

Enfield Retail and Leisure Study Updated Needs Assessment

London Borough of Enfield

1 December 2021

LICHFIELDS

Glossary

Benchmark turnover

Expected turnover of existing retail floorspace based on national averages which the identified available expenditure can be measured against.

Class A1

Commercial units/premises previously classed as retail or shop uses in the old Use Classes Order (UCO), which are now class E in the new UCO (post September 2020).

Class A2

Commercial units/premises previously classed as financial or professional services, for example banks and building societies within the old UCO, which are now class E in the new UCO.

Class A3

Commercial units/premises previously classed as restaurants and café food outlets in the old UCO, which are now class E in the new UCO.

Class A4

Commercial units/premises previously classed as public houses or bars in the old UCO, which are now Sui Generis (unclassified) in the new UCO.

Class A5

Commercial units previously classed fast as food or takeaway food outlets selling cooked hot food within the old UCO, which are now Sui Generis (unclassified) in the new UCO.

Class E

Units/premises currently classed as commercial, business and services in the new UCO), including shops, restaurants/café, financial/professional services, indoor sports/fitness, medical health facilities, creche/nurseries and office/business uses.

Convenience goods

Consumer goods purchased on a regular basis such as food/groceries and cleaning materials.

Comparison goods

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

Experian

A data consultancy widely used for retail planning information.

Food and Beverage

Previous uses classes A3, A4 and A5 food and drink outlets, selling consumed away from the home or hot food takeaway food but not food and grocery items including in convenience goods.

GlobalData

A market research and data consultancy widely used for retail planning information, previously Verdict Research.

Goad Plans

Town centre plans prepared by Experian, which are based on occupier surveys of over 1,300 town centres across the UK.

Gross floorspace

Total external floorspace including exterior walls.

Market share/Penetration rate

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

Multi-channel shopping

Products made available to consumers on more than one sales channel, such as ecommerce websites, brick-and-mortar stores, marketplaces, comparison shopping engines, social media platforms, and other online channels.

Multiplex cinema

A cinema complex with five or more screens.

Net (sales) floorspace

Retail floorspace devoted to the sale of goods, excluding backstage/storage space and other areas not accessible to customers.

Oxford Retail Consultants (ORC)

A data consultancy widely used for retail planning information.

Special forms of trading

Retail sales via the internet, mail order, stalls and markets, door-to-door and telephone sales, including on-line sales by supermarkets, department stores and catalogue companies.

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1.0

Introduction

1.1

Lichfields was commissioned by the London Borough of Enfield to prepare the Enfield Retail and Town Centres Study published in November 2014 (ERTCS 2014). The ERTCS 2014 was partially updated in 2018 (the 2018 update). The objectives of ERTCS 2014 and 2018 update were to:

- 1 assess changes in circumstances and shopping and leisure patterns since previous retail studies were undertaken, including the effects of the recession and the availability of Census data;
- 2 assess the future need and (residual) capacity for retail, town centre office, commercial leisure and entertainment/cultural floorspace in the Borough for the period up to 2029 and then rolled forward to 2035;
- 3 assess the potential implications of emerging developments both within and outside the Borough;
- 4 review the existing retail hierarchy and network of centres and advise whether any changes were required;
- 5 review the existing extent of the town centres and primary shopping areas and advise on any changes required to accommodate retail floorspace, and any alterations required to policies protecting shopping frontages;
- 6 provide advice on policies to be included in development plan documents to address future needs and provide recommendations on how each centre can develop its role.

1.2

This 2020 update report has been commissioned to explore the implications of recent changes including the potential implications of the Covid-19 pandemic and changes to the Use Classes Order. It provides a further update of the ERTCS 2014 and should be read alongside the previous 2014 report. This report updates and rolls forward the Borough wide retail capacity projections and need assessment to 2040, including:

- 1 an update of population projections based on the Greater London Authority's (GLA) latest housing led ward based projections;
- 2 adoption of Experian's local expenditure data (the latest 2018 base year data have been obtained) for the 7 study area zones.
- 3 adoption of Experian's latest (October 2020) expenditure growth projections and home shopping projections (special forms of trading - SFT).
- 4 updated retail sales floorspace for main food stores in the Borough based on Oxford Retail Consultant's (ORC) latest StorePoint 2020 (quarter 4 2020) database.
- 5 updated benchmark turnover estimates for food store floorspace based on GlobalData's 2019 information;
- 6 Experian's latest growth forecasts for SFT and growth in turnover efficiencies; and
- 7 analysis and recommendations on the implications of the updated need assessment and commentary on how this can be met.

Report structure

- 1.3 Section 2 of this report provides an update of the retail and food/beverage floorspace capacity assessment based on the latest available population and expenditure projections. Section 3 provides an update of the commercial leisure need assessment. Section 4 re-examines the options for accommodating the floorspace capacity and other policy implications.

2.0 Updated floorspace capacity assessment

Introduction

2.1 This section updates the quantitative scope for new retail and food/beverage floorspace in the Borough up to 2025, 2030, 2035 and 2040. The updated projections adopt Experian's latest forecasts for population growth, average expenditure per person, special forms of trading (SFT) and sales density growth rates. A further consideration is the potential implications of the Covid-19 crisis.

Implications of Covid-19 and trends

2.2 As indicated in the ERTCS 2014, historic trends indicate that consumer expenditure has grown consistently in real terms, generally following a cyclical growth trend. This growth fuelled demand for new retail floorspace. Since the last recession expenditure growth has been much slower and the demand for retail floorspace has reduced. Experian's latest forecasts suggest slower growth in the short-term and home shopping/internet spending is expected to grow at a much faster rate than traditional shopping. Experian's short-term expenditure growth projections (during 2020 and 2021) for retail and leisure expenditure now reflect the coronavirus pandemic.

2.3 The main implications of the Covid-19 crisis for the evidence base are likely to be as follows:

- impact on the reliability of demographic and economic projections i.e. population growth and Experian expenditure forecasts;
- short terms impact on the mix of uses and customer behaviour that are likely to distort the base year position; and
- longer terms structural impacts that could affect the nature of town centres and the way household shop, eat/drink out and participate in leisure activities.

2.4 The key uncertainties relating to the first two points are primarily the length of crisis/potential further lockdowns and likely recovery period. The longer term structural implications are harder to predict and quantify at this early stage.

2.5 In the short term, operators have faced elevated risk to cash flow and increased costs arising from a slump in consumer demand and disruption to supply chains. Non-essential products, hospitality and leisure services have been hardest hit. Short term supply chain disruption could lead to inflationary pressure, which may have an impact of consumer demand. Retailers with infrastructure to fulfil on-line orders/home delivery are benefiting at least in the short term.

2.6 There is likely to be a longer terms structural shift to multi-channel shopping, reducing the demand for physical space within town centres. Bearing these trends in mind, following the Covid-19 crisis there is likely to be a spike in town centre vacancies with unfortunately some businesses failing to re-open, particularly non-food retail operators and restaurants. Many national operators have already announced job losses and store closures.

2.7 The Covid-19 pandemic could have some short-term impact in terms of population migration levels and a pause in construction activity. Given that the focus of this update is to assess the long-term need over the next plan period within five year interval projections (i.e. to 2025, 2030, 2035 and 2040), the development plan should assume population projections will return to projected levels by 2025. The first interval population projections at 2025, and certainly later years, should not be significantly affected by Covid-19.

