

High Road West, Tottenham Retail Assessment

DP9

March 2015

Prepared by

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Quality Standards Control

The signatories below verify that this document has been prepared in accordance with our quality control requirements. These procedures do not affect the content and views expressed by the originator.

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DATE
27 March 2015

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Limitations

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1 INTRODUCTION

- 1.1 GLH have undertaken a preliminary impact assessment of a potential commercially viable concept for a new planned centre at High Road West (HRW). The development concept tested has had regard to the recent Masterplan prepared for the area – particularly in respect of spatial planning.
- 1.2 GL Hearn has sought to test alternative retail concepts for the Masterplan area having regard to the survey undertaken in the Retail and Town Centres Study (2013) prepared for the Council as well as the prevailing (and planned) retail hierarchy. In particular we have sought to consider the potential future relationship with the Centres of Wood Green, Bruce Grove, Seven Sisters Road and Tottenham Hale.
- 1.3 The Retail and Town Centres Study provides the retail evidence base for emerging policy and non-policy documents and plans. The Study provides some fairly conservative estimates of future retailing growth and suggests no change to the existing retailing hierarchy.
- 1.4 The High Road Masterplan (prepared by JLL / Arup) within the Tottenham Physical development Framework has been prepared for HRW. It envisages an urban renewal designed to integrate with and respond to the planned new football stadium, creating an opportunity for a new mixed development, potentially comprising a new library, enterprise centre, new homes, with some retail and leisure uses lining a new public open space that provides the linkage between the revamped White Hart Lane station and the new stadium.
- 1.5 The Council is currently preparing its Tottenham Area Action Plan (AAP) (Preferred Options at this time) and are seeking input from a robust and objective evidence base to help define the scale and form of development that would be appropriate to plan for.
- 1.6 As part of the consultation on the partial review of the Haringey Local Plan Strategic Policies, HRW has been removed from the list of 'locally significant industrial sites'. The emerging planning policy states that the Council will encourage growth in North Tottenham (which includes Northumberland Park, The football stadium, and HRW). There is however limited retail anticipated by policy at this time.
- 1.7 This report seeks to understand whether an alternative approach towards retailing floorspace within HRW wider regeneration could be supportable by LB Haringey through a revision to the AAP.
- 1.8 This report considers the commercial rationale for the concept outlined, which itself is the derivative of the scale and mass of development required to leverage off the adjoining THFC stadium and Sainsbury's foodstore development. In essence, the concept is becoming self-fulfilling for the HRW location.

Report Structure

1.9 In summary, this report covers:

- Section 2 provides a review of relevant planning policy documents and other material considerations in respect of informing a retail development concept at High Street West
- Section 3 sets out the development concept that is the subject of assessment in this report. This includes a commentary around the commercial viability of the concept
- Section 4 assesses the qualitative and quantitative effects of the development concept
- Section 5 considers the approach towards the sequential test for any future planning application.
- Section 6 sets out the report's conclusions.

2 PLANNING POLICY & OTHER MATERIAL CONSIDERATIONS

2.1 The following sets out the relevant background to the retail hierarchy and the potential form and nature of a designated 'Centre' at Tottenham High Road West.

NPPF

2.2 The NPPF (para 23) states that "*Planning policies should be positive, promote competitive town centre environments and set out policies for the management and growth of centres over the plan period.*"

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

- Define the extent of town centres and primary shopping areas;
- Promote competitive town centres that provide customer choice and a diverse retail offer and which reflect the individuality of town centres;
- Allocate a range of suitable sites to meet the scale and type of retail, leisure, commercial, office, tourism, cultural, community and residential development needed in town centres. It is important that needs for retail, leisure, office and other main town centre uses are met in full and are not compromised by limited site availability.

2.4 Currently national planning policy guidance provides relatively little advice around the typical content of centres below the Town Centre tier. District, Neighbourhood and Local Centres have previously been defined but this no longer appears in planning guidance at a national level.

2.5 The London Plan Town Centres SPG offers some steer around the roles of smaller centres. Ultimately, however the NPPF expects local planning authorities to plan for the needs of their centres through the development plan process. A centre's offer and catchment will differ greatly and the inter-relationships between centres are complex and dynamic.

Planning Practice Guidance (2015)

2.6 Town centres area defined as an area defined on the local authority's proposal map, including the primary shopping area and areas predominantly occupied by main town centre uses within or adjacent to the primary shopping area. In the Guidance references to town centres or centres apply to city centres, town centres, district centres and local centres but exclude small parades of shops of purely neighbourhood significance.

2.7 The guidance encourages a "*positive vision or strategy for town centres, articulated through the Local Plan, is key to ensuring successful town centres*". Any strategy should be based on "opportunities to meet development needs". Strategies should address the following:

- what is the appropriate and realistic role, function and hierarchy of town centres in the area over the plan period?
- what is the vision for the future of each town centre?

- can the town centre accommodate the scale of assessed need for main town centre uses?
- in what timeframe should new retail floorspace be provided?

2.8 Finally, the PPG encourages such strategies should identify changes in the hierarchy of town centres, including where a town centre is in decline. In these cases, strategies should seek to manage decline positively to encourage economic activity and achieve an appropriate mix of uses commensurate with a realistic future for that town centre.

London Plan (March 2015)

- 2.9 The London Plan (FALP) identifies five broad types of town centre within London: International, Metropolitan, Major, District, Neighbourhood/Local centres.
- 2.10 The London Plan suggests District Centres traditionally provide convenience goods and services for more local communities and are accessible by public transport, walking and cycling. Typically they contain 10,000–50,000 sqm of retail floorspace, although some may have developed specialist shopping functions.
- 2.11 The London Plan provides the following centre classifications:
- Major centres – typically found in inner and some parts of outer London with a borough-wide catchment. They generally contain over 50,000 sqm of retail, leisure and service floorspace with a relatively high proportion of comparison goods relative to convenience goods. They may also have significant employment, leisure, service and civic functions.
 - District centres – providing convenience goods and services for more local communities and accessible by public transport, walking and cycling. Typically they contain 10,000–50,000 sqm of retail, leisure and service floorspace. Some District centres have developed specialist shopping functions.
 - Neighbourhood and more local centres – typically serve a localised catchment often most accessible by walking and cycling and include local parades and small clusters of shops, mostly for convenience goods and other services. They may include a small supermarket (typically up to around 500 sqm), sub-post office, pharmacy, laundrette and other useful local services.
- 2.12 There is scope for Boroughs to bring forward visions and strategies for town centres to reconfigure and diversify them recognising:
- the particular roles District, neighbourhood and more local centres to accommodate local needs for convenience retailing and essential local services (policy 4.8Bb)
 - the potential for centres to adapt and evolve to becoming thriving community hubs accommodating a diverse range of uses including leisure, culture, tourism, night time economy, employment and housing alongside traditional retailing, civic functions, community services and social infrastructure (policy 2.15Cc)
 - the specialist roles of some centres, for example in niche retailing, street markets, arts, culture, tourism, entertainment and the night time economy (policy 2.15Cc, paragraph 2.73 and policies 4.5–4.8)
 - the need for a co-ordinated approach to redevelopment to accommodate economic and housing growth through intensification (policy 2.15Cb) and for responsive local policies to manage change in primary shopping areas and primary and secondary frontages (policy 2.15Da).

