is available within Mintel's Retail Rankings, is £5,808 per sq m net, as shown at the end of Appendix A. Based on our recent experience across the country average sales densities for comparison floorspace within town centres can range from £3,000 to £7,000 per sq m net, and the Mintel average is broadly in the middle of this range. The higher end of this range is usually only achieved by very successful shopping centres, which reflects the higher proportion of quality multiple retailers and high rental levels/property values. The appropriate average for a centre is also affected by the amount of primary and secondary floorspace and the balance between multiple retailers and small independent traders.

14.33 Based on this information, comparison shopping facilities in Wood Green, Green Lanes, Muswell Hill, Crouch End, Bruce Grove/Tottenham High Road and West Green Road/Seven Sisters are on average trading satisfactorily.

The Potential Impact of the Growth in Home Shopping

14.34 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 Haringey. Therefore, it will be necessary to carefully monitor the growth within this sector particularly in the long term and the effect that it may have on diverting expenditure that might otherwise be spent in shops.

14.35 In broad terms, home/electronic shopping from non-retail businesses is classified by Experian as *"special forms of trading"*, as mentioned previously, this includes other forms of retail expenditure not spent in shops e.g. mail order. Special forms of trading have been excluded from the quantitative capacity analysis within this study because this expenditure does not affect the need 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. 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.

14.36 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. However, there is still uncertainty about its longer-term prospects. Verdict Research suggests that online retail sales could account for about 6.8% of total retail sales by 2010, which is consistent with Experian's projections. However, if this growth is achieved it may (to a large extent) be at the expense of other forms of home shopping such as catalogue and mail order shopping. In addition 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.

Quantitative Capacity for Additional Convenience Floorspace

14.37 The level of available convenience goods expenditure in 2011, 2016 and 2021 is shown at Tables 7B to 9B in Appendix B, and summarised in Table 10B. The future expenditure projections are based on the existing 2008 market shares derived from the household survey results, adjusted to take into account the Asda at Edmonton Green that is due to open in late Summer 2008.

14.38 The total level of convenience goods expenditure available for shops in Haringey Borough at 2011, 2016 and 2021 are summarised in Table 10B in Appendix B. This table takes into account the population and expenditure projections shown in Table 1B to 3B in Appendix B. The benchmark turnover of existing convenience floorspace has been subtracted from the estimates of available expenditure to provide surplus expenditure estimates, as shown in Table 10B, Appendix B.

14.39 Table 10B assumes that the benchmark turnover of existing convenience floorspace within the Borough will increase in real terms in the future, an increase of 0.3% per annum. PPS6 indicates that retail studies should assess the potential for existing floorspace to increase its productivity in the future.

14.40 Historically limited or no growth in turnover density has been assumed by most retail planners for convenience floorspace. However, recent information published by Experian recommends a growth rate of 0.6% per annum (Source: Experian Retail Planner Briefing Note 5.1) for convenience goods. There are a number of reasons why we consider this figure is too high to be applied in studies of local catchment areas.

- The historic trends measure increases in sales density on gross floorspace. Over time there has been a trend towards increased net to gross ratios both in existing stores and as new floorspace adds to and replaces older floorspace. This means that a constant sales density on net floorspace will have led to an increase in sales density on gross floorspace. As our analysis going forward deals with net floorspace some allowance should be made to strip out this effect;

- As Experian recognise, past growth in sales density will have been influenced by one-off changes such as the introduction of Sunday trading and significant increases in trading hours which are unlikely to be repeated to the same extent in the future;

- Experian's historic analysis includes the effect of old floorspace being replaced and added to by more modern and efficient floorspace potentially with higher sales densities. The growth rate measured therefore is not simply an increase in sales density on a static stock of floorspace. At the local level our figures make specific allowance for changes in sales density that will arise from new commitments and proposals trading at modern sales density and a separate assumption is needed for the change in sales density on the stock of existing floorspace.

14.41 For these reasons, we consider a sales density increase rate significantly lower than Experian's recommended rate of 0.6% is appropriate and we adopt a growth rate of 0.3% for convenience goods floorspace. We believe the reduction from 0.6% to 0.3% is robust and is if anything a conservative reduction given the factors listed above.

14.42 The surplus expenditure projections are converted into potential new floorspace, also shown in Table 10B Appendix B. The figures assume a turnover density for new floorspace for large stores of £10,000 per sq m and a turnover density for small shops/stores of £5,000 per sq m (inflated by 0.3% per annum up to 2021), reflecting the current mix of large and small food stores in the Borough, and the current benchmark average turnover density of £5,185 per sq m.