- 2.8 Office of National Statistic (ONS) monthly sales volume information for Great Britain indicates total retail sales volumes were over 22% lower in April 2020 compared with the pre-Covid-19 position in February 2020 (seasonally adjusted). However, the July to October 2020 sales volumes recovered to pre-Covid levels, with the October figure 6.7% higher than the pre-Covid figure in February. The impact of the second lockdown in November is unclear but could be similar to the drop experienced in March (-5%).
- 2.9 The comparison goods (non-food) sector was particularly affected with a 50% drop in sales from February to April, whilst the food sector experienced 10% growth in sales during March in part due to panic buying at the start of the crisis. Food sales volumes have been consistently higher than the February level during March to October.
- 2.10 ONS data suggested on-line retail sales peaked at 62% higher in June 2020 compared with February 2020. The latest figures for October 2020 were 44.9% higher than the pre-Covid sales in February 2020. Food store on-line sales doubled during May and June but still represents a relatively small proportion of total sales in this sector, reaching about 11%. On-line sales in food stores remained over 10% during July and August. For the non-food sector on-line sales as a percentage of total sales nearly trebled between February and April, reaching 44% of sales. On-line sales in this sector remain much higher than pre-Covid levels.
- 2.11 These Covid-19 affected trends are still at an early stage and it is difficult to predict the longer term implications for retail sales and the amount of on-line sales. Nevertheless, ONS's most recent data suggests retail sales should recover to previous levels of growth but the proportion of retail sales spent on-line is likely to represent a higher proportion of total sales, which will have an impact on traditional bricks and mortar retailing.
- 2.12 Experian's latest expenditure growth projections were published in October 2020 and assess the likely impact of Covid-19 and Brexit. In the longer term, beyond 2025, Experian recommends relatively modest levels of growth when compared with historic trends. These longer term forecasts should be monitored and kept under review.
- 2.13 Planning based on long terms expenditure growth projections has always had inherent uncertainties. Despite these uncertainties, the Local Plan must assume a return to reasonable rates of growth and relative normality, although the implications of the short-term impacts should not be ignored. It is better to plan for a return to growth and then modify the strategy later if levels of growth are lower than originally predicted, rather than not planning for growth because there are significant uncertainties. The latter approach is likely to fail to respond in time if higher levels of growth are achieved, and any growth will go elsewhere. Nevertheless, a cautious approach to expenditure growth and on-line shopping should be adopted.
- 2.14 For convenience goods, Experian's latest forecasts (October 2020) anticipate limited growth (0.1% per annum after 2027). Experian expects slow growth in the future, but most of the growth will relate to non-store sales. Any need for new convenience goods retail floorspace in Enfield Borough will relate to population growth and/or qualitative areas of deficiency.
- 2.15 For comparison goods, higher levels of growth are expected in the future (between 2.9% to 3% per annum), still at a lower rate than previous pre-recession trends (8% per annum between 1997 and 2007). The previous comparison goods growth forecast was slightly higher in the 2018 update at 3.2% per annum. Historically comparison goods expenditure has grown significantly more than convenience goods expenditure, and Experian's latest national growth rate recommendations are consistent with these past trends.
- 2.16 New forms of retailing (including home shopping) have and will continued to grow. Home/electronic shopping and home delivery has increased with the growth in the use of personal computers, smart phones and the internet. Click and collect / click and return

shopping has become more popular. Recent trends suggest continued strong growth in multi-channel activity. Experian's Retail Planner Briefing Note 18 (October 2020) states:

“After easing in 2021, we expect the SFT (special forms of trading (SFT) market share to continue to grow strongly in the mid-term, hitting around 30% in 2027. The pace of e-commerce is anticipated to moderate over the longer term, reaching 35% of total retail sales by 2040.”

- 2.17 The floorspace capacity assessment in this update makes an allowance for future growth in e-tailing based on Experian projections. Given the likelihood that on-line/non-store expenditure will continue to grow at a faster pace than other consumer expenditure, the capacity assessment adopts relatively cautious growth projections for expenditure and an allowance is made for operators to increase their turnover/sales density, due to growth in home shopping and click and collect.
- 2.18 Lower expenditure growth and deflationary pressures (i.e. price cutting) in the non-food sector have had an impact on the high street in the past decades. Because of these trends, the UK average shop vacancy rate (based on Goad Plan data) increased from around 10% in 2005 to about 14% in 2012. Vacancy rates gradually improved to 11.8% in 2018 but have now increased to 12.4% in 2020. It seems likely there will be a sharp increase in shop vacancies in many town centres, as and when the impacts of the Covid-19 pandemic are fully felt.
- 2.19 Property owners, landlords and funds have also come under increasing pressure with struggling occupiers seeking to renegotiate terms through company voluntary arrangement (CVA) i.e. an insolvency process designed to let a firm with debt problems reach an agreement with creditors to help pay off part or all of its debts. Elsewhere, retailers have been continuing to 'right size' their portfolios, with operators announcing store closures. These trends have impacted on rental income and the capital value of retail/leisure assets. These trends are likely to be exacerbated by the coronavirus pandemic, at least in the short-term.
- 2.20 Whilst the CVA process has created headaches for landlords in terms of rent negotiations, at the same time newly freed-up space has opened up new opportunities. Vacated premises have been reconfigured and reused for food/beverage, trampolines, climbing and indoor golf.

Study area

- 2.21 As in the ERTCS 2014, the quantitative capacity analysis is based on the defined study area zones that cover the catchment areas of the main shopping destinations in the Borough. The study area is sub-divided into seven zones as shown in Appendix 1 in the ERTCS 2014. Zones 1 to 4 divide the Borough into four quarters i.e. north east, north west, south east and south west quarters.

Population projections

- 2.22 The GLA's housing development led population projections (2018) have been adopted, as shown in Table 1 (Appendix 1). The 2018 update of the ERTCS 2014 adopted the GLA's long term trend based projections (2016). These previous projections suggested the study area population would increase by +18.9% between 2019 and 2040. The GLA's latest housing led projections suggest much lower growth (+8.8%) growth between 2019 to 2040.

Expenditure forecasts

- 2.23 All monetary values expressed in this update report are at 2018 prices, consistent with Experian's latest expenditure information. The 2018 update of the ERTCS 2014 adopted a 2016 price base and therefore the figures are not directly comparable.

- 2.24 Experian's latest national expenditure information (Experian Retail Planner Briefing Note 18 – October 2020) has been used to forecast expenditure within the Borough. Actual (rather than projected) change in average expenditure per capita during 2017, 2018 and 2019 was as follows:
- convenience goods: +2.0%;
 - comparison goods: +13.7%;
 - leisure: -1.6%.
- 2.25 Experian's short term EBS growth forecast rates during 2020, 2021 and 2022 reflect current economic circumstances, including the current Covid-19 crisis. The forecast changes during this period are as follows:
- convenience goods: +14.1%;
 - comparison goods: +1.2%;
 - leisure: -12.6%.
- 2.26 These short term forecasts, particularly for comparison goods and leisure, are relatively cautious. In the longer term, it is more difficult to forecast year on year changes in expenditure. Experian's medium and long term growth average forecasts have been adopted, as follows:
- convenience goods: 0% per annum growth for 2023 to 2027 and +0.1% per annum after 2027;
 - comparison goods: +3.0% per annum growth for 2023 to 2027 and +2.9% per annum after 2027; and
 - leisure: +2.9% per annum growth for 2023 to 2027 and +0.9% per annum after 2027.
- 2.27 These growth figures relate to real growth and exclude inflation.
- 2.28 Experian's latest adjusted deductions from total consumer retail expenditure for SFT (i.e. home and online shopping through non-retail businesses) in 2018 were:
- 3.8% of convenience goods expenditure; and
 - 16.8% of comparison goods expenditure.
- 2.29 Experian's projections suggest that these percentages will increase to 5.4% and 22.5% by 2022 respectively. The long term Experian projections suggest an increase to 7.2% and 28.2% by 2036 respectively.
- 2.30 Table 2 in Appendix 1 sets out the updated forecasts for spending per head on convenience goods within each zone in the study area up to 2040, excluding SFT. Average convenience goods expenditure is expected to reduce due to a higher proportional increase in SFT. Forecasts for comparison goods spending per capita are shown in Table 2 in Appendix 2 and food/beverage expenditure is shown in Table 2 in Appendix 3.
- 2.31 As a consequence of growth in population, total convenience goods spending within the study area is forecast to increase by +8.1% from £1,150 million in 2019 to £1,243 million in 2040, as shown in Table 3, Appendix 1.
- 2.32 Comparison goods spending is forecast to increase by +58.3% between 2019 and 2040, increasing from £1,670 million in 2018 to £2,644 million in 2040, as shown in Table 3, Appendix 2. This growth is due to population and growth in average expenditure per person, primarily the latter.
- 2.33 Food and beverage spending is forecast to increase by +22.1% between 2019 and 2040, increasing from £748 million in 2019 to £913 million in 2040, as shown in Table 3, Appendix 3.