- 2.13 All of the relevant identified Centres for this Study are identified as being in need of regeneration. Each of these three are identified for “*Medium growth – includes town centres with moderate levels of demand for retail, leisure or office floorspace and with physical and public transport capacity to accommodate it*”:
- Wood Green (Metropolitan) NT3 / Medium R
 - Bruce Grove/ Tottenham High Road (District) Medium R
 - West Green Road/ Seven Sisters (District*) Medium R

London Plan Town Centres SPG (July 2014)

- 2.14 The SPG provides some further guidance on centre types and their related opportunities. It notes that Town centres of different scales will be affected differently by these challenges and opportunities. For example the larger, attractive centres including the stronger Metropolitan and Major centres are those mostly likely to be able to attract continued investment in comparison and convenience goods retail.
- 2.15 At the other end of the scale, the neighbourhood and more local centres should continue to play to their strengths in providing local convenience and essential services to their local resident population.
- 2.16 The centres in the middle tier, including some of the weaker Major centres and many District centres will face the greatest challenges, finding it difficult to attract significant new retail investment and facing the threat of some retailers moving out and rising levels of vacancy.

Haringey’s Local Plan: Strategic Policies (March 2013)

- 2.17 The hierarchy of shopping centres in the borough is defined in the Plan 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
- 2.18 Tottenham High Road North is recognised as a Local Shopping Centre.
- 2.19 Policy SP10 states, “*the Council will promote the distribution of retail growth to meet the required additional 13,800 sqm gross comparison goods floorspace ad an additional 10,194 sqm net*”

convenience goods floorspace by 2016. The majority of the retail growth is to be met in Wood Green Metropolitan Centre and the five District Centres."

- 2.20 Wood Green is to be the 'principal focus of growth' to create a thriving and vibrant centre for North London. The Wood Green Town Centre SPD (October 2008) states that the vision for Wood Green is to create a "...vibrant, dynamic, cosmopolitan and commercially successful Metropolitan town centre".
- 2.21 The five District Centres will continue to be supported and strengthened as important shopping and service centres 'to meet people's day-to-day needs'. Further it states that "*The Council will take a proactive partnership approach to reinvigorating these town centres, widening their role and offer.*"
- 2.22 For the local shopping centres such as Tottenham High Road, these "*...will continue to be supported in providing core local shopping facilities and services...for their respective local communities*".
- 2.23 The designation of Tottenham Hale as a new District Centre is based upon "*...the existing scale, role and function and mixed use development which is currently taking place*".
- 2.24 Notably, Policy SP10 recognises that the Metropolitan Town Centre and District Town Centres, "*...are influenced by major shopping destinations in north and central London and compete with a number of centres in neighbouring boroughs including Brent Cross, Walthamstow and Edmonton Green in Enfield.*" (Paragraph 5.3.5).

[A Plan for Tottenham \(LBH, September 2012\)](#)

- 2.25 This document includes the ambition of:
- "Redefine Tottenham into a series of distinct, yet complementary, places that draw on their own strengths and competitive advantages. Places like Northumberland Park, Tottenham Green, Seven Sisters and Tottenham Hale will become destinations in their own right with much more focused retail and leisure offers."*
- 2.26 A five point plan for change through to 2025 includes:
1. Transform Northumberland Park into north London's premier leisure destination with new high quality housing and improved transport options
 2. Create a fun, civic heart at Tottenham Green and turn Seven Sisters into an impressive gateway into Tottenham

3. Promote Tottenham Hale as a new centre for growth, exploiting excellent transport connections
 4. Consolidate and revitalise the retail experience on the High Road
 5. Improve the quality of life for everyone – encourage investment, jobs, economic growth, quality housing and strong neighbourhoods”
- 2.27 **Tottenham Hale** - The document considers that the retail park “revamp” and recognition as a new town centre would occur between 2017-2025.
- 2.28 **Tottenham Green and Seven Sisters** - will be a gateway to Tottenham and the High Road – a gateway that is well designed, well used and well cared for. The comprehensive redevelopment of Wards Corner will bring 40,000 sq ft of much improved retail space, including space for the re-provision of the Seven Sisters market.
- 2.29 **Bruce Grove** - The High Road is at the heart of business and community life in Tottenham. It will ... flourish as a retail destination, focusing its retail and leisure offer in key locations. The High Road will become home to more brand names, high quality independents and leisure providers. A revitalised High Road will have fewer retail units. Lower quality outlets will be replaced by high quality businesses that make a positive contribution to the local area. This regeneration is envisaged to occur between 2017-2025.
- 2.30 **The High Road** – high quality mix of retail and leisure uses will be encouraged along with intensification of sites where they enhance the historic High Road setting. A High Road Improvement Plan to revitalise the whole of the High Road and create identifiable and distinctive retailing and leisure centres at Bruce Grove, Seven Sisters and North Tottenham will support this.

[Tottenham Physical Development Framework \(Arup, 2012\)](#)

- 2.31 The Framework recognises a “thriving High Road with three very different centres at Seven Sisters, Bruce Grove and High Road West that create a diverse commercial, cultural and retail offer”. It comments on several of the Centres relevant to this Assessment as follows:

High Road West

- Agree and implement a master plan for High Road West
- Improve retail experience in terms of quality of the streetscape environment and diversity of the offer
- Making High Road West a destination through the provision of leisure uses
- The new Sainsbury’s development provides an opportunity to enhance the retail offer and improve connectivity to the High Road
- Delivery of the approved schemes for Tottenham Hotspur FC and the Brook House site to kick start the regeneration and ‘book end’ the regeneration proposals for the area

- Delivery of improvements to White Hart Lane Station, ... plans for a new station square
- A new large public space (Station Square) linking White Hart Lane to the High Road.

Tottenham Hale

- a destination where people can [enjoy] a range of retail, leisure and business opportunities.
- creation of a new town centre and major transport gateway with a vibrant mix of commercial, retail, residential and leisure uses set within an attractive network of public streets and spaces.”
- an increase in the proportion of ... retail, and associated food and beverage uses in the area
- Enhancing and expanding the retail offer to support the emerging town centre through a range of initiatives including encouraging both national chains and high-quality local independent traders
- Development of a night-time economy and daytime cafe culture to support both the residential and business communities

Tottenham Green and Seven Sisters

- enhancing the distinctive retail offer along West Green Road
- “encourage a specialist retail destination at West Green Road

Bruce Grove

- strengthen the retail offer through development of retail accommodation that is attractive to multiple retailers
- concentrate the retail offer in the key centres on the High Road
- diversification beyond retail will be encouraged on the fringes of the prime retail frontage; for example, with restaurants, cafes, workspaces and local businesses

Tottenham Strategic Regeneration Framework (March 2014)

2.32 The vision set out in this document expresses the need to “attract ‘anchor’ retail and service sector businesses to key regeneration areas and major development schemes”, and “revitalise the High Road to become a great destination with a choice of shops, both independent and brand name stores, vibrant markets, and places to eat, drink and socialise”.

2.33 In respect of each of the relevant centres for this Assessment it states:

Tottenham Hale

- London’s next great new neighbourhood, Tottenham Hale will be a destination ... enjoying a range of retail, leisure and business opportunities.
- will feel like a new town centre with an attractive network of streets and public spaces.

Bruce Grove

- a beautiful and historic high street at the heart of Tottenham’s business and community life
- targeted retail management strategy will enhance the quality and image of existing businesses and encourage new cafes, restaurants and shops.

- Creative interventions at Bruce Grove station and Holcombe Market will establish retail and market landmarks in Tottenham's town centre.

High Road West

- Deliver the High Road West regeneration scheme – creating a new residential neighbourhood, major leisure destination and hundreds of new jobs.