14.43 By 2011, estimated convenience expenditure is projected to exceed the benchmark turnover of existing floorspace in the Borough by £65.53 million, see Table 10B in Appendix B. By 2016, estimated convenience expenditure is projected to exceed the benchmark turnover by £87.01 million. These surplus expenditure figures indicate that further convenience retail development could be supported in Haringey.

14.44 The floorspace projections at the bottom of Table 10B Appendix B, suggest that about 6,796 sq m net (9,709 sq m gross) of convenience goods retail floorspace could be accommodated in large stores and 3,398 sq m net (4,854 sq m gross) of convenience goods floorspace could be accommodated in small shops/stores in the Borough by 2016. This is based on an 80:20 split of expenditure between large foodstores with a turnover of £10,000 per sq m and small shops/stores with a turnover of £5,000 per sq m. This scale of convenience sales floorspace could be difficult to physically accommodate within the Borough's existing centres.

14.45 Existing major commitments with planning permission in the Borough (shown in Table 3A Appendix A) are expected to provide an additional 1,155 sq m net of convenience floorspace. Other major proposals in the pipeline, but without planning permission (shown in Table 4A Appendix A) are expected to include only a small proportion of convenience floorspace (approx 128 sq m net). If implemented these commitments and proposals will only absorb a small amount of the existing convenience retail floorspace capacity in the Borough, approximately 50% of the small shops/stores capacity.

14.46 It may not be necessary to accommodate the entire food store projection, because it may be reasonable to expect food stores in Haringey to trade above national average densities, due to higher customer expenditure and overhead.

Quantitative Capacity for Additional Comparison Floorspace

14.47 The assessment of existing shopping patterns in 2008 indicates that there is a relatively high level of comparison expenditure leakage from across the Borough to other destinations. One would expect comparison expenditure outflow to continue to large centres including Central London, Brent Cross and Enfield. There will also be cross flows of expenditure to and from the Borough to neighbouring boroughs i.e. Barnet, Enfield, Islington, Camden, Waltham Forest and Hackney.

14.48 The future expenditure projections are based on the assumption that the Borough will maintain its existing 2008 market shares derived from the household survey results. We have projected the level of comparison goods expenditure available to shops in the London Borough of Haringey at 2011, 2016 and 2021, as shown in Tables 4C to 6C in Appendix C.

14.49 Major retail development in the Borough could change existing shopping patterns and could reduce comparison expenditure leakage. Conversely improvements to comparison retailing in competing centres may increase expenditure leakage from the study area. The London Plan Sub-Regional Development Framework for North London (May 2006) identifies a number of strategically significant retail developments in North London and other parts of London in the pipeline. Comparison developments listed (Table 1C.3 Annex 4) that could affect shopping patterns in the study area included:

- Brent Cross Extension - 55,000 sq m;
- Stratford - 143,000 sq m; and
- Kings Cross - 25,000 sq m.

14.50 However, this list included developments without planning permission. Some of these development proposals and other proposals in pipeline are at an early stage and are not technically planning commitments, e.g. the Brent Cross Extension. The implementation and timing of these developments is uncertain. Nevertheless, it is reasonable to assume that major improvements to comparison shopping facilities will be implemented in neighbouring Borough in next decade. The retail assessment assumes these development will be implemented (completed and trading to their full potential in the period 2011 to 2016.

14.51 From 2011 onwards market shares are assumed to remain constant on the basis that the above strategically significant developments are some distance from the Borough and emerging developments in neighbouring Boroughs will be counter-balanced by improvements to comparison shopping provision in the Borough.

14.52 The growth in comparison goods expenditure available for shops in the Borough between 2008 and 2021 is summarised in Table 7C, in Appendix C. Future available expenditure is compared with the projected turnover of existing retail floorspace in order to provide estimates of surplus expenditure. This table takes into account the population and expenditure projections shown in Table 1B, 1C and 3C in Appendix B and C.

14.53 Surplus expenditure projections are converted into new comparison goods floorspace at the bottom of Table 7C Appendix C. New floorspace is expected to have an average sales density of £5,185 per sq m net in line with the 2008 Borough wide average sales density and inflated by 1.5% per annum up to 2021.

14.54 Table 7C assumes that the benchmark turnover of existing and new comparison floorspace within the Borough will increase in real terms in the future, an increase of 1.5% per annum.