Growth in turnover densities

- 2.34 Experian's Retail Planner Briefing Note 18, October 2020 indicates comparison goods retail sales floorspace is expected to increase its average sales density by +8% between 2019 to 2025 (average about +1.3% per annum), but higher growth is envisaged in the medium term (+3.0% per annum during 2026 and 2027), and longer term (+2.6% per annum beyond 2027). These increases have been adopted and will absorb much of the future expenditure growth. These growth rates are relatively high compared with historic forecasts but are consistent with the likely higher increase in on-line/home shopping through retail businesses i.e. the total sales of retail businesses will increase at a much higher rate than the amount of physical sales floorspace they provide. For convenience goods retail, Experian indicates a small decrease in sales densities between 2019 and 2022 and no predicted growth in sales densities thereafter.
- 2.35 Experian does not provide projections for food/beverage sales densities. Food/beverage expenditure is expected to decrease between 2019 and 2025, primarily due the impact of the Covid-19 pandemic and economic downturn. An average growth rate of 1% per annum has been adopted after 2025 when expenditure growth is expected. This annual growth rate is consistent with the ERTCS 2014.

Base year market shares

- 2.36 Expenditure patterns in the 2019 base year adopt market shares within each study area zones taken from the ERTCS 2014, with Lichfields adjustments to reflect changes since 2014 in line with the assumptions made in the 2018 update. These base year market shares are assumed to remain constant up to 2025 and beyond. It is possible Enfield Borough's market shares will fall in the future due to developments within neighbouring boroughs. In this respect the floorspace capacity projections for Enfield Borough in this update are at the higher end of the expected range.

Capacity for convenience goods retail floorspace

- 2.37 The future level of available convenience goods expenditure at 2025, 2030, 2035 and 2040 is shown at Tables 6 to 9 in Appendix 1.
- 2.38 The total level of convenience goods expenditure available for shops in the Borough between 2019 and 2040 is summarised in Table 11 in Appendix 1. Convenience expenditure available to shopping facilities in the Borough is expected to increase from £765.35 million in 2019 to £819.14 million in 2040 due to population growth.
- 2.39 Table 11 subtracts the turnover of existing floorspace from available expenditure to calculate the amount of surplus expenditure that may be available for further development or the reoccupation of vacant floorspace.
- 2.40 The updated total benchmark turnover of the existing convenience sales floorspace within the Borough is £746.50 million (Table 10, Appendix 2). These figures suggest that collectively convenience retail facilities in the Borough are trading around, or just above, the national average and there is equilibrium between sales floorspace and available expenditure. Given the high level (89%) of convenience expenditure retained in the Borough, this suggests there is a sufficient supply of convenience goods floorspace.
- 2.41 By 2025 there is a small expenditure surplus of +£14 million due to population growth. This surplus is projected to increase to +£27.83 million by 2030, growing to +£34.82 million by 2035 and +£48.91 million by 2040.

2.42 The surplus expenditure projections have been converted into potential new floorspace estimates in Table 12, Appendix 1. Surplus expenditure is converted into floorspace estimates based on an assumed average sales density figure of £12,000 per sq. m, an approximate average turnover density for main food supermarket operators (Aldi, Asda, Lidl, Morrison’s, Sainsbury’s, Tesco and Waitrose). The figures are summarised in Table 2.1 below.

Table 2.1 Convenience goods retail floorspace projections (sq.m gross - cumulative)

Area	by 2025	by 2030	by 2036	by 2040
Enfield Town	180	196	307	580
Zone 1 - Enfield North West	77	36	69	180
Zone 2 - Enfield North East	207	457	624	1,027
Zone 3 - Enfield South East	1,321	2,668	2,928	3,344
Zone 4 - Enfield South West	62	151	524	1,272
Total	1,847	3,509	4,452	6,403

Source: Table 12 in Appendix 1.

2.43 Surplus expenditure up to 2040 indicates that there is capacity for additional convenience goods floorspace in the Borough of 6,403 sq.m gross. The ERTCS 2014 suggested a much higher projection of 14,414 sq.m gross, even at a much earlier end date of 2029. The 2018 also suggested a higher projection of 11,975 sq.m gross at 2035. These differences are due to lower population growth, lower expenditure growth per person and the higher growth in deducted special forms of trading now recommended by Experian. The ERTCS 2014 assumed convenience goods expenditure per person (excluding SFT) would grow by +4.5% between 2019 and 2029. Experian’s latest figures indicate a small reduction of -0.2% between 2019 and 2040. The need for additional convenience goods floorspace relates to population growth.

2.44 The floorspace projections should be viewed in the context of total convenience goods retail floorspace within the Borough, i.e. 72,450 sq.m net (over 100,000 sq.m gross) as shown in Table 10 in Appendix 1. The 2040 projection (4,482 sq.m net or 6,403 sq.m gross) is about 6% of total convenience goods retail floorspace within the Borough

Capacity for comparison goods retail floorspace

2.45 As in the ERTCS 2014, existing comparison goods floorspace is estimated to be trading at equilibrium in 2019 (i.e. satisfactory levels). Table 10, Appendix 2 assumes that the turnover of comparison floorspace will increase in real terms in the future, as recommended by Experian (Retail Planner Briefing Note 18 – October 2020).

2.46 Table 11 subtracts the projected turnover of existing floorspace from available expenditure to calculate the amount of surplus expenditure that may be available for further development and/or the reoccupation of vacant floorspace. Within the Borough, there is a projected -£40.96 million expenditure deficit for comparison goods expenditure at 2025. This is due to relatively low expenditure growth between 2019 and 2025 due to the current and short term market conditions. These figures suggest an over-supply of comparison goods retail floorspace, which is likely to lead to an increase in vacant retail floorspace and/or emerging proposals to re-use or redevelopment comparison goods retail floorspace for other uses.

2.47 Longer-term expenditure growth between 2025 and 2035 will be offset by projected growth in the average sales densities achieved by existing floorspace. The expenditure deficit is projected to increase to -£50.34 million at 2030 but will stabilise between 2030 to 2035 and then reduce to -£25.61 million by 2040.

2.48 The comparison goods expenditure deficit is converted into net comparison sales floorspace projections at Table 11, Appendix 2, adopting an average sales density of £6,000 per sq.m net in

2018, which is projected to grow in the future due to improved turnover efficiency. The figures are summarised in Table 2.2 below.

Table 2.2 Comparison goods retail floorspace projections (sq.m gross - cumulative)

Area	by 2025	by 2030	by 2035	by 2040
Enfield Town	-4,668	-5,559	-5,104	-2,947
Zone 1 - Enfield North West	-75	-116	-116	-84
Zone 2 - Enfield North East	-1,932	-2,335	-2,201	-1,328
Zone 3 - Enfield South East	-467	623	899	1,729
Zone 4 - Enfield South West	-1,287	-1,652	-1,484	-928
Total	-8,429	-9,039	-8,006	-3,557

Source: Table 11, Appendix 2.

- 2.49 Deficit expenditure at 2040 indicates that there would be an over-supply of comparison goods floorspace in the Borough of -3,557 sq.m gross. The ERTCS 2014 suggested a positive floorspace capacity projection of +38,194 sq.m gross at the earlier end date of 2029. The 2018 update suggested 46,577 sq.m gross at 2035.
- 2.50 These significant differences are due lower expenditure growth per person suggested by Experian, higher growth in deducted special forms of trading and higher growth in sales densities. The ERTCS assumed available comparison goods expenditure would be £1,368 million by 2029 (2012 prices). The update projection for 2040 is only £1,325 million (2018 prices) despite the much later end date.
- 2.51 The over-supply floorspace projections should be viewed in the context of total comparison goods retail floorspace within the Borough, recorded as 184,926 sq.m gross in 2014. The over-supply will peak at 2030 (-9,039 sq.m gross) which is less than 5% of total comparison goods retail floorspace within the Borough.