Tottenham Area Action Plan (Preferred Option) (LBH, February 2015)

- 2.34 The Tottenham Area Action Plan will be “a blueprint for the comprehensive and co-ordinated regeneration of Tottenham and the local neighbourhoods within it”. It is in an early stage of preparation and therefore the Council are seeking commentary on its content.
- 2.35 The AAP seeks to realise the significant potential for urban renewal and intensification, particularly within Seven Sisters, Tottenham Green, Tottenham Hale and Northumberland Park. The AAP provides for major new housing development (10,000 new homes), substantial employment growth (5,000 new jobs) through (amongst other sources) “a mixed leisure development, as part of a hub incorporating the new Tottenham Hotspur FC stadium, enhancing North Tottenham's distinct offer as a leisure destination and providing a catalyst for wider High Street and estate renewal”.
- 2.36 The High Road West (NT3) site specific policy encourages:
- 2.37 *“Masterplanned comprehensive development creating residential led mixed use neighbourhood including a new public realm linking White Hart Lane Station and a redeveloped football stadium and an expanded local shopping centre on the High Road opposite the football stadium including the new public square”.*
- 2.38 As part of this vision, the following are anticipated within the centre:
- New retail provision to enlarge the existing shopping parade, creating a new local centre opposite the new stadium, including the new public square. This should complement not compete with Bruce Grove District Centre.
 - Enhance the area as a destination through the creation of new leisure, sports and cultural uses and provide seven day a week activity.
 - Increase the quality and quantity of community facilities and social infrastructure - such as a new library, learning and education hub.

High Road West Masterplan Framework (Arup et al, September 2014)

- 2.39 The Masterplan provides detailed guidance for the area as part of a Masterplan Framework. Within this it provides guidance around land uses, parking and massing etc. The document will be used to inform the Tottenham AAP. The Masterplan has had regard to (amongst other documents) the Retail Strategy for Tottenham (JLL and Arup, October 2013). Moselle Square and the High Road

Character Areas are particularly relevant to this Report. The Masterplan encourages new retail and mixed use development on White Hart Land and the High Street, and it is noted that the community has encouraged broader retail offer on the High Street including larger retailers in the High Road West area. In particular the Land Use proposals on pages 110 and 111 have informed the development concept identified in the net section (though the retail concept is revisited).

Retail and Town Centres Study (April 2013)

2.40 In respect of the Designation and Role of Centres in the Borough the report concludes:

- Bruce Grove/Tottenham High Road, and West Green Road/Seven Sisters roles are in line with the London Plan's description for district centres.
- We consider that if the emerging plans for the wider opportunity area come forward, the location of the existing centres within the east of the borough would not be able to fully serve the opportunity area
- Tottenham Hale Retail Park could be allocated as a District Centre in terms of the current scale of floorspace, however, there would need to be an intensification of uses on the Park to broaden the range and type of retailers and services. This would need to include smaller units for nonretail/ community services.
- none of the local centres should be reclassified as district centres, based on the current scale of commercial floorspace. This conclusion was based on the current scale of centres, not in relation to need or opportunities for development.

Summary

2.41 The relevant development plan does not anticipate any change to the designation of Tottenham High Road as a Local Centre. Many of the supporting documents and material considerations do however place great emphasis on the importance of the High Road as a whole and the defined centres which focus activity along it. The evidence also suggests that the scale of regeneration anticipated in the east of the Borough could bring significant new residential population and related retailing expenditure.

2.42 The prevailing retailing and town centres strategy suggests that a new District Centre and revitalised Seven Sisters and Bruce Grove District Centres would support this. Since many of these documents have been prepared, the Stadium development at White Hart Lane has gained further momentum, and potentially places even greater emphasis around this north east part of the Borough.

3 RETAIL & LEISURE DEVELOPMENT CONCEPT

3.1 This section considers the potential for Tottenham High Road Local Centre to grow through a planned retail and leisure proposal set within the context of:

- The shops and services of the existing Local Centre;
- The proposed new football stadium and recent large foodstore; and
- The regeneration ambitions for jobs and homes at High Road West.

3.2 In planning terms, it considers the potential for the scale of planned retail and leisure growth to be recognised as a future designated District Centre.

3.3 National Policy no longer provides a definition of District or Local Centres. The London Plan recognises that District centres provide convenience goods and services for local communities and are accessible by public transport, walking and cycling. Typically they contain 10,000–50,000 sq m of retail, leisure and service floorspace. Furthermore it recognises that some District centres have developed specialist shopping functions.

3.4 CACI define 'Purpose Built District Centres' as "essentially smaller regional malls serving a more localised area. They are located in areas serving several towns or districts. The retail offer is more limited than a regional mall". CACI have further distinguished between different types of Purpose Built District Centre through designating some as 'Average' and others as 'Value'. The most relevant definition is:

- Average Purpose Built District Centres - these centres make up the majority of District Centres, offering major retailers for a mass localised market. A number of these centres also contain a large supermarket.

Defining the Retail & Leisure Concept

3.5 It should be noted that a number of 'town centre uses' presently exist in the North Tottenham High Road Local Centre. These, including the large Sainsbury's foodstore, should be taken into account when considering the ultimate form and scale of Centre.

3.6 It is anticipated that the retail and leisure offer would serve the following:

- Local residents (existing and new)
- Local businesses' needs
- Local institutional needs such as health and education
- Passing tourism (including football related trade)
- Planned businesses and residential areas within the area
- Some "passing trade" inward expenditure

3.7 Based around the Tottenham Masterplan Framework, we have made the following assumptions on the physical concept for an enlarged town centre as far as is necessary at this time:

- It would relate well to the existing Sainsbury's store to ensure that joint shopping trips are convenient and the foodstore 'feels' part of the centre
- It would be largely delivered within Phase 1 land as defined by the Masterplan
- It would be well related to the railway station and the bus routes along the High Street to maximise accessibility (PTAL is 4 presently)
- It would be well related to the Square and the new east west connection between the Station and High Street
- It would be well related to the proposed Tottenham Hotspur football stadium
- significant new off street car parking spaces would be required from a commercial perspective
- The identified development blocks from the Masterplan diagram (below) would accommodate other uses such as retail at upper levels if appropriate.

3.8 The gross site (as identified in the August 2014 Masterplan framework – p111) includes four development blocks and are referred to in this report as follows:

- A small block to the south west of park adjacent to railway station
- B square block to the south of park (and adjacent to Block A)
- C south east of park adjacent to High Road / stadium (and adjacent to Block B)
- D north of park adjacent to railway station

3.9 For the purpose of this report, the development blocks identified within the masterplan framework have been used to provide a spatial form to the retail concept. However, it is likely that the final form of development will need to respond to market demands and place-making objectives. The retail concept is based around the following masterplan blocks.