14.55 Historically a growth rate of between 1% to 1.5% per annum has been widely adopted by retail planners. 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. Allowing for this growth to be absorbed by existing retailers represents a cautious approach to forecasting future needs, and this allowance may help existing centres maintain their vitality and viability in the future. It effectively allows for existing retail outlets to increase their turnover to help them to compete with new provision.

14.56 Recent information provided by Experian recommends a slightly higher growth rate of 2.2% per annum based on a historic trend of 2.5% per annum. However, we believe this recommended range of rates is too high for application to this study, primarily for the following reasons:

- Experian's growth rate is based on past trends during the period 1986 to 1999. During this period comparison expenditure grew rapidly (5.8% per annum) in part fuelled by growth in audio visual equipment with an associated trend for many electronic items to become smaller and the growth of the mobile phone market. It is uncertain whether there is scope for this change to continue at this rate and the forecast rate of growth in comparison expenditure. Growth in turnover efficiencies and expenditure growth are likely to have been linked in the past and therefore it is unlikely that historic rate of growth in turnover efficiencies will be experienced.

- Experian's historic analysis includes the effect of old floorspace being replaced and added to by more modern and efficient floorspace potentially with higher sales densities. The growth rate measured therefore is not simply an increase in sales density on a static stock of floorspace. At the local level our figures make specific allowance for changes in sales density that will arise from new commitments and proposals trading at modern sales density and a separate assumption is needed for the change in sales density on the stock of existing floorspace.

- The historic trends measure increases in sales density on gross floorspace. Over time there has been a trend towards increased net to gross ratios both in existing stores and as new floorspace adds to and replaces older floorspace. This means that a constant sales density on net floorspace will have led to an increase in sales density on gross floorspace. As our analysis going forward deals with net floorspace some allowance should be made to strip out this effect. The growth in retail warehouses with very limited storage and backstage space will have contributed to this increase in net to gross ratio.

14.57 Furthermore existing comparison sales floorspace in the Borough appears to be trading satisfactorily. For these reasons we adopt a turnover efficiency of 1.5% per annum, slightly lower than the range recommended by Experian, and consistent with the top end of the range historically adopted by retail planners.

14.58 By 2011, estimated comparison expenditure is projected to exceed the benchmark turnover of existing floorspace in the Borough by £43.69 million, as shown in Table 7C in Appendix C. By 2016, estimated comparison expenditure is projected to exceed the benchmark turnover by £108.05 million. These surplus expenditure figures indicate that further comparison floorspace development can be supported in the Borough in the short to medium term. The floorspace projections in Table 7C Appendix C, suggest that about 8,000 sq m net (10,700 sq m gross) could be accommodated by 2011, increasing to 18,500 sq m net (24,700 sq m gross) by 2016.

14.59 Existing major commitments with planning permission in the Borough (shown in Table 3A Appendix A) are expected to provide an additional 10,840 sq m gross of comparison floorspace. Other major proposals in the pipeline, but without planning permission (shown in Table 4A Appendix A) are expected to provide an additional 244 sq m gross of comparison floorspace. If implemented these commitments and proposals will absorb comparison retail floorspace capacity in the Borough up to about 2011, and would account for about 45% of the floorspace projection up to 2016 (24,666 sq m gross).

14.60 Allowing for commitments with planning permission, the remaining comparison floorspace projection for the period 2011 to 2016 is 13,800 sq m gross, and a further 19,600 sq m gross could be required between 2016 and 2021. The total projection (allowing for commitments with planning permission) is 33,400 sq m gross between 2011 and 2021.

The Qualitative Need for Retail Development

Food and Grocery Shopping

14.61 Most households tend to undertake two kinds of food and grocery shopping trips, i.e. a *main* shopping trip generally made once a week or less often and *top-up* shopping trips made more frequently. Many households will also undertake bulk food shopping trips, particularly households who have access to a car for shopping. The availability of a wide range of products and free surface level car parking are important requirements for bulk food shopping trips. Large supermarkets or superstores, defined as over 2,500 sq m net or more in PPS6, are the usual destination for these types of shopping trip. The provision of food stores in the Borough are shown in Table 1A in Appendix A.