Capacity for food/beverage floorspace

- 2.52 Experian's food and beverage expenditure per capita projections are shown in Table 2, Appendix 3. The total food and beverage expenditure in the study area is £748.04 million in 2019, as shown in Table 3. Facilities within the Borough have a base year turnover of £362.3 million.
- 2.53 Food and beverage expenditure per person is expected to increase in real terms (excluding inflation) by 13.2% between 2019 and 2040. Accounting for population growth, total food and beverage expenditure within the study area is expected to increase to £913.62 million by 2040.
- 2.54 Available food and beverage expenditure has been projected forward to 2025, 2030, 2035 and 2040 in Tables 6 to 9, Appendix 3, and summarised in Table 10. Available food and beverage expenditure to facilities within the Borough is expected to increase from £362.3 million in 2019 to £438.16 million by 2040. For the purposes of this assessment, the existing food and beverage floorspace is estimated to be trading at equilibrium in 2019 (i.e. satisfactory levels). Table 12, Appendix 3 then assumes that the turnover of food and beverage facilities will increase in real terms in the future.
- 2.55 By 2025, there will be a food and beverage expenditure deficit of -£10.65 million, due to the short term reduction in expenditure caused by the Covid-19 crisis and other expected market conditions. This expenditure deficit implies a small over-supply of floorspace at 2025. By 2030 expenditure and population growth will create an expenditure surplus of +£8.99 million, which will grow to +£11.06 million by 2035 and +£17.55 million by 2040. These expenditure projections have been converted into floorspace projections in Table 11, Appendix 3, adopting an

average sales density of £5,000 per sq. m gross, which is projected to grow by 1% in the future due to improved turnover efficiency. The results are summarised in Table 2.3 below.

Table 2.3 Food/beverage floorspace projections (sq.m gross - cumulative)

Area	by 2025	by 2030	by 2035	by 2040
Enfield Town	-983	800	891	1,328
Zone 1 - Enfield North West	-148	3	60	109
Zone 2 - Enfield North East	-75	102	104	143
Zone 3 - Enfield South East	144	722	732	781
Zone 4 - Enfield South West	-1,068	83	217	662
Total	-2,130	1,711	2,003	3,023

Source: Table 11, Appendix 3.

- 2.56 Surplus expenditure up to 2040 indicates that there is capacity for additional food/beverage floorspace in the Borough of 3,023 sq.m gross. The ERTCS 2014 suggested a much higher floorspace projection of 13,259 sq.m gross at 2029, due to higher growth in average expenditure per person. The 2018 update also suggested a higher projection of 9,649 sq.m gross at 2035.
- 2.57 The floorspaces projection should be viewed in the context of total food and beverage floorspace within the Borough, recorded as 58,400 sq.m gross in 2014. The 2040 projection (3,023 sq.m gross) is about 5% of total food/beverage floorspace within the Borough

Population growth sensitivity analysis

- 2.58 The floorspace capacity projections in this section are based on the GLA's housing development led population projections (2018), which suggest population within the study area should grow by 50,575 people (+8.8%) between 2019 and 2040. GLA's higher long-term trend based projections (2018) suggest much higher growth of 89,673 people (+15.6%).
- 2.59 If the GLA's higher long term trend based projections (2018) were adopted then the borough wide floorspace capacity projections would increase significantly, as shown in Table 2.4. The sensitivity floorspace projections are still much lower than the those suggested in the ERTCS 2014 study and the 2018 update.

Table 2.4 Borough wide floorspace capacity projections sensitivity analysis (sq.m gross - cumulative)

	GLA housing led population		GLA long term trend population	
	by 2035	by 2040	by 2035	by 2040
Convenience goods retail	4,452	6,403	10,710	14,052
Comparison goods retail	-8,006	-3,557	4,636	11,869
Food and beverage	2,003	3,023	7,302	9,383
Total	-1,551	5,869	22,648	35,304

- 2.60 This sensitivity analysis demonstrates that the projected growth in population will have a significant impact on the potential capacity for retail and food and beverage floorspace in the Borough. Major new residential allocations required to accommodate additional population growth may need new retail and food/beverage provision to serve the local needs of the development.

3.0 Commercial Leisure Assessment

Introduction

3.1 This section updates the potential for commercial leisure uses in Enfield Borough, including theatres, cinemas, ten pin bowling, bingo and health/fitness. The analysis excludes the less intensive sports uses that are not considered to be main town centre uses, e.g. sports hall and pitches within the NPPF.

Cinemas

3.2 Cinema admissions in the UK declined steadily during the 1950s to 1970s, a period when the ownership of televisions increased significantly. Cinema admissions continued to decline in the early 1980s but increased steadily after 1984 up to 2002. There was a peak in cinema admissions in 2002 at 175.9 million. Total admissions reduced to 157.5 million in 2014 but increased slowly to 176 million in 2019 (Source: British Film Institute). Cinema trips have not increased significantly since 2002, despite population growth of 9.6% during this period (59.4 million to 66.6 million). The national average visitation rate is about 2.6 trips per person per annum. Clearly the number of trips during the on-going Covid-19 crisis will have reduced significantly. This cinema assessment assumes trip levels will return to pre-Covid levels in the future.

3.3 The Cinema Advertising Association identifies 771 cinema facilities with 4,115 screens. Lichfields' national CINeSCOPE model identifies approximately 800,000 cinema seats in the UK. The average is about 190 seats per screen. The CINeSCOPE model assesses the provision of cinema screens/seats against projected customer cinema trips across the country, to identify areas of under and over-provision. The national average is about 40,000 cinema trips per screen per annum or 220 trips per seat per annum.

3.4 In Enfield Borough, the Cineworld at Southbury Leisure Park has 15 screens and 3,432 seats. The Odeon at Lee Valley has 12 screens and 959 seats. In total the Borough has 27 screens and 4,391 seats (source: UK Cinemas.org) a relatively low average of 160 seats per screen. The study area population in 2019 (573,507 people) will generate 1.491 million cinema trips per annum, based on the national average visitation rate (2.6 trips per person per annum).

3.5 Experian's local expenditure data indicates the study area currently generates about £15 million during cinema trips, which implies about £10 per trip (assuming the total trip estimate of 1.491 million trips in 2019). The Experian expenditure estimate and the cinema trip estimate appear to be consistent.

3.6 The ERTCS 2014 indicated Enfield Borough attracts approximately 58% of cinema trips from the study area. The market share and study area trip estimate above suggest existing cinemas in Enfield Borough attracted 865,000 million trips in 2019 or £8.7 million.

3.7 Based on an average of 220 trips per seat, existing cinemas in the Borough would expect to attract 755,000 trips per annum. Alternatively, based on an average of 40,000 trips per screen, existing cinemas would expect to attract 1,080,000 trips per annum. These figures suggest existing cinemas in Enfield attract more trips than the national average based on the number of seats, but less trips than the national average based on the number of screens. As indicated above, cinemas in Enfield have a relatively low average number of seats per screen. The mid-point of the required trip estimates has been adopted i.e. 918,000 trips per annum.

3.8 The figures suggest cinemas in Enfield were trading satisfactorily in 2019.

3.9 The study area population is projected to grow from 573,507 in 2019 to 624,082 in 2040. This additional population (+50,575) should generate 131,495 trips. Enfield Borough’s likely share of this growth (58%) suggests 347 seats could be supported by 2040 or 2 screens. The theoretical cinema capacity is shown in Table 3.1 below.

Table 3.1 Cinema seat/screen capacity projections (cumulative)

	by 2025	by 2030	by 2035	by 2040
Number of additional seats	110	216	272	347
Number of additional screens	0.6	1.2	1.5	1.9

Notes: Based on 58% of population growth at 2.6 trips per annum (220 trips per seat/40,000 trips per screen).