3.10 The anticipated total retail and leisure floorspace is 300,000 sq ft (27,870 sqm) and is set out as follows:

Block A

- 10,000 sq ft (929 sqm) gross Convenience foodstore

Block B

- 100,000 sq ft (9,290 sqm) of comparison goods retailing (specialist destination / sporting retailers)
- 40,000 sq ft (3,716 sqm) cinema and/or bowling alley (over ground / first floors)

Block C

- 50,000 sq ft (4,645 sqm) of comparison goods retailing (typical 'high street' retailers)
- 30,000 sq ft (2,787 sqm) of restaurants/café space

Block D

- 50,000 sq ft (4,645 sqm) of comparison goods retailing (typical 'high street' retailers)
- 30,000 sq ft (2,787 sqm) of restaurants/café space

Commercial Commentary

- 3.11 Essentially we consider that the development concept requires a clear policy support in the AAP to encourage the market to deliver such large scale mixed use development. The concept considered and assessed has had the benefit of a degree of commercial testing.
- 3.12 Having considered the commerciality of this scheme we firmly believe that such a proposal would be acceptable in the commercial market place. The principal reason behind this is that we have considered the commercial concepts and attempted to attach names to the option, whilst considering the neighbouring centres of Wood Green, Tottenham Hale, Seven Sisters, and Bruce Grove. Generally the massing and usage as proposed would complement the existing centres. The blocks as proposed would be in our opinion suitable for the following.
- 3.13 Convenience retail in Block A, such as a M&S Simply Food store of approximately 11,000 sq ft as is their standard requirement. Blocks B & C for commercial retail use that complements the THFC stadium and we believe leisure/sports retailing uses would complement the area completely. We are aware that Decathlon do not have any stores in the vicinity and that Sports Direct are changing their retailing concept to incorporate a retail and leisure offer of units of 60 / 90,000 sq ft. An alternative or complementary retailer would be a destination lifestyle retailer such as Next of approximately 70,000 sq ft., and / or M&S for a destination store of approximately 60,000 – 100,000 sq ft, and possibly John Lewis for a John Lewis Home store of approximately 50,000 sq ft We believe that any of these concepts would sit comfortably in the proposed development, as the appropriate scale and massing could be provided to create a destination that leverages off the adjoining THFC Stadium and the Sainsbury's foodstore.
- 3.14 At this stage we have not market-tested the demand for the concepts, but have provided indicative names for the type of development envisaged. We do consider that the types of operators mentioned would be in addition to their current representation in the Borough / any proposed representations in the Borough that we are aware of.
- 3.15 In the event that a transaction is progressed with M&S it should be noted that the convenience retail element would be incorporated in to the store to provide a comprehensive M&S offer as opposed to them trading two separate stores. This would require further thought about actual massing on site at the appropriate time.
- 3.16 In addition we envisage a leisure/F&B mass to complement the above and the adjoining Stadium. This would incorporate a cinema and substantial A3 and A4 operators. A leisure-based option in our commercial opinion would have demand as the operators such as Cineworld and Vue are represented in Wood Green, and (out of the borough) Empire in Walthamstow, and Cineworld &

Odeon to the north in Enfield & Picketts Lock respectively. Serving the immediate catchment are Cineworld and Vue in Wood Green but to the south there is very little representation and accordingly we believe the likes of Odeon and Vue may consider the development.

- 3.17 To capitalise on the retail/leisure offers and the stadium development we believe that a reasonable amount of A3 / restaurant / café space would complement the proposed development. The concepts such as Wagamamas, Pizza Express, Nando's, Frankie & Benny's, Los Iguanas, Prezzo etc. would readily serve the proposed catchment and in addition to them complementary offers would increase the square footage to approximately 60,000 sq ft to create a real destination of scale and mass.

4 RETAIL ASSESSMENT

- 4.1 We have been commissioned to undertake impact modelling analysis for the allocation of a retail/leisure development within High Road West between White Hart Lane railway station and the planned new football stadium at White Hart Lane.
- 4.2 We have analysed the results of the household telephone survey that served as the evidence base for the Council's own Retail Study (Retail and Town Centres Study, NLP 2013), which is up-to-date and wholly suitable for the purposes of sensitivity testing.
- 4.3 We have updated all data inputs (expenditure growth rates, SFT assumptions, and floorspace efficiency) to match the most recent Experian publication to ensure accurate and up-to-date modelling, and we have applied the GLA Ward-level, SHLAA-based population projects to ensure accurate and robust calculations of available expenditure levels going forward.
- 4.4 We have tested the impact of a mixed use scheme comprising the following elements:
- Comparison Floorspace 200,000 sq ft (18,580 sqm)
 - Convenience Floorspace 10,000 sq ft (929 sqm)
 - Leisure Floorspace 100,000 sq ft (9,290 sqm)

Comparison Retailing

- 4.5 The results of the household telephone survey provide empirical evidence from which we can study the pattern of expenditure in the survey area. This tells us what market share of available expenditure each destination has in every survey zone. By analysing this market-share information we can chart the influence that existing centres have in each zone and show where they draw the bulk of their turnover from. This allows us to deduce the trade-draw pattern of retail destinations from individual zones.
- 4.6 Responses to the comparison shopping questions in the household telephone survey results help build a detailed picture of the profile, role and function of individual centres. We have looked specifically at the following retail destinations:
- Wood Green
 - West Green Road / Seven Sisters
 - Bruce Grove / Tottenham High Road
 - Tottenham Hale Retail Park
 - Crouch End
 - Green Lanes
 - Muswell Hill

4.7 The Map at Appendix 1 to this report sets out the spatial distribution of these retail destinations in relation to the proposed allocation site and in the context of the survey area.

Shopping & Spend Pattern Analysis

4.8 The market share analysis set out in Tables 5-12 of Appendix 2 to this report reveals that Wood Green is clearly the dominant comparison shopping destination in the Borough with a 16% market share of total available comparison expenditure in the survey area.

4.9 Tottenham Hale Retail Park is the second most popular comparison shopping destination with an 8% market share, followed closely by Muswell Hill and Crouch End which respectively enjoy market shares from the survey area as a whole of 5.3% and 3.3%. Green Lanes has a 1.3% market share while Bruce Grove/Tottenham High Road and West Green Road/Seven Sisters have very low market shares of 0.8% and 0.6% respectively.

4.10 More detailed analysis of comparison spend by zone and sub-category reveals the key strengths of each retail destination (describing their role and function) and enables us to establish the pattern in which each centre draws its trade.

4.11 We have analysed the role, function and trading profile of these relevant centres in order to allow us to assess the likely overlap in retail offer and consequent trade diversion and impact estimates.

Wood Green

4.12 Wood Green is the dominant centre in the borough and enjoys considerable levels of market share from across the survey area, particularly Zones 1, 7 and 8. Penetration rates in Zones 2 and 4 are lower however.

4.13 Wood green is particularly strong in the following sub-categories:

- Clothing & footwear (25.1% market share)
- Chemist, health and beauty items (17.7% market share)
- Other such as books, CD's, toys & gifts etc. (25.6% market share)

4.14 The centre has a very low market share for the following categories:

- Furniture, soft furnishings and floor coverings (5.9% market share)
- DIY / hardware and garden items (3.9% market share)

4.15 Wood Green draws most of its trade from Zones 1 and 7 (22% and 21% respectively), and also draws heavily from zones 5, 6 and 8 (13%, 15% and 17% respectively).

4.16 Wood Green clearly fulfils the role of the dominant shopping destination in the borough for typical high street comparison goods (fashion and luxury items), although it is weaker in the

bulky/DIY/electronics sectors. Vitality and viability levels are high. The centre appears to be trading very healthily. See Table 5 in Appendix 2 for a complete breakdown of market shares, turnover and trade draw patterns.

4.17 The Council's Retail Study noted the following key considerations in respect of centre health:

- Retail yields are relatively low (i.e. strong) in Wood Green, and have fallen from 7% to 5.75% since July 2004.
- Retail rents have also increased steadily.
- Wood Green is the most popular location for comparison shopping overall across the Study Area.
- The centre "fulfils a strategic shopping role providing both convenience and high and low order comparison retailers. The centre also has a significant leisure and entertainment offering serving the borough and beyond."
- The proportion of vacant units is significantly below the national average.
- There is a very good representation of major multiple comparison retailers.
- Centre is in reasonable health but let down by cleanliness and a lack of maintenance.