14.62 There are three food superstores in the Borough (PPS6 definition), i.e. Morrison's at Wood Green, Sainsbury's at Arena Park, Green Lanes and Tesco in West Green Road/Seven Sisters District Centre. There are also superstores outside the Borough but close to the Borough boundary such as the Tesco store at the Coppetts Centre on the North Circular and the proposed Asda at Edmonton Green,

14.63 In addition to these superstores, there are also three other large food stores (with a sales area of between 1,000 to 2,500 sq m net) within the Borough, which are suitable for main and bulk food shopping, i.e. Sainsbury's on Fortis Green Road in Muswell Hill, Sainsbury's at 48-54 High Road in Wood Green and Sainsbury's at 867-869 High Road.

14.64 These food stores are the dominant shopping destinations used by residents in the Borough for main/bulk food shopping. Households in the west and central parts of the Borough have a relatively good choice of large food stores, however, residents in the west of the Borough have limited choice with only one store over 1,000 sq m (Sainsbury's, Fortis Green Road, Muswell Hill). This is particularly the case for residents in the southwest of the Borough where there is limited large food store provision in neighbouring authorities.

14.65 These large food stores are supported by a relatively good range of smaller supermarkets and convenience stores, as shown in Tables 1A and a large number of small convenience shops. There are a number of small stores (200 sq m net to 1,000 sq m net) that provide basket and top-up shopping facilities including three M&S Simply Food stores/food halls, five Tesco Express stores and one Sainsbury Local store. There are two discount food retailers within the Borough i.e. a Lidl store at Tottenham Hale Retail Park and an Aldi in Bruce Grove/Tottenham High Road District Centre.

High Street Comparison Shopping

14.66 A detailed audit and qualitative analysis of shopping provision within the Metropolitan and District centres is set out in Sections 7 to 12. Haringey has one Metropolitan Centre (Wood Green) in line with the London Plan. It also has five District centres (Green Lanes, Muswell Hill, Crouch End, West Green Road/Seven Sisters and Bruce Grove/Tottenham High Road). The Borough also has one retail park, Tottenham Hale Retail Park. These centres are compared in Table 14.3 below.

Table 14.3: Main Centres and Retail Parks in Haringey

Centres	Number of Comparison Shops	Comparison Sales Floorspace Sq M Net
Wood Green	185	36,425
Green Lanes	54	18,197
Muswell Hill	78	6,405
Crouch End	92	7,557
West Green Road/Seven Sisters	29	2,827
Bruce Grove/Tottenham High Road	42	4,624
Tottenham Hale Retail Park	14	16,791

Source: Table 2A (Appendix A).

14.67 Table 14.3 suggests that Wood Green Metropolitan Centre is the main centre in terms of comparison shopping offer, followed by Green Lanes, Crouch End and Muswell Hill District Centres. Tottenham Hale Retail Park is also a main destination in terms of comparison shopping offer.

14.68 These centres provide a good range of comparison shopping destinations across the centre and south of the Borough, however there is limited comparison provision in the north of the Borough. Nevertheless, residents in the north of the Borough 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 8) mainly undertake their non-food shopping outside the Borough in Enfield.

14.69 Overall, residents in the Borough have a large choice of shopping destinations both within and outside the Borough. Central London is a key shopping location as well as Brent Cross to the west.

Large Format Stores/Retail Warehouses

14.70 Tottenham Hale Retail Park is the main location for retail warehouses in the Borough. The retail park has approx 16,791 sq m net of comparison retail floorspace including:

- Currys;
- Carpetright;
- PC World;
- Comet;
- Halfords;
- Staples; and
- B&Q.

14.71 The Retail Park also includes a selection of traditionally High Street stores:

- Argos;
- Asda Living;
- JD Sports;
- Boots;
- Next;
- Carphone Warehouse; and
- Blockbuster.

14.72 Tottenham Hale Retail Park is situated to the far east of the Borough next to the boundary with the London Borough of Waltham Forest. There are also several retail warehouses within Arena Park which is within Green Lanes District Centre:

- Sports Direct;
- Homebase;
- Carphone Warehouse;
- Peacocks;
- Superdrug;
- Next; and
- Argos.

14.73 As with Tottenham Hale Retail Park, several of the retailers on Arena Retail Park are traditionally High Street stores such as Next, Superdrug and Peacocks.

14.74 Retail warehouses in London are generally concentrated in outer London Boroughs. For example, within North London there are concentrations of retail warehouses in Enfield (Colosseum Retail Park, De Mandeville Retail Park and Enfield Retail Park), Edmonton (Eleys Retail Park and Ravenside Retail Park) and Chingford (Cork Tree Way Retail Park).

14.75 Residents also have good access to Friern Bridge Retail Park which is just outside the Borough boundary to the west in the London Borough of Barnet. It has a range of stores including Curry's, Comet, MFI, Harveys, Halfords, Carpet Tight and Sports World.