3.10 These projections suggest that there is theoretical capacity for a small cinema within the Borough but only in the long term (300 to 400 seats or 2 to 3 screens). As indicated in the ERTCS 2014, the presence of two large multiplex cinemas at Southbury and Lee Valley Leisure Parks may limit operator demand for an additional facility. However, a new niche cinema e.g. boutique or themed cinemas could complement existing multiplex cinema provision. In qualitative terms the west of the Borough is the most obvious area of deficiency. However, there is no pressing need to allocate a site for a new cinema in the Borough for the foreseeable future.

Theatres/ live music /cultural activities

3.11 These cultural activities have become blurred with multi-purposes venues holding shows, live music acts and plays. Venues generally include theatres, music halls, live music venues and nightclubs.

3.12 The UK Theatre and Society of London Theatres (SOLT) indicated their member theatre organisations (223) presented nearly 63,000 performances attracting over 34.35 million tickets visits, generating ticket revenue of £1.28 billion in 2018. The average ticket revenue per venue is £5.7 million. The UK average attendance per performance is 545.

3.13 The nightclub/live music sector (not including music halls) has struggled in recent years. IBISWorld (providers of global industry research) suggests these venues have lost their competitive advantage over pubs or bars, with lower prices and a more relaxed atmosphere.

3.14 Approximately one-quarter of nightclubs have closed in the past decade as operators have struggled to respond to new challenges from regulation, licensing, planning, business rates and policing.

3.15 Experian’s local expenditure data indicates the study area generates £26.3 million on live theatre, concerts and shows, excluding nightclubs. Based on the average ticket revenue per venue (£5.7 million) the study area population generates theoretical demand for 4 to 5 theatre/music venues.

3.16 The ERTCS 2014 indicated Enfield Borough attracted only 9% of theatre trips generated by the study area population, with the vast majority going to other parts of London including the West End. The ERTCS 2014 also indicated Enfield Borough only attracted 4% of trips to nightclubs generated by the study area.

3.17 Enfield Borough’s theatre/show/music venues include: Intimate Theatre at Palmers Green, Dugdale at Enfield, Chickenshed at Cockfosters, Skewbald Theatre in Enfield and Millfield Theatre at Edmonton.

3.18 The household survey results indicated that only 8.4% of households in the study area visit nightclubs and less than 4% of these households visited a nightclub in Enfield Borough, with 95% visiting 'Other London'. The provision of nightclubs in Central London will limit the

potential for major new nightclubs in the Borough but small or medium nightclub facilities may be viable.

- 3.19 As indicated in the ERTCS 2014, accessibility to theatres, show, music and nightclub venues within Central London will have an impact on the likely demand for additional facilities in the Borough. The relatively short journey to Central London will help meet the Borough's need for high profile, national performances. The impact of the Covid pandemic is also likely to suppress demand in the short term. There is no clear need for additional theatre, music or nightclub provision in the Borough. However, the development strategy needs to be flexible to respond to emerging opportunities for attractive new facilities of this kind.

Health and fitness clubs

- 3.20 The 2019 State of the UK Fitness Industry Report reveals that the UK health and fitness industry is continuing to grow. There are now more than 10 million fitness members in the UK and the industry is worth £5 billion, and the penetration is now 15.6%. The sector has more clubs, more members and a greater market value than ever before. The 2019 report highlighted that the industry experienced growth over the twelve-month period to the end of March 2019, with an increase of 4.7% in the number of memberships and 2.9% growth in the number of facilities.
- 3.21 The Sport England/Active Places data for 2020 indicates that there are 30 registered health and fitness suites in the Borough, with 1,710 fitness stations. Eleven of these facilities are for private use/sports club/community association use only (159 fitness stations). The remaining 19 registered facilities are open to the general public (including registered members) and have 1,551 fitness stations in total, as shown in Table 3.2.

Table 3.2 Enfield Borough health and fitness suites

Name	Type	No. Fitness Stations
Pure Gym, Southgate	Registered Membership use	220
The Gym, Edmonton Green	Registered Membership use	170
Musleworks Gym, Enfield	Registered Membership use	140
Pure Gym, Enfield	Registered Membership use	120
David Lloyd, Enfield	Registered Membership use	110
Southbury Leisure Centre	Registered Membership use	92
Edmonton Leisure Centre	Registered Membership use	90
Southgate Leisure Centre	Pay and Play	90
Energie Fitness, Enfield	Registered Membership use	75
Muscle Limit, Enfield Highway	Pay and Play	73
Albany Leisure Centre, Enfield Highway	Pay and Play	70
Energie Fitness, Palmers Green	Pay and Play	70
Nuffield Health, Enfield	Registered Membership use	65
Paramount Heath & Fitness, Palmers Green	Registered Membership use	60
Anytime Fitness, Ponders End	Registered Membership use	35
Muscle Base Gym, Ponders End	Registered Membership use	30
Enfield Grammar School, Enfield	Registered Membership use	20
Lee Valley Athletic Centre	Pay and Play	11
Oasis Academy Hadley, Ponders End	Pay and Play	10

Source: Sport England Active Places 2020

- 3.22 The study area population was 573,507 people in 2019. The ERTCS 2014 indicated Enfield Borough attracts approximately 53% of health and fitness users within the study area, suggesting a health and fitness catchment population of about 304,000 in 2019. This population

estimate indicates that Enfield Borough has about 5.6 (Sport England registered) fitness stations per 1,000 people. Growth in population between 2019 and 2040 in the study area is +50,575 people. Based on the current market share (53%) Enfield Borough's health and fitness catchment population is projected to increase to 312,500 by 2025, 320,700 by 2030, 324,900 by 2035 and 330,800 by 2040.

3.23 Greater London has 933 Sport England registered health and fitness suites with 65,994 fitness stations (average of 70 stations per facility). This existing provision equates to about 7.5 fitness stations per 1,000 people in London. Enfield's catchment population has a lower provision of fitness stations (5.6 per 1,000 people) than the London average (7.5 stations). This lower provision in Enfield Borough may be due to net out-commuting and work-related linked trips and/or the demographic profile of the Borough.

3.24 The projected health and fitness catchment population at 2025, 2030, 2035 and 2040 based on the Enfield Borough average could support:

- 1,750 fitness stations by 2025 (40 additional stations);
- 1,796 fitness stations by 2030 (86 additional stations);
- 1,819 fitness stations by 2035 (109 additional stations); or
- 1,852 fitness stations by 2040 (142 additional stations).

3.25 These projections suggests an additional health and fitness facility could be required in the Borough before 2030 (average 70 stations) and a further facility by 2040. Alternatively, the increase in health and fitness catchment population (+20,900 by 2035) could support 117 additional fitness stations or about 2 facilities, with an additional facility by 2040 (3 in total).

3.26 There appears to be scope for additional 2 health and fitness facilities by 2035 (around 70 fitness stations each) and 3 facilities by 2040.

Ten Pin Bowling

3.27 The ERTCS 2014 suggested that just over 19% of households in the study area visit tenpin bowling facilities. The majority (66%) of these respondents visited the Hollywood Bowl in Finchley and around 12% visited Rowans at Finsbury Park, with 18% going elsewhere in London.

3.28 The population of LB Enfield (Zones 1 to 4) is about 335,700 in 2019. This population as a whole could theoretically support 28 lanes, based on one lane per 12,000 people (national average). Population growth within the Borough (23,500 between 2019 and 2040), could support a further 2 lanes.

3.29 These figures suggest there is theoretical capacity to support a tenpin bowling facility within LB Enfield.

Bingo

3.30 Buzz Bingo (previously Gala) and Mecca are the main bingo operators, controlling over half of the UK market. Marketing of the bingo sector has been more proactive in recent years and Gala and Mecca have invested in premises, moving out of dated premises (i.e. converted cinemas) into purpose-built units. Bingo clubs have become increasingly sophisticated and have actively sought to attract all age groups. The bingo sector usually prefers central locations that are accessible by public transport and by foot. However, the significant increase in on-line gambling has, and will continue to affect this sector.

