Hearing 3, Thursday, 30th June 2011

Further Statement from the Council regarding the evidence that existing centres have the capacity to accommodate new retail development?

1.1 Haringey's Retail and Town Centre Study provides a borough wide needs assessment for retail in the borough. It provides a shopping needs of the borough up to 2011, 2016 and 2021. The spatial distribution of retail growth set out in SP10 is for the first five years of the life of the Core Strategy, up to 2016.

Comparison Goods Development

1.2 The quantitative capacity analysis set out in the Retail and Town Centres Study 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 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, as set out in the table below.

Projected Gross Floorspace SQ M	2008 – 2011	2008 – 2016	2008 – 2021
Wood Green/Green Lanes (inc Arena Retail Park)	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
Total	**10,744**	**24,667**	**44,281**

Convenience Good Development

1.3 The quantitative capacity analysis indicates there is significant potential for further convenience goods floorspace within the borough, as shown below.

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

1.4 Vacant shop premises within the main and local centres could make a contribution towards meeting this floorspace projection (about 3,500

sq m gross), in particular small shop units within district and local centres.

1.5 The Retail and Town Centres 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. The Council recognise that long term projections beyond 2016 should be treated with caution. As such, it has been recommended that the retail study is updated in 4-5 years time and the floorspace projections rolled forward. This is the Council's intention, so to ensure a spatial distribution of retail is carried forward up to 2026 for the life of the Core Strategy.

Accommodating future growth

1.6 Major retail development should be located within the Metropolitan and District Centres, as suggested in the London Plan.

1.7 Some form 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.

1.8 The existing stock of premises may have a role to play in accommodating projected growth. The retail capacity analysis 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.

1.9 There are 190 vacant units identified within town and local centres, a vacancy rate of 8%, 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.

1.6 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 A2 to A5).

1.10 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 LDF process to accommodate

longer term growth. The Council's emerging Site Allocations DPD will seek to identify these potential development sites.

1.11 The amount of additional floorspace for town centre uses in 2009/10 was **1,650 sq m**. For the monitoring year 2008/09, an additional **7,066 sq m** of retail floorspace was developed, totalling 8,716 sq m.

The potential impact of the growth in home shopping

1.12 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. 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 expenditure that might otherwise be spent in shops. Growth in online sales may not always mean there is a reduction in the need for retail floorspace because if the growth is achieved it may (to a large extent) be at the expense of other forms of shopping such as catalogues and mail order shopping.

1.13 This form of trading has been excluded from the quantitative capacity analysis within the Retail Study because this expenditure does not affect the need for retail floorspace. The 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. This issue can be addressed in the next Retail Capacity Study so to support future policies if necessary.

The Night-Time Economy

1.14 Although the Retail and Town Centre Study did not assess the quantitative capacity of night time economy growth in the borough's town centres, the Study did recognise that the presence of evening economy throughout Wood Green is very good, especially the secondary area of Hollywood Green, where there is a cinema and several bars and restaurants.

1.15 The reference to encouraging a range of complementary evening and night-time uses in SP10 is consistent with the advice of policy EC4 of PPS4 and London Plan policy 3D.4 and its draft replacement policy 4.6.

1.16 Whilst SP10 of the Core Strategy sets out the intention to foster a diverse evening and night time economy, how this will be measured and delivered will be in subsequent LDF documents. To inform the DM DPD an evidence based approach to managing the night time economy through an integrated range of measures including planning, licensing, policing, transport and street cleaning will be required. This integration of measures will be essential to manage unacceptable

cumulative impacts and saturation of night time economy activities in one particular area.