14.76 The existing provision of retail warehouse stores within the Borough is relatively good. The provision may not be evenly distributed within the Borough, however, residents also have good access to retail warehouses in neighbouring boroughs close the Haringey boundary.

14.77 The household survey results indicate that for electrical purchases most respondents visit Brent Cross or Wood Green or purchase goods online. For furniture and soft furnishings, the household survey indicated that respondents purchase goods in Enfield, Brent Cross or Central London and for DIY goods the survey results indicated that most respondents were visiting Enfield, Homebase in New Southgate or one of the two DIY warehouses within the Borough.

14.78 The existing DIY provision within the Borough along with the provision of electrical/furniture retailers in Brent Cross, Enfield and Central London and other major centres may limit the demand for further warehouse provision within the Borough. Any retail warehouse proposals would need to be considered on their individual merits. The applicant would need to clearly demonstrate that the nature of retail floorspace proposed could not be adequately accommodated within existing centres.

Local Shops and Services

14.79 As shown in Section 13 and on Plan 3 in Appendix J, 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.

14.80 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.

Occupier Demand

14.81 The floorspace projections set out in this section provide an indication of the theoretical scope for new retail development based on expenditure projections. It is also necessary to consider the potential level of demand from operators for new floorspace within the Borough.

14.82 A postal questionnaire was sent to over 300 national/regional multiple retailers and leisure operators, in order to ascertain their potential space requirements in Haringey. The results from 21 responses are summarised in Appendix D. This canvas of operators identified only 14 operators with space requirements in Haringey. Significantly though, these requirements include major space requirements within the Borough for multiple comparison retailers including WH Smith, Sports World, Wicks, Staples and New Look. Somerfield, Lidl and Netto indicated that they had requirements for new convenience stores within the Borough. 7 operators suggested they do not have a requirement for space in Lambeth.

14.83 Multiple retail operators' space requirements across the country are often publicised. Published requirements registered by Estates Gazette (EGi) for floorspace in the Borough's centres during the last six months are shown in Appendix D. In total 13 requirements are listed for centres in the London Borough of Haringey, of which 9 are comparison retailers. If correct, the canvas of operators and EGi highlight that there is some demand for floorspace across the borough from a range of operators, however, as it is a London Borough we would anticipate more demand than that indicated.

15.0 CONCLUSIONS AND RECOMMENDATIONS

15.1 This report provides a borough wide needs assessment for retail in the London Borough of Haringey. It provides a guide to the shopping needs of the Borough up to 2011, 2016 and 2021. The principal conclusions of the analysis contained within this study are summarised below.

Meeting Shopping Needs in LB of Haringey

15.2 Overall, 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, in line with PPS6, to identify opportunities to accommodate growth.

15.3 The floorspace projections shown in this report provide broad guidance. Meeting the projections between 2008 and 2016 remains the priority. The projections should not be considered to be maximum or minimum limits or targets, particularly when translated into the development plan allocations or when used to guide development control decisions. For instance if a major scheme comes forward within a designated centre in the period to 2016, although the implementation of this proposal may possibly result in an over-supply of comparison retail floorspace, it may be acceptable to permit such a scheme if it is of an appropriate scale in terms of the role and function of that centre. Such floorspace limits should not inhibit competition between retailers when located within centres, subject to the consideration of scale and impact. However, if an out of centre proposal exceeds the floorspace projections then the need for the proposal and impact will need to be carefully considered.

15.4 Long term forecasts (beyond 2016) may be more susceptible to change, due to unforeseen circumstances. Projected surplus expenditure beyond 2016 is attributable to projected growth in spending per capita, extrapolated from short to medium term 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. The implications of major retail development within and surrounding the Borough should also be monitored and the affects proposals may have on the demand for additional development in London Borough of Haringey should be considered carefully.

Accommodating Future Growth

15.5 The sequential approach suggests that town and District Centre should be the first choice for retail development, which is supported by policies within the London Plan. In Haringey the preferred location for retail development needs to be carefully considered, particularly for major development which may have an extensive catchment area. Major development should be located within the Metropolitan and District Centres, as suggested in the London Plan.

15.6 Some forms of retail facilities which serve more localised catchment areas may be more appropriate within local centres, rather than the main centres. However, all development should be appropriate in terms of scale and nature to the centre in which it is located.

15.7 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.