3.31 The Gambling Commission indicates there were 650 bingo facilities in Great Britain (2018) and 152 casinos. This equates to approximately one bingo facility per 75,000 adults, and one casino per 330,000 adults. The adult (over 18) population in the Enfield Borough in 2019 was 251,000, which could in theory support 3 bingo facilities and potentially one casino. The household survey results within the ERTCS 2014 suggested that only 3.9% of households in the study area visit bingo facilities, compared with the national average participation rate of around 5%, which implies theoretical scope for 2 bingo facilities in the Borough.

3.32 Buzz Bing has a facility at Colosseum Retail Park in Enfield and another club at Waltham Cross. Mecca has a facility at Wood Green. Population growth may generate additional demand in the long-term for an additional bingo facility in the Borough but the impact of the growth in on-line gambling will need to be monitored and there is no pressing need to allocate a site for this use at this stage. However, the Buzz Bingo site at Colosseum Retail Park is expected to be redeveloped. This facility could be replaced elsewhere in the Borough subject to operator demand.

Trampoline centres and other leisure uses

3.33 The leisure, entertainment and cultural sector is fragmented and innovative. In addition to the main leisure and entertainment uses outlined above, there are a larger number of other activities that could be promoted within town centres e.g. museums, art galleries, exhibition space, casinos, tourist attractions and new emerging leisure activities such as trampoline centres, family entertainment centres, escape rooms and virtual golf activities. Given the fragmented nature of this sector it is difficult to quantify the potential demand for these uses, particularly in the long term.

3.34 Indoor trampoline centres are a recent example of a new innovation and is a relatively new leisure activity in the UK. In America outdoor trampoline centres were popular in the late 1950s and 1960s. This format has been adopted and modernised and is now becoming a popular indoor leisure activity for a variety of age groups in the UK. The UK's first indoor trampoline centre was opened by Bounce on 31 May 2014.

3.35 Trampoline centres offer a new, recreational experience for both children and adults and typically have over 100 interconnected trampolines, consisting of different courts including a Main Arena, Dodgeball Court, Kids Court, Slam Dunk Area, Foam Pit, Airbag Jump, Touch Walls, Gladiator Pits and Tumble Tracks, as well as an arcade and party rooms. Operators include Flip Out, Bounce, Gravity and Go Jumpin. There is a Go Jumpin at Lumina Way, Enfield and a Flipout at Cricklewood to the west of the Borough.

3.36 This sector and other leisure innovation's potential for continued growth is unclear. The study area population provides a critical mass and could attract a broad range of leisure, entertainment and cultural uses. Additional leisure provision for new innovations should be considered within town centres, particularly if the level of vacant retail premises increases significantly. The development strategy needs to be flexible and have the ability to respond to emerging opportunities for new facilities of this kind, particularly in the main town centres.

4.0

Policy implications

Introduction

4.1

The revised National Planning Policy Framework (NPPF) indicates development plans should allocate a range of suitable sites in town centres to meet the scale and type of development likely to be needed, looking at least ten years from the start of the development plan. Meeting anticipated needs for retail, leisure, office and other main town centre uses over this period should not be compromised by limited site availability.

Accommodating growth and floorspace projections

4.2

Tables 4.1, 4.2 and 4.3 below summarise the floorspace projections by broad location up to 2030, 2035 and 2040. The distribution of floorspace is based on the existing market shares and expenditure patterns. These projections are based on the GLA housing led population projections and the 2040 projections could be viewed as the minimum requirement for the next plan period. As shown by the sensitivity analysis in Section 2.0, the GLA long term population projections suggest a combined floorspace capacity of 22,648 sq.m gross by 2035. The GLA indicates the housing led projections offer the best estimate of future populations at ward and borough level, and these projections are the appropriate for determining the need for additional retail and food/beverage floorspace In Enfield Borough.

Table 4.1 Summary of floorspace projections up to 2030 (sq.m gross)

Area	Convenience	Comparison	Food/beverage	Total
Enfield Town	196	-5,559	800	-4,563
Zone 1 - Enfield North West	36	-116	3	-77
Zone 2 - Enfield North East	457	-2,335	102	-1,776
Zone 3 - Enfield South East	2,668	623	722	4,013
Zone 4 - Enfield South West	151	-1,652	83	-1,418
Total	3,509	-9,039	1,711	-3,819

Table 4.2 Summary of floorspace projections up to 2035 (sq.m gross)

Area	Convenience	Comparison	Food/beverage	Total
Enfield Town	307	-5,104	891	-3,906
Zone 1 - Enfield North West	69	-116	60	13
Zone 2 - Enfield North East	624	-2,201	104	-1,473
Zone 3 - Enfield South East	2,928	899	732	4,559
Zone 4 - Enfield South West	524	-1,484	217	-743
Total	4,452	-8,006	2,003	-1,551

Table 4.3 Summary of floorspace projections up to 2040 (sq.m gross)

Area	Convenience	Comparison	Food/beverage	Total
Enfield Town	580	-2,947	1,328	-1,039
Zone 1 - Enfield North West	180	-84	109	205
Zone 2 - Enfield North East	1,027	-1,328	143	-158
Zone 3 - Enfield South East	3,344	1,729	781	5,854
Zone 4 - Enfield South West	1,272	-928	662	1,006
Total	6,403	-3,557	3,023	5,869

Source: Table 12 in Appendix 1, Table 11 in Appendix 2 and Table 11 Appendix 3.

- 4.3 The retail capacity analysis in this report assumes existing retail and food/beverage floorspace can, on average, increase its turnover to sales floorspace densities, particularly if retail businesses can maintain recent growth in on-line sales through stores. In addition to the growth in sales densities, vacant floorspace should help to accommodate residual future growth and not all of the projections in Tables 4.1 to 4.3 will require the development of new floorspace.
- 4.4 The ERTCS 2014 indicated there were 133 vacant shop units within the Borough, which equated to an overall vacancy rate of 5.4%, lower than the Goad national average (for all UK centres and destinations surveyed by Goad in 2014) of 12.1%. GLA Town Centre Health Check data at 2016 suggested the London average vacancy rate was 8.6%, much lower than the UK average. The total amount of vacant floorspace in Enfield Borough was about 13,300 sq.m gross in 2014 (about 100 sq.m gross per vacant unit). The ERTCS 2014 suggested, as a best case, it would be reasonable to assume the level of vacant retail floorspace in the Borough could fall by 25%, i.e. 5.4% to around 4%, a fall from 133 vacant to 98 vacant units. As a result of this reduction, the reoccupation of 35 vacant units could accommodate about 3,500 sq.m gross for retail and/or food and beverage use, based on an average of 100 sq.m gross per unit re-occupied.
- 4.5 Town centre health check audits undertaken for the Council in April 2021 indicate there were 53 vacant units in the five main centres compared with 36 vacant units recorded in 2014. It is unclear the extent to which the number of vacant shop units has changed within the local centres between 2014 and 2021, but anecdotally officers suggest the vacancy rate has increased rather than reduced in recent years. There is likely to have been a spike in shop vacancy rates in 2021 due to the impact of the Covid-19 pandemic and the economic downturn. This spike in vacant floorspace is reflected in negative short term comparison goods retail and food/beverage floorspace projections at 2025. If correct the 2025 floorspace projections imply the amount of vacant floorspace would increase from about 13,300 sq.m gross (pre-Covid) to about 22,000 sq.m gross, increasing the shop vacancy rate from 5.4% to about 8.9%.
- 4.6 Current information suggests the number of vacant shop units in the Borough is at least 150 units or about 15,000 sq.m gross. If 25% of this vacant floorspace can be reoccupied, then there is capacity to accommodate new uses of about 4,000 sq.m gross.
- 4.7 In reality the amount of comparison goods retail floorspace is likely to reduce through changes of use and redevelopment. For example, the proposed redevelopment of Colosseum Retail Park if implemented, would result in the reduction of over 10,000 sq.m gross of retail and food/beverage floorspace, which could in itself offset the projected over-supply of floorspace at 2025.
- 4.8 Given the projected decline in comparison floorspace it seems other proposals to redevelop and repurpose other retail parks are likely to emerge in the future. As an alternative to comparison retail use, these locations provide scope to sustainably meet employment and housing needs, without creating an under-supply of comparison goods retail floorspace in the Borough.
- 4.9 The future strategy should continue to assume that, in the original 2014 base year there was physical capacity to accommodate 3,500 sq.m gross of retail and food/beverage in reoccupied vacant shop units within designated centres.