West Green Road / Seven Sisters

4.18 With a total comparison goods turnover of £8.65 million from the survey area representing a market share of just 0.6%, West Green Road/Seven Sisters is the least popular of the seven retail destinations we have analysed.

4.19 This centre's turnover mainly relates to clothing & footwear, electronics and some DIY and Chemist goods.

4.20 West Green Road / Seven Sisters draws most of its trade from Zones 7 and 6 and has some very small levels of turnover from Zones 1, 2, 3 and 8. Vitality levels are high and the centre is busy with pedestrian activity. See Table 6 at Appendix 2 for a complete breakdown of market shares, turnover and trade draw patterns.

4.21 The Council's Retail Study noted the following key considerations in respect of centre health:

- The range of retailers and mix of uses highlight that this centre serves a day-to-day function.
- There is some observational evidence that turnover rates among businesses are relatively high.
- The range of lower order, independent retailers is good.
- Vacancy rates are comparable with the national average, and do not indicate any substantial problems with the viability or market demand for retail properties in the area.
- There is some clustering of vacancies along West Green Road.
- Overall perceptions of the District Centre appear to have declined since 2008.

Bruce Grove / Tottenham High Road

4.22 Bruce Grove / Tottenham High Road has a very similar performance level to West Green Road / Seven Sisters, with a comparison turnover of £10.62 million from the survey area amounting to a

market share of just 0.8%. However Bruce Grove has slightly higher penetration rates in its core catchment (Zones 7 and 8 at 3.2% and 3.0% respectively), and lower market shares from the rest of the survey area; meaning that this centre's catchment area is more tightly drawn, a fact that is reflected in Bruce Grove's trade draw pattern – 91% of the centre's comparison turnover is drawn from its core Zones 7 and 8.

- 4.23 Bruce Grove's turnover is mainly reliant on chemist, health and beauty items, and to a lesser extent electronic goods, furniture, soft furnishings and floor-coverings.
- 4.24 Like Seven Sisters, this centre has weak penetration rates, even in its immediate catchment; it predominantly caters to the incidental shopping needs of a tightly drawn catchment and operates at the budget/value end of the market. Vitality levels are reasonably high with much pedestrian activity. See Table 7 at Appendix 2 for a complete breakdown of market shares, turnover and trade draw patterns.
- 4.25 The Council's Retail Study noted the following key considerations in respect of centre health:
- The range of retailers and mix of uses highlight that this centre serves a day-to-day function.
 - There is some observational evidence that turnover rates among businesses are relatively high.
 - The range of lower order, independent retailers is good.
 - Vacancy rates are comparable with the national average, and do not indicate any substantial problems with the viability or market demand for retail properties in the area.
 - There is some clustering of cleared/derelict sites along Tottenham High Road, near Bruce Grove.
 - Overall perceptions of the District Centre appear to have improved since 2008.
 - Riots of 2011 do not appear to have left a visible legacy or appreciably impacted upon the perceived health and viability.

Tottenham Hale Retail Park

- 4.26 Tottenham Hale Retail Park has a considerable turnover of £109.7 million from the survey area amounting to a market share of 8% making the retail park the second most popular comparison shopping destination in the borough after Wood Green.
- 4.27 Tottenham Hale has good penetration rates from across the survey area, from as high as 23% in Zone 7, approximately 9.4% in Zones 6 and 8. Its market share is lowest in Zone 2 at just 1.4%.
- 4.28 Tottenham Hale Retail Park caters mainly to the following shopping needs:
- Domestic appliances (20.9% market share)
 - Electrical, TV, Hi-Fi & computers (22.4% market share)
 - DIY/hardware and garden items (17.2% market share)
- 4.29 Indeed Tottenham Hale Retail Park is the most popular destination in the borough for such sub-categories of goods, thus defining its role and function.

- 4.30 35% of its trade is drawn from Zone 7, 19% from Zone 6 dropping to 13% from Zone 8. This retail park has a wide catchment area. The retail park appears to be trading strongly. See Table 8 in Appendix 2 for a complete breakdown of market shares, turnover and trade draw patterns.
- 4.31 The Council's Retail Study noted the following key considerations in respect of retail mix and centre health:
- 25 retail/service units. Purpose-built retail park. Predominantly serving bulky goods operators.
 - No independents/specialist retailers. Limited provision of clothing and footwear.
 - Mostly accommodates electrical and other durable goods, telephone and accessories.
 - Only services are restaurants, cafes takeaways.
 - Destination in reasonable health.

Crouch End

- 4.32 Crouch End has a comparison turnover of £45.1 million from the survey area amounting to a market share of 3.3%. Its comparison retail offer appears to be geared towards chemist, health and beauty items, as well as other non-food items such as books, CDs, toys and gifts.
- 4.33 The centre draws most of its trade (70%) from Zone 3, its core catchment, with some trade being drawn from Zones 6 (£8.65 million) and Zone 1 (£2.62 million). This shows that Crouch end has a wider catchment area than Bruce Grove and Seven Sisters, and higher penetration rates in the zones that compose its catchment.
- 4.34 Crouch End caters to week-to-week shopping needs of a wide catchment, serving the mid to quality/high end of the market (relative to the borough as a whole). Vitality levels are high and the centre has numerous quality independent retailers indicating a high degree of viability. See Table 9 of Appendix 2 for a complete breakdown of market shares, turnover and trade draw patterns.
- 4.35 In respect of centre health, the Council's Retail Study noted the following key considerations:
- The quality of specialist independent traders is good.
 - The quality of multiple retailers in the primary area is good, with established high street retailers such as Boots, Carphone Warehouse and Oliver Bonas present.
 - The attractiveness of commercial properties is good.
 - Shops fascias could benefit from improved maintenance.
 - Vacancy levels compare well with the national average.
 - Overall the primary shopping area is considered reasonable to good.

Green Lanes

- 4.36 Green Lanes has a comparison turnover of £17.96 million from the survey area amounting to a market share of 1.3%. It has its highest penetration rate in Zone 6 from which it draws £10.56 million or 59% of its turnover.

- 4.37 The centre's comparison retail offer is quite mixed and diverse although orientated slightly more towards chemist, health and beauty items, and to a lesser extent clothing and footwear, small electricals and soft furnishings and floorcoverings.
- 4.38 Green Lanes caters to specialist ethnic retail needs, pitched at the budget/value to mid-market with few major multiple retailers. Vitality levels are high and the centre appears to be trading well. See Table 10 of Appendix 2 for a complete breakdown of market shares, turnover and trade draw patterns.
- 4.39 In respect of centre health, the Council's Retail Study noted the following key considerations:
- The centre has a good number of local convenience shops and service retailers.
 - The centre has a limited selection of comparison shops.
 - The quality of the streetscape is of a poor standard.
 - The number of vacancies compared to the national average is reasonably good.
 - Overall the primary shopping area is considered reasonable.