15.8 There are 190 vacant units identified within town and local centres, a vacancy rate of 8.0%, this is compared to a GOAD national average vacancy rate of about 11%. If half of the vacant premises (95 units) were re-occupied this could also help to accommodate growth. Based on an average size of a unit of about 100 sq m gross, these reoccupied units could accommodate about 9,500 sq m gross. The strategy should seek to reduce the vacancy rate across the Borough.

15.9 It may be reasonable to assume about half of these vacant units could be occupied by comparison retail floorspace (4,750 sq m gross), and about 2,000 sq m gross occupied by convenience retail floorspace, with the remainder (2,750 sq m gross) occupied by non-retail services (including Class A2 to A5).

15.10 Growth in sales densities and vacant shops will not be able to accommodate all the future growth, therefore, potential development sites need to be identified through the Local Development Framework process to accommodate longer term growth.

Convenience Goods Development

15.11 On the basis of the assumption that existing convenience retailers trade at national average turnover levels, the quantitative capacity analysis indicates there is significant potential for further convenience goods floorspace within the Borough, as shown in Table 15.1.

Table 15.1: Convenience Expenditure/Floorspace Projections

	2008 to 2011	2008 to 2016	2008 to 2021
Surplus Expenditure £M	£65.53	£87.01	£98.35
Projected Sales Floorspace SQ M Net			
Large Stores (over 200 sq m net)	5,196	6,796	7,568
Small stores/shops (up to 200 sq net)	2,598	3,398	3,784

15.12 There is significant capacity to improve convenience sales floorspace in the Borough in the short to medium term (i.e. up to 2016), taking into account the impact of food store proposals in neighbouring Borough (i.e. Asda at Edmonton Green). These projections do not take into account the commitments at the GLS Supplies Depot on Ferry Lane and The Mall extension at Wood Green, which may include approx. 1,200 sq m net of Class A1 convenience retail floorspace. This floorspace would need to be deducted from the floorspace projections above.

15.13 Vacant shop premises within the main and local centres and commitments (Table 3A, Appendix A) could make a contribution towards meeting this floorspace projection (say about 3,500 sq m gross), in particular small shop units within district and local centres.

15.14 Nevertheless the large store projection (6,796 sq m net by 2016) may be difficult to accommodate in the Borough. In our view it may not be necessary to meet the entire food store projection, because it may be reasonable to expect food stores in Haringey to trade above national average densities, due to higher customer expenditure and overhead. However, the potential to accommodate larger food stores suitable for main and bulk food shopping (over 1,000 sq m net) should also be considered, in order to relieve high trading levels in existing large food stores.

15.15 There may also be potential to improve large food store provision within the Borough if suitable opportunities emerge. If proposals for food stores emerge then the impact of these stores on designated centres would need to be carefully considered, regardless of the global retail capacity identified in this study.

Comparison Goods Development

15.16 The strategy should seek to promote further comparison retail development within Wood Green Metropolitan Centre, as the main comparison shopping destinations in the Borough. The strategy should seek to maintain and enhance the Metropolitan and District Centres and their current position in the shopping hierarchy and, and as a minimum seek to maintain the centre's existing market share of expenditure. In order to maintain or enhance Wood Green's existing position it will be necessary to continue to improve comparison shopping facilities in the longer term. Comparison retail development within other smaller centres in the Borough should be consistent in terms of scale and nature with the nearest centre and should not serve a Borough wide catchment area. The potential for further comparison goods floorspace within the Borough is shown in Table 15.2. These projections do not take into account the commitments at the GLS Supplies Depot on Ferry Lane and The Mall extension at Wood Green, which may include approx. 10,850 sq m gross of Class A1 comparison goods floorspace. This floorspace would need to be deducted from the floorspace projections below.

Table 15.2: Comparison Expenditure/Floorspace Projections

	2008 to 2011	2008 to 2016	2008 to 2021
Surplus Expenditure £M	43.69	108.05	208.98
Projected Sales Floorspace SQ M Net	**8,058**	**18,500**	**33,212**
Wood Green/Green Lanes (inc. Arena Retail Pk)	4,441	10,123	18,226
Muswell Hill/Crouch End	1,304	3,131	5,571
Bruce Grove/Tottenham High Road/West Green Road/Seven Sisters/Tottenham Hale Retail Park	1,944	4,374	7,854
Other/Local Shops	369	871	1,560
Projected Gross Floorspace SQ M	**10,744**	**24,666**	**44,282**
Wood Green/Green Lanes (inc. Arena Retail Pk)	5,921	13,498	24,301
Muswell Hill/Crouch End	1,739	4,175	7,428
Bruce Grove/Tottenham High Road/West Green Road/Seven Sisters/Tottenham Hale Retail Park	2,592	5,832	10,472
Other/Local Shops	492	1,162	2,080

15.17 The quantitative capacity analysis indicates that in the short to medium term up to 2016 there could be scope for about 13,500 sq m gross of comparison floorspace in Wood Green/Green Lanes and this could increase to 24,300 sq m gross by 2021. In other centres across the Borough there could be scope for a further 11,200 sq m gross of comparison floorspace by 2016, increasing to 20,000 sq m gross by 2021.