Enfield Town Centre

- 4.10 The medium and long term floorspace projections for Enfield Town are negative with an over-supply of floorspace at 2025, 2030, 2035 and 2040. The ERTCS 2014 suggested vacant shop units in Enfield Town could accommodate about 700 sq.m gross. Information collated for the GLA's centre health checks in 2016 suggested Enfield Town had a higher level of vacant space i.e. 3,170 sq.m gross of vacant retail floorspace (20 units). Town centre health check audits undertaken for the Council in April 2021 indicate there were more (26) vacant units in Enfield

Town, probably about 4,000 sq.m gross. It may now be reasonable to assume vacant floorspace in Enfield Town could accommodate about 1,700 sq.m gross of new uses. Vacant floorspace in Enfield Town should be capable of accommodating any residual capacity for the foreseeable future.

- 4.11 If development opportunities emerge in Enfield town centre, that can accommodate additional retail and food/beverage floorspace, then there should be an opportunity to redistribute expenditure capacity from other zones, in particular Zone 3 and Zone 4 (south east and south west Enfield).

North West Enfield (Zone 1)

- 4.12 This zone has limited retail provision. The long-term 2040 floorspace projections for North West Enfield are modest i.e. only 205 sq.m gross. The ERTCS 2014 suggested vacant shop units in local centres in this zone could accommodate about 1,000 sq.m gross. This vacant floorspace should be capable of accommodating any residual capacity for the foreseeable future. The projections suggest a long term over-supply of floorspace in this zone, particularly comparison goods floorspace.

- 4.13 However, there may be potential to redistribute surplus retail floorspace capacity from Zone 4 (south west Enfield). Furthermore, as indicated in Section 2.0, the higher population growth sensitivity analysis suggests any major new residential allocations in North West Enfield may need new retail and food/beverage provision to serve the local needs of the development. Retail, food/beverage and leisure provision within residential allocations should be of an appropriate scale to serve the development and an impact assessment should be prepared to demonstrate the development will have an acceptable impact on existing designated centres.

North East Enfield (Zone 2)

- 4.14 Residents in this zone have good access to Enfield town centre. Comparison goods retail provision in this zone is dominated by retail parks. The long-term 2040 floorspace projections for North West Enfield is limited i.e. -158 sq.m gross. The ERTCS 2014 suggested vacant shop units in local centres in this zone could accommodate about 800 sq.m gross. This vacant floorspace should be capable of accommodating any residual capacity for the foreseeable future.

- 4.15 The projections in this zone also suggest a long term over-supply of floorspace, particularly comparison goods floorspace, but there should be potential to redistribute surplus retail floorspace from Zone 3 (south east Enfield). Major new residential allocations in North East Enfield including the Lee Valley Opportunity Area will need new retail and food/beverage provision to serve the local needs of the development. As in Zone 1, retail, food/beverage and leisure provision within residential allocations should be of an appropriate scale to serve the development and an impact assessment should be prepared to demonstrate the development will have an acceptable impact on existing designated centres.

South East Enfield (Zone 3)

- 4.16 The long-term floorspace projections for South East Enfield are the highest in the Borough i.e. 4,559 sq.m gross at 2035 increasing to 5,854 sq.m gross by 2040. Most of this zone forms part of the Lee Valley Opportunity Area (LVOA) in the London Plan. The floorspace capacity figures take account the GLA's population growth projections for the LVOA.

- 4.17 The ERTCS 2014 suggested vacant shop units in local centres in this zone could only accommodate about 300 sq.m gross. More recent information collated for the GLA's centre health checks suggested Angel Edmonton and Edmonton Green district centres had 3,790 sq.m gross of vacant retail floorspace (17 units), compared with 8 vacant units recorded in 2014.

Town centre health check audits undertaken for the Council in April 2021 indicate there were 13 vacant units in Angel Edmonton and Edmonton Green, probably about 3,000 sq.m gross. Assuming 25% of vacant floorspace in Angel Edmonton and Edmonton Green can be reoccupied (up to 800 sq.m gross), vacant units within the zone (including local centres) could now accommodate around 1,100 sq.m gross, leaving a residual projection of about 3,500 sq.m gross at 2035 and 4,800 sq.m gross at 2040.

- 4.18 Proposals for a new neighbourhood at Meridian Water including new retail, leisure and community facilities could accommodate any residual capacity over the plan period. The scale, nature and phasing of retail development at Meridian Water will need to be carefully considered in order to avoid an unacceptable retail impact on Edmonton Green and Angel Edmonton district centres.

South West Enfield (Zone 4)

- 4.19 Residents in this zone have good access to Enfield town centre in the north or Wood Green town centre to the south. The long-term floorspace projections for South West Enfield is relatively modest at 1,006 sq.m gross by 2040. The ERTCS 2014 suggested vacant shop units in local centres in this zone could accommodate about 1,100 sq.m gross. More recent information collated for the GLA's centre health checks suggests Palmers Green district centre has 1,630 sq.m gross of vacant retail floorspace (13 units), compared with 2 vacant units recorded in 2014. Town centre health check audits undertaken for the Council in April 2021 indicate there were 7 vacant units in Palmers Green, probably about 900 sq.m gross.

- 4.20 Assuming 25% of vacant floorspace in Palmers Green can be reoccupied (about 200 sq.m gross), vacant units within the zone (including local centres) could now accommodate around 1,300 sq.m gross. Vacant units within the zone should be capable of accommodating any residual capacity for the foreseeable future.

Changes to the Use Classes Order

- 4.21 On 1 September 2020, the Use Classes Order (UCO) was significantly amended. Changes to town centre use classes now allow far greater flexibility for uses to change within town centres without the need to obtain planning permission. The UCO has significant implications for shop frontage planning policies, restricting the ability of local planning authorities to control the mix of uses and retain specific uses previously protected e.g. Class A1 retail. Temporary changes to permitted changes of use up to at least July 2021 will provide further flexibility.

- 4.22 In relation to main town centre uses, as defined in the NPPF Annex 2 glossary, the UCO changes provide for three new use classes:

- Class E (Commercial, business and service);
- Class F.1 (Learning and non-residential institutions); and
- Class F.2 (Local community).

- 4.23 The UCO changes now combine: Shops (A1), financial/professional services (A2), cafés/restaurants (A3), indoor sports/fitness (D2 part), medical health facilities (D1 part), creche/nurseries and office/business uses (B1) into the new single Use Class E. The new Class E includes some uses that are not defined as 'main town centre uses' within the NPPF e.g. medical services and some light industrial uses.

- 4.24 Other changes potentially introduce more restrictions rather than flexibility. Partly in response to the impact of the Covid-19 crisis, there is added protection against the loss of learning, non-residential and community facilities, including museums public halls, sports facilities and local

shops. These uses are now included in new Classes F1 and F2. Class F.2 also includes small isolated shops (at least 1 kilometre from a similar shop) selling essential goods including food.