Muswell Hill

- 4.40 Muswell Hill has a comparison turnover of £72.23 million amounting to a market share of 5.3%. Its penetration rate is highest in Zone 2 (24.7%), dropping to 7.2% in Zone 4 and 6.9% in Zone 1.
- 4.41 The centre's retail offer is geared towards the following sub-categories of comparison goods:
- Chemist, health and beauty items (11.7% market share from the survey area as a whole and high penetration rates in this sub-category from Zones 1, 2, 3, 4 and 5).
 - Other non-food items (books, CDs, toys and gifts etc.) (13.5% market share)
 - Furniture, soft furnishings and floor-coverings (3.9% market share)
 - Clothing and footwear (3.1% market share / £13.29 million)
- 4.42 Muswell Hill seems accommodate many high quality independent retailers and caters a wider range of comparison shopping needs serving the mid to quality end of the market. The centre appears to be vital and viable, and trading healthily. See Table 11 at Appendix 2 for a complete breakdown of market shares, turnover and trade draw patterns.
- 4.43 In respect of centre health, the Council's Retail Study noted the following key considerations:
- The quality of specialist independent retailers is very good
 - Traders provide a wide range of goods and services
 - The quality of national multiple retailers is very good.
 - The presence of the evening economy was rated as good.
 - Very little evidence on on-street drinking or begging.
 - Cleanliness and maintenance appeared mixed.
 - The attractiveness of commercial properties is very good.

- The number of vacancies compares very favourably with the national average.
- Overall the primary shopping area is considered good.

Comparison Retail Impact Analysis

Proposed Floorspace and Anticipated Turnover

- 4.44 We have modelled the impact of 200,000 sq ft of comparison floorspace. This amounts to 18,580 sqm (gross), which will translate to 13,006 sqm of net comparison floorspace assuming a net floorspace factor of 70%. To this figure we have added the comparison element that we would expect to be delivered as part of the local convenience store (208 sqm net). We anticipate that the combined comparison floorspace would achieve a turnover of £73.64 million by 2020, rising to £81.30 million by 2025 (see Table 17 of Appendix 2 for as full breakdown of projected comparison turnover).

Retail Mix and Scheme Turnover by Sub-Category

- 4.45 We have assumed that the comparison floorspace will be taken up by a large format destination retailers with an emphasis on sporting goods shop to complement the Stadium development.
- 4.46 In terms of mix and massing we are envisaging the following:
- Sporting Goods – 40 / 90,000 sq ft
 - Comparison Block – 70,000 sq ft
 - Comparison Block – 50,000 sq ft
- 4.47 In terms of the comparison blocks as previously identified we envisage these to be destination retailers such as Next for one of the “Lifestyle” stores, John Lewis at Home, and possibly M&S. All these retailers would look to sell a mix or comparison goods. At this stage we have not demand-tested the concepts and mention the retailers as purely indicative as to the type of operator who might consider the concepts proposed to complement any retail offer they currently have / or proposed in the Borough.
- 4.48 Considering this specific retail mix, we would anticipate that the compassion turnover over of the overall scheme would be predominantly weighted more heavily in favour of ‘clothing and footwear’, with the balance evenly split between domestic appliances & electrical, soft furnishings and other (books/toys/gifts etc). We would not expect the scheme to accommodate chemist, health, beauty or DIY goods. This trading mix assumption has a direct bearing on our trade diversion calculations and accordingly we expect the scheme to divert trade more heavily from existing centres that have higher market shares for these sub-categories of goods (see Table 18 of Appendix 2).

Trade Draw Pattern

- 4.49 We have based the anticipated trade draw pattern of the scheme on the existing trade draw pattern of the Tottenham Hail Retail Park as revealed in the results of the household telephone survey(although drawing more from Zone 8 than 7). Like Tottenham Hale, we would expect the scheme to draw the bulk of its trade predominantly from Zones 3, 6, 7 and 8 and the remainder from a wide catchment. The Council's retail study has assumed a 10% inflow figure for Tottenham Hale. We consider that it would be reasonable to assume that the proposed scheme would achieve a slightly higher inflow rate of 15% due to the fact that the scheme will benefit from incidental trade off the back of the new football stadium (which will draw trips from far beyond the survey area), and also by virtue of the ability of a 'destination' profile of a major operator, such as the Decathlon, to draw trade from a wide area.
- 4.50 Table 19 at Appendix 2 sets out the breakdown of our anticipated trade draw pattern. Tables 20 and 21 show the trade draw (in monetary terms) by 2020 and 2025, and is a product of tables 18 and 19.

Trade-Diversion and Scheme Impact

- 4.51 Having established the likely trade-draw from each survey zone, we then apply the figures to the combined comparison market shares of all other retail destination. Existing market shares for each destination by sub-category (as recorded by the telephone survey) are weighted in accordance with our expected retail mix to accurately show the proportion at which the proposed scheme is expected divert trade from each retail destination on a zone-by-zone basis. This allows us to calculate total expected trade-draw from each zone and total trade-diversion from each retail destination.
- 4.52 These trade-diversion figures produce impact figures by representing the diversion figure as a percentage of the expected total store turnover at the assessment year (2020) in a no-scheme scenario.
- 4.53 This methodology naturally accords with the impact modelling principle that 'like affects like' as it takes into consideration proximity and trading profile-overlap. It uses the results of the household telephone survey to directly produce anticipated trade-draw levels and trade-diversion figures, avoiding the use of trade-draw assumptions and adjustments. It uses primary evidence to produce objective results from a robust model that should be considered reliable.
- 4.54 Impact figures on relevant centres are set out below. A judgment as to whether the likely adverse impacts are 'significant' can only be reached in the light of local circumstance i.e. the health and trading performance of relevant centres.

Wood Green

- 4.55 Our calculations predict that the heaviest trade diversion (in monetary terms) will come from Wood Green. The proposed scheme will divert £15.3 million from Wood Green in 2020 amounting to a comparison impact of 4.7%. Wood Green's residual comparison turnover (post impact) in 2020 would be £311.7 million, which is 14% above its current turnover. Wood Green is currently trading healthily, and the volume of forecast expenditure growth is expected to significantly boost its performance in the coming years. Our analysis shows that the anticipated trade diversion can be comfortably accommodated leaving sufficient available expenditure by 2020 to improve comparison sales densities of existing floorspace by a considerable degree.
- 4.56 Impacts are cushioned over time as more expenditure becomes available. By 2025, the impact on Wood Green will drop to 4.2% while the residual turnover will increase to £384.8 million, which is 41% above existing performance levels in 2015. In this context we would not consider this impact on Wood Green to be 'significantly adverse'. In fact, given the scale of expenditure growth forecast, and the anticipated growth in turnover of the town centre the trade diversion from Wood Green will barely be perceptible by the time the development reaches a settled pattern of trading.

West Green Road / Seven Sisters

- 4.57 West Green Road / Seven Sisters will experience an impact level of 3.1%, although this pertains to only a small level of trade diversion (£0.4 million). This seemingly perverse situation whereby a small degree of trade diversion amounts to a 3.1% impact flows from the fact that this centre has a low comparison turnover figure. We do not expect there to be much overlap in trading profile between West Green Road and the Moselle Square scheme, hence the low trade diversion figure. This impact level is still tolerable, and is not considered significant when we take into consideration the fact that projected expenditure growth will swell the trading performance of the District Centre's comparison floorspace by 17% by 2020 (after trade diversion to the proposed scheme has been taken into account), and by 44% by 2025.

Bruce Grove / Tottenham High Road

- 4.58 Bruce Grove is relatively close to the proposed allocation site, but we expect trade diversion to be lowest from this centre due to the trading profile overlap. Our model predicts £0.5 million will be diverted from Bruce Grove by 2020, amounting to a comparison impact on 3.2%. Forecast expenditure growth will improve this centre's trading performance by 18% by 2020 (post impact), rising to a 46% increase in sales density by 2025, (compared with 2015 levels). Such a small level of impact will be insignificant in light of such performance and expenditure growth.