15.18 If emerging retail development proposals within centres exceed these floorspace projections, or the proposal is expected to be implemented before the forecast year, this does not necessarily imply that planning permission should be refused. However, careful consideration will be required relating to whether the development is of an appropriate scale (in relation to the relevant centre) and whether the potential impact of the development both within the centre and on other centre will be acceptable.

15.19 The Council should seek to identify sites within the designated centres to meet at least the floorspace projections up to 2016, in the south of the Borough. In the Central part of the Borough (Wood Green/Green Lanes) the Council will need to take a longer term view, and should consider how the longer term projections after 2016 may be accommodated. Potential development sites need to be examined further as currently proposed in the LDF process. Sites identified in the LDF should continue to be explored with the landowner/developers, recognising it may take a number of years to complete complex developments.

15.20 Any major comparison retail proposals outside the designated centres (town, neighbourhood and village) will be required to demonstrate there is a need for the development proposed, comply with the sequential approach to site selection, and the applicant will also need to demonstrate the proposal will not have an unacceptable impact on existing centres. Development within centres will also need to be consistent in terms of scale and nature to the role of that centre and the catchment area the centre serves.

The Designation and Role of Centres in the Borough

15.21 PPS6 indicates that local planning authorities should adopt a positive and proactive approach to planning for the future of the centres within their areas, whether planning for growth, consolidation or decline. Local planning authorities are expected to set out a vision and strategy for the pattern and hierarchy of centres, including local centres, within their area. This strategy should set out how the role of different centres will contribute to the overall vision for their area.

15.22 The sequential approach indicates that town, district and local centres are the preferred location for the 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/leisure 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.

15.23 PPS6 suggests that local authorities should adopt policies that enable town, district and local centres to meet the needs of residents in their area. The sequential approach indicates that the first preference for new developments should be within centres followed by edge-of-centre locations. Out of centre sites are last in the order of preference. Edge of centre sites for shopping purposes are generally 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 surrounding by predominately residential areas, and retail development within edge-of-centre areas may be undesirable or unviable.

15.24 The distinction between town, district and local centres is important when applying the sequential approach and determining the appropriate scale of development within each centre. The nature, role and location of proposed retail/leisure schemes need to 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.

15.25 The current UDP identifies 44 centres. The Plan identifies 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.

15.26 Below these main centres the Local Plan 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.

15.27 For the most part, the UDP designation for the main centres in the Borough is consistent with the London Plan, albeit the centres have different names i.e. Bruce Grove/Tottenham High Road is *'Tottenham'* and West Green Road/Seven Sisters is *'West Green Road'*.

15.28 Annex A of PPS6 provides guidance on the definition of centres and some clarification on the designation and role of centres. Table 1 of PPS6 describes the characteristics of different centres. It suggests that 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 after city 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.

15.29 PPS6 also suggests that *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, although some may have developed specialist shopping functions. There is a wide variation in the scale and nature of the 156 district centres designated in the London Plan.

15.30 It appears the London Plan definition of district centres goes beyond that suggested by the description in Table 1 of PPS6, in terms of the scale and range of facilities available. Therefore some local centres in London may be similar in size and function to district centres designated outside London.

15.31 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.

15.32 Below district centres, PPS6 does not provide sub-divisions for local centres. However, the footnotes indicate that small parades of shops of purely neighbourhood significance are not regarded as centres for purposes of the policy statement. PPS6 states that local centres include a range of small shops of a local nature, serving a small catchment. Typically, local centres might include, amongst other shops, a small supermarket, a newsagent, a sub-post office and a pharmacy. Other facilities could include a hot-food takeaway and launderette.

15.33 In our view none of the local centres should be reclassified as district centres, based on the current scale of commercial floorspace.

15.34 The London Plan describes *neighbourhood centres* as providing services for local communities, but provides limited guidance on what may be considered to be appropriate within neighbourhood centres.

15.35 PPS6 makes a distinction between local centres and smaller parades, but does not give definitive guidance on how local authorities should categorise local centres/shopping parades within their areas. However, PPS6 suggests that the designation of local centres (i.e. anything below district centres) should be defined by local authorities based on local circumstances. Therefore there is no set methodology or approach that can be applied from elsewhere. Based on our experience many local authorities have two tiers of local centre, and usually very small parades or individual local shops are not identified as centres

15.36 An analysis of local centres and parades is set out in Section 13 of this report. Local centres could be split into two tiers 'Large Local Centres' and 'Small Local Centres'. Large Local Centres will generally have between 20 and 100 commercial units and will include a convenience store and a good range of retail and service uses. Small Local Centres will generally have less than 20 commercial units and be of purely local significance. Very small clusters of local shops and freestanding shops should not be designated as local centres.

15.37 Table 15.3 over leaf identifies a possible classification of 'Large Local Centres' and 'Small Local Centres'.

Table 15.3: Local Centre Designations

Large Local Centres	No. of Units
Archway Road	104
Turnpike Lane	87
Hornsey High Street	73
Lordship Lane Roundway	70
Myddleton Road	64
Tottenham Lane East	39
Seven Sisters Road	32
Highgate High Street	31
Lordship Lane West	29
West Green Road West	29
Great Cambridge	28
Tottenham High Road North	28
Park Road/Priory Road	26
Crescent Road	25
West Green Road Central	25
Alexandra Park Road	24
Bounds Green	22
Broad Lane	21
Philip Lane West	20
Small Local Centres	
Westbury Avenue	19
Park Lane	19
Philip Lane East	18
Tottenham Lane West	15
Aylmer Parade	14
Stroud Green Road North	14
Lordship Lane East	13
Lordship Lane Central	13
Stroud Green Road South	13
Ferme Park Road	12
Weston Park	11
Wood Green High Road North	11
Quernmore Road	10
Commerce Road	9
Green Lanes	9
Cranley Parade	5
Craven Park Road	5
Midhurst Parade	5
Hermitage Road	4

Future Strategy Implementation and Monitoring

15.38 There are a number of broad areas of possible action the Council could pursue in order to maintain the role of shopping centres within the Borough, in face of increasing competition, and to address the weaknesses highlighted in this report, as follows:

- application of guidance within PPS6, particularly relating to need and the sequential approach in determining out-of-centre retail and other development proposals that generate significant numbers of trips;
- improving the range and choice of shops and services in all centres (where appropriate in terms of scale) by encouraging intensification, development and the re-occupation of vacant premises, and continuing to promote the centres;
- maintaining and enhancing environment within each centre;
- measures to maintain high levels of accessibility and public transport to the centre;
- the continued implementation of shop frontage policies within the development plan to protect retail and other desirable town centre uses; and
- measures to bring forward development opportunities to improve the availability of modern premises suitable for new occupiers within designated centres.

15.39 The recommendations and projections within this study are expected to assist the Council in preparing development plan policies over the coming years and to assist development control decisions during this period. The study provides a broad overview of the potential need for further retail and leisure development up to 2016, with longer term forecast up to 2021. However, projections are subject to uncertainty and forecasts may need to be amended to reflect emerging changes as and when new information becomes available. In particular long-term projections beyond 2016 should be treated with caution.

15.40 Therefore, we would recommend that this retail capacity study should be updated in 4-5 years time and the floorspace projections rolled forward. The following key assumptions should be updated as necessary:

- population projections;
- local expenditure estimates (information from Experian or other recognised data providers);
- growth rate assumptions for expenditure per capita (information from Experian or other recognised data providers);
- the impact of potential increases in home and internet shopping;
- existing retail floorspace and average turnover to floorspace densities (floorspace surveys and turnover data); and
- implemented and impact of development within and around the study area.

15.41 These key inputs into the retail capacity assessment can be amended to provide revised capacity projections. We do not envisage that the structure of the capacity assessment set out in this report will need to be amended. It may be necessary to undertake an updated household survey to address the implementation of major developments that will significantly alter shopping patterns in the Borough.

15.42 The Council should consider monitoring and updating the centre health checks provided in this study on a regular basis, perhaps 2-3 years in order to assess changes in the vitality and viability of the centres. In particular changes in the land use and vacancy rates should be monitored. Property market data should also be monitored i.e. rents and yields.

Appendix A

Study Area and Existing Retail Facilities