- 4.25 Other potential 'bad neighbour' town centre uses have been placed in the list of Sui Generis uses, with no permitted changes of use e.g. pubs/bars (A4), takeaways (A5), cinemas and live music venues. The inclusion of these uses as Sui Generis appears to have a dual function i.e. controlling potential 'bad neighbour' uses such as pub/bars and takeaways, whilst protecting against the loss of other cultural facilities such as cinemas and music venues, most vulnerable to the impacts of Covid-19.
- 4.26 The previous distinction between Class A3, A4 and A5 uses will now become more critical, with Class A3 uses now having more flexibility in the new Class E, but more limited flexibility for Class A4 and A5 uses. Many Class A3 restaurants have offered a takeaway service during the Covid-19 crisis and the categorisation of bar/restaurants has always been arguable and will be a matter of fact and degree on a case by case basis. The Council will need to re-categorise existing uses within centres to reflect the new UCO before appropriate policy options can be considered.
- 4.27 The potential implications of permitted changes in use outside town centres may also have unintended consequences. In theory large out-of-centre B1 office buildings or D2 commercial leisure uses, with no restrictive conditions, could be converted to retail use without planning permission or an assessment of the impact on the town centre or application of the sequential test. This change could have implications for the effectiveness of retail impact and sequential tests policies.

Impact assessments

- 4.28 The revised NPPF states that, when assessing applications for retail and leisure development outside of town centres, which are not in accordance with an up to date local plan, local planning authorities should require an impact assessment if the development is over a proportionate, locally set threshold. Impact assessments are no longer required for office developments, as in the original NPPF.
- 4.29 The revised NPPF/PPG still indicate that where authorities decide not to set out specific floorspace thresholds in local development plans, national policy requires impact assessments to be submitted for retail and leisure developments over 2,500 sq.m gross.
- 4.30 Retail and leisure uses previously related to use classes A1 to A5 and D2 leisure uses. Changes to the UCO may lead to confusion, at least until the NPPF is amended to reflect the UCO changes. For example, not all uses within the new Class E are retail or leisure uses, requiring an impact assessment i.e. offices and medical uses. Bearing in mind the potential for confusion arising from the UCO changes and for consistency with the NPPF, future policy relating to the impact test may need to refer to retail and leisure activities rather than the new UCO classes.
- 4.31 As indicated in the ERTCS 2014, the NPPF minimum threshold of 2,500 sq.m gross continues to be an inappropriate blanket threshold across Enfield Borough, because this scale of development would represent a significant proportion of the overall retail projections for all parts of the Borough. The projected over-supply of floorspace for the foreseeable future and likely post-Covid spike in shop vacancy rates suggest a more cautious approach is appropriate.
- 4.32 The ERTC 2014 indicated a reduced threshold of 1,000 sq.m gross should be considered in the Borough. This ERTCS 2014 recommendation should be view in the context of much higher floorspace capacity projections at that time. The adoption of lower a threshold is now endorsed by the updated floorspace capacity projections and recent market conditions.

- 4.33 The Council should consider adopting an impact threshold that is consistent with the Sunday trading limit i.e. 400 sq.m gross (280 sq.m net assuming a net to gross ratio of 70%). The Sunday trading limit (280 sq.m net) is the maximum size of retail unit that is not restricted to Sunday trading hours and is often used as an appropriate threshold for small local facilities. This approach has been adopted in other London Boroughs. However, development plan policies should indicate that impact assessments should be proportionate and related to the scale of development proposed.

Frontage policies and retaining an appropriate mix of uses

- 4.34 The ERTC 2014 referred to the Council's detailed review of town centre uses and boundaries in March 2013 that informed the Development Management Document. No centre boundaries or frontage policy changes were recommended in the ERTC 2014.
- 4.35 Town centre boundaries in Enfield Borough will remain important when applying the sequential test, i.e. to direct retail, leisure and other town centre uses to sustainable locations and determine whether a retail/leisure impact assessment is required. The revised NPPF still indicates that the first preference for retail uses should be the primary shopping area. The first preference for other town centre uses, such as commercial leisure and office uses, is normally the wider defined town centre, which usually includes the primary shopping area and other parts of town centres.
- 4.36 The validity of this approach is now questionable with the merger of retail with many other main town centre uses into the new Class E. For example, a proposed leisure use within Class E will satisfy the sequential approach if it is located within the town centre boundary but outside the primary shopping area. This proposed leisure use can subsequently change to retail use without planning permission. With the introduction of Class E, the effectiveness of a separate primary shopping area for sequential test purposes is unclear.
- 4.37 Development plan policies should continue to define centre boundaries on the proposals map. The centre boundaries should provide sufficient clarification in relation to the need for an impact and sequential assessment.
- 4.38 The revised NPPF does not refer to restrictive policies within designated shopping frontages. The aim of the revised NPPF appears to create more flexibility and encourage positive strategies for town centres. Four broad policy approaches could be adopted in Enfield Borough, as follows:
- 1 strengthening policy to provide more control over the loss of retail uses i.e. extending protected frontages and/or introducing more rigid policy criteria;
 - 2 retaining the current approach in the adopted development plan;
 - 3 relaxing adopted policy to allow a more flexible approach to enable more non-retail uses; or
 - 4 a laissez-faire approach that does not seek to protect retail and town centre uses, on the basis that the market will determine the appropriate mix of uses.
- 4.39 In light of likely future market trends, the revised lower retail floorspace capacity projections, changes to the UCO described earlier, Option 1 is an unsound and unimplementable approach. The UCO changes prevent a more restrictive approach, recognising that the introduction of Article 4 directions can only remove permitted GPDO changes of uses but not movement within the same use class i.e. new Class E. The continuation of the current adopted policy approach (Option 2) will also be hampered by the UCO changes. As a result of these recent changes, Options 3 and 4 now appear to be the most likely approaches the Council should consider.
- 4.40 The Council should undertake a review of centre boundaries and the appropriateness of frontage policies.

Summary

- 4.41 Across the Borough as a whole, the projections suggest an over-supply of floorspace up to and beyond 2035, with a longer term capacity projection of just under 5,900 sq.m gross at 2040.
- 4.42 Vacant shop units (based on 2014 levels in local centres and 2021 levels in the five main centres) could theoretically accommodate about 5,900 sq.m of this projection. Proposals for a new neighbourhood at Meridian Water could accommodate any residual capacity over the plan period.
- 4.43 These floorspace capacity projections are based on the GLA's recommended housing development led population projections. The GLA's long-term trend based projections suggest much higher growth, which if achieved would increase the floorspace capacity projection to about 22,600 sq.m gross by 2035 increasing to 35,300 sq.m gross by 2040.
- 4.44 Vacant floorspace could reduce the 2035 sensitivity projection to 16,700 sq.m gross, and retail and food/beverage development at Meridian Water would also need to be subtracted from this projection.
- 4.45 Major residential allocations required to accommodate additional population growth is likely to include new retail and food/beverage provision to serve the local needs of the development, which could accommodate residual capacity as required.
- 4.46 Based on the much lower floorspace capacity projections and likely market conditions, the Council should consider adopting an impact threshold that is consistent with the Sunday trading limit i.e. 400 sq.m gross (280 sq.m net).

Appendix 1 Convenience goods capacity

Table 1: Study area population

Zone	2019	2025	2030	2035	2040
Zone 1 - Enfield North West	57,197	58,516	57,758	57,548	58,412
Zone 2 - Enfield North East	83,724	82,862	83,489	84,044	85,674
Zone 3 - Enfield South East	90,628	98,407	106,655	107,229	108,673
Zone 4 - Enfield South West	104,175	103,469	103,147	103,941	106,485
Zone 5 - Barnet East	63,607	63,644	64,758	66,988	68,175
Zone 6 - Haringey North	108,221	114,906	119,286	122,689	125,242
Zone 7 - Waltham Forest West	65,955	67,804	69,875	70,678	71,421
Total	573,507	589,608	604,969	613,117	624,082

Source: GLA housing led ward level population projections 2018

Table 2: Convenience goods expenditure per person (£)

Zone	2019	2025	2030	2035	2040
Zone 1 - Enfield North West	2,240	2,234	2,226	2,230	2,234
Zone 2 - Enfield North East	1,886	1,882	1,875	1,879	1,882
Zone 3 - Enfield South East	1,829	1,824	1,818	1,821	1,824
Zone 4 - Enfield South West	2,253	2,247	2,240	2,244	2,248
Zone 5 - Barnet East	2,157	2,152	2,144	2,148	2,152
Zone 6 - Haringey North	1,791	1,786	1,780	1,783	1,786
Zone