Tottenham Hale Retail Park

4.59 Tottenham Hale Retail Park is primarily oriented towards electronics/domestic appliances/electricals/hardware sectors with bulky goods occupiers, and the degree of trading overlap with the proposed scheme is only partial but given the proximity to the proposed allocation site and the broad overlap in catchments, we anticipate that £4.4 million will be diverted to the proposed scheme. This amounts to an impact of 3%, which will be more than offset by the retail park's anticipated performance growth over the assessment period (17% above existing levels by 2020, after trade diversion has been factored in – rising to 44% above existing by 2025). Strong forecast expenditure growth in the area is expected to significantly improve turnover levels in Tottenham Hale which will make up for the anticipated trade diversion within less than a year. Such impact levels are not considered significantly adverse in the light of this local circumstance, and will be practically imperceptible to the trading performance of the retail park.

Other

4.60 Trade diversions from Crouch End, Green Lanes and Muswell Hill will be low at £1.2 million, £0.6 million and £1.1 million respectively, amounting to impacts of between 1.3% and 2.1%. These impact rates are considered negligible, particularly in the context of forecast expenditure growth over 5 and 10 year periods, and the consequent improvement for each centre's turnover that is anticipated.

4.61 The attractiveness of the development scheme's differentiated offer will boost the profile of this part of the borough and draw more people into Haringey as well as encouraging trade retention of the existing catchment's expenditure. The knock-on effects for other surrounding retail destinations will be positive as the complementary retail and leisure offer will positively reinforce the development potential at Tottenham Hale and Bruce Grove.

Comparison Impact Conclusions

4.62 See tables 22 and 23 of Appendix B for a full account of trade diversion and impact for each of the relevant centres.

4.63 Long term expenditure growth has the ability to palliate impact levels, and the combination of population and spend growth in the survey area will deliver an additional £263.3 million by 2020 (this represents 19.3% growth) rising to a total uplift (over a 10 year period) of £626.2 million by 2025 (growth of 45.9%).

4.64 The comparison turnover of relevant centres we have modelled is expected to rise between 17% and 22% over the next five years, and by between 41% and 51% by 2025. This is a significant volume of expenditure growth which has the ability to support new retail floorspace. The residual

performance factors that we have identified in the last column of tables 22 and 23 of Appendix 2 show that there will be sufficient expenditure growth to support proposed development at other centres, even after trade diversion to the proposed scheme is taken into account.

- 4.65 The inter-relationship of the new football stadium with the proposed retail/leisure scheme at High Road West will improve the attractiveness of this part of the borough generally, and will naturally lead to more trade retention. The results of the Council's telephone survey reveal that Haringey currently has a trade retention rate of 36.8%. Our calculations show that the proposed scheme will increase trade retention to 29.2% (approximately £40.2 million) which will have consequent spin-off benefits for local shops and services by way of linked trips and incidental trade.
- 4.66 The potential for this increased trade retention is made possible by addressing a demonstrable need for improved retail facilities, at a well-connected location with a bold place-making, comprehensive mixed-use development. It would be much harder for an established area like Bruce Grove to fulfil this function without comprehensive reconfiguration of the existing centre. Even if such drastic intervention in an established centre could be accommodated and delivered in a suitable timeframe, Bruce Grove would still not be in a position to capitalise on the widely drawn catchment of the football stadium to solidify the wider appeal that is necessary to make an impression on the profile of the borough.

Convenience Retail Impact Analysis

- 4.67 The convenience floorspace element of the proposed allocation measures approximately 650 sqm net which is likely to compose 442 sqm of net convenience floorspace and 208 sqm of comparison floorspace. This is a very small quantum of convenience floorspace that would amount to a local convenience type offer for top-up shopping, providing the day-to-day needs of the local community. It would also serve the incidental convenience shopping needs of visitors to the area, and not amount to a destination in its own right.
- 4.68 This quantum of floorspace is far below the threshold in the NPPF that requires an impact assessment to be undertaken, and such a small quantum of floorspace is not expected to alter the patterns of expenditure to any noticeable degree. Notwithstanding these considerations, we have run an impact assessment for the convenience element which shows that 442 sqm of net convenience floorspace is likely to exert a convenience turnover of £4.65 million by 2020, incurring the following impacts on relevant retail destinations:
- Wood Green – 0.5%
 - Seven Sisters Road – 0.5%
 - Bruce Grove – 1.1%
 - Tottenham Hale Retail Park – 0.5%

4.69 These impact levels are negligible and should not be considered significantly adverse. See Table 14 of Appendix 3 for a full breakdown of anticipated trade diversion and impact.

4.70 We have mapped the spatial distribution of foodstores in the wider area (see Appendix 4).

Leisure Impact Analysis

4.71 There is no established quantitative methodology for assessing leisure need or impact, and it is practical for the impact of leisure proposals to be assessed on a qualitative basis. We have assessed the spatial distribution of existing cinemas as part of a standard gap analysis, and the subject site would appear to plug a noticeable gap in provision (see the map at Appendix 5).

4.72 The proposed F&B (restaurant/café use) leisure/service use, is unlikely to amount to a destination in itself, and would rely for its viability on the proximity to the new football stadium, the cinema and the wider comparison retail provision, as it would benefit from the associated opportunities for pass-by trade. This factor will translate to a high degree of inflow due to the fact that the new football will draw footfall from much further field than the survey area. This means that a larger proportion of the F&B turnover would be drawn from beyond the survey area, which will reduce the opportunity for impacting on neighbouring centres.

4.73 When considering the adjoining centres the proposed uses do not directly compete due to the lack of such branded uses in these centres. In considering both Seven Sisters and Bruce Grove, both have a distinct lack of branded F&B offers, and as such we do not foresee the proposed use competing with these centres but rather complement them, in offering an F&B use that would be considered mainstream rather than local.

4.74 Tottenham Hale is slightly different in so much as there is currently a limited F&B offer. However, the centre lacks a sufficient scale of an F&B offer, accordingly we do not foresee the proposed use competing with this centre but rather complementing it.

4.75 With regard to Wood Green this centre has a diverse F&B offer and as such there would be some impact but we suspect the additional scale of the F&B at Tottenham High Road West would allow the offer to complement that of Wood Green. For example of branded F&B - there is a Nando's in Wood Green but we anticipate that in a comprehensive development at High Road West Tottenham, not only Nando's would seek representation but others as well such as Wagamamas, Pizza Express, Frankie & Benny's, Prezzo, Zizzi, Jimmy's etc.

4.76 In considering cinema representation the only noticeable cinemas in the immediate catchment locations are the Vue (6 screen) and Cineworld (12 screen) in Wood Green. Outside the borough are the Empire (9 screen) in Walthamstow, Cineworld (15 screen) in Enfield, and the Odeon (12

screen) in Picketts Lock. These would draw trade from the borough but this leakage could be prevented by the location of a mainstream cinema on the site. We anticipate that the mainstream operators would consider the site, although it is very difficult to second guess the acquisition strategies of the mainstream operators at present. There is less acquisition taking place, nationally, than there was two or three years ago.

4.77 We do not consider the location suitable for the more “boutique” or independent cinema operators such as Picture House, Curzon or Everyman as the immediate demographic profile does not much their requirements.

4.78 In addition the wider survey area needs to be considered as the area in to provide a destination and as such from a demand aspect areas outside the borough need to be considered to establish if the proposed use is commercial viable. Whilst some centres such as Walthamstow, Enfield, and Picketts Lock offer limited food & beverage to complement cinemas we feel these would not impact on the scale and mass of the proposed development; which in turn could be seen to complement the existing neighbouring centres in borough that we have discussed above.

Comparable Stadia Led Development

4.79 It is very difficult to draw comparison to other inner city Stadia led development that is comparable to the envisaged development. The scheme proposed would in some respects be unique.

4.80 However three stadia led development examples that we can provide that show an indication of scale and mass adjoining a stadium would be as follows:

- *London Designer Outlet Centre Wembley*

This scheme is situated immediately adjoining Wembley Stadium, in close proximity to Wembley Park underground station, and Wembley Stadium rail station. It is part of the landowner’s Quintain’s 85 acre regeneration project of Wembley Park. The scheme comprises circa 70 outlet shops, 20 restaurants and a cinema.

- *Middlebrook Bolton*

This scheme is situated adjacent to the Reebok Stadium, home to Bolton Wanderers Football Club. This is an out of centre development and is the largest retail and leisure destination in the UK, comprising 464,500 sq ft of retail units, a cinema, a bowling alley, bars and restaurants. It is anchored by a Vue Cinema, Asda Foodstore, Marks & Spencer and Homebase.

- *Morfa Shopping Park, Swansea*

This scheme is situated adjacent to the Liberty Stadium, home to Swansea City FC and the Ospreys RFC. It is an out of centre development situated circa 1.5 miles to the north east of

Swansea city centre. The park benefits from excellent road communications, being situated approximately 5 miles from the M4. The scheme comprises circa 339,000 sq ft and is anchored by a Morrisons foodstore, a B&Q Warehouse, and retailers such as Next and Boots.

5 SEQUENTIAL ASSESSMENT

- 5.1 The sequential approach identifies that town centres are the preferred location for main town centre uses including retail and leisure development.
- 5.2 The NPPF states that Local planning authorities should apply a sequential test to planning applications for main town centre uses that are not in an existing centre and are not in accordance with an up-to-date Local Plan. They should require applications for main town centre uses to be located in town centres, then in edge of centre locations and only if suitable sites are not available should out of centre sites be considered. When considering edge of centre and out of centre proposals, preference should be given to accessible sites that are well connected to the town centre. Applicants and local planning authorities should demonstrate flexibility on issues such as format and scale.
- 5.3 Edge of centre sites for shopping purposes are well connected sites within 300 metres of the primary shopping area. In practical terms a 400 metre distance from the main shopping centres within the London Borough of Haringey would cover a large part of the borough. Most of the main centres are surrounded by predominately residential areas, and retail development within edge-of-centre areas may be undesirable or unviable.
- 5.4 Some forms of development may be more appropriate in smaller centres, if there are localised areas of deficiency. The key issues are the nature and scale of retail development proposed and the catchment area the development seeks to serve. Development should normally be consistent in terms of scale and nature with the character and role of the nearest centre.
- 5.5 Local Planning Authorities are expected to meet identified needs in full, and the Council's Retail Study has identified significant comparison floorspace need across Haringey (14,362 sqm by 2022, growing to 35,000 sqm by 2031). This Retail Study forecasts are conservative as they were calculated in a recessionary period when future expenditure growth was underestimated compared with the most up-to-date growth forecasts.
- 5.6 The proposed new football stadium will be a significant generator of footfall, and will create a locational need for complementary commercial facilities. The proposed retail and leisure scheme is intended to serve the dominant function of the stadium and it follows that such development must fall within close proximity of the stadium. The potential allocation site lies between the stadium and the railway station, and as such is the only site in close proximity to the stadium that is accessible and well connected to public transport linkages.

6 CONCLUSIONS

- 6.1 This Report has considered the prospect of the existing Local Centre and High Road Tottenham to become something more significant as part of the envisaged High Road West regeneration proposals. This appraisal has had regard to the prevailing development plan policy and other material considerations such as the latest 2014 Masterplan. This work is intended to inform the emerging Tottenham AAP.
- 6.2 The assessment has tested a retail and leisure development concept which has regard to the prevailing economic and retail property market conditions. Many aspects of the concept (particularly the leisure elements) broadly accord with the expectations of the Masterplan. It is not anticipated that the greater level of retailing would necessarily undermine the ability to deliver other uses at upper floors (for example residential). It should also be noted that potential retailing effects on other centres may be lessened as the concept could be delivered in two distinct phases.
- 6.3 The relevant development plan does not anticipate any change to the designation of Tottenham High Road as a Local Centre. Many of the supporting documents and material considerations do however place great emphasis on the importance of the High Road as a whole and the centres which focus activity along it. The evidence also suggests that the scale of regeneration anticipated in the east of the Borough could bring significant new residential population and related retailing expenditure.
- 6.4 The prevailing retailing and town centres strategy suggests that a new District Centre and revitalised Seven Sisters and Bruce Grove District Centres would support this. Since many of these documents have been prepared the Stadium development at White Hart Lane has gained further momentum and potentially places even greater emphasis around this north east part of the Borough.
- 6.5 The proposed convenience floorspace would serve the day-to-day, top-up shopping needs, and is of such a small scale as the quantitative impact on existing facilities and centres would be negligible.
- 6.6 The proposed 13,214 sqm of comparison floorspace would be provided in a large specialist sporting goods store (to complement the attractiveness and profile of the new football stadium), and a range of high street operators (major multiple retailers). The impact of this scheme is expected to fall most heavily on Wood Green, with an anticipated comparison impact of 4.7%. However this is not considered significantly adverse as Wood Green's trading performance is considered sufficiently robust to withstanding the level of trade diversion, particularly in light of the strong increase in turnover that is forecast. Expenditure growth over the next five years will push Wood Green's turnover up by 20%, which is more than enough to make up for the anticipated levels of trade diversion.

- 6.7 The proposed leisure use would comprise a cinema (for which there is a geographic gap) and a range of F&B. We do not consider this proposed F&B to compete with relevant centres due to the lack of such branded uses in these centres. In considering both Seven Sisters and Bruce Grove centres, both have a distinct lack of branded F&B offers, and as such we do not foresee the proposed use compete with these centres but will instead complement them, in offering a F&B use that could be described as mainstream rather than local.
- 6.8 The combination of uses will provide the critical mass necessary to adequately serve the dominant function of the new football stadium, as well as differentiating the offer from anything else available in this part of the borough.
- 6.9 From a commercial aspect we believe the location of High Road West would provide an ideal location to develop a comprehensive 300,000 sq ft retail and leisure scheme, which would leverage off the adjoining Tottenham Hotspur stadium and the Sainsbury developments.
- 6.10 We envisage that any scheme would comprise destination retail offers that have a sports / leisure biased and together with those that are lifestyle in concept. The types of retailers we believe who might consider the proposals are the likes of; Sports Direct, Decathlon, Next, John Lewis At Home, and M&S.
- 6.11 With regard to the leisure aspects of the concepts we believe there may well be demand from a mainstream cinema operator such as Vue or Odeon. This usage and the adjoining retail would be complemented by a substantial F&B offer where the likes of Pizza Express, Nando's, Wagamamas, Prezzo etc would leverage off the stadium and above outlined uses.
- 6.12 On the basis of the above, we consider that the emerging Tottenham AAP should be more aspirational in its thinking for this defined Centre. The development concept tested suggests that significantly more retail and leisure floorspace could be located in this location without generating significant retailing effects on other centres or the currently planned hierarchy. It may therefore be prudent that the local planning authority considers Tottenham High Road to potentially become a new District Centre within the development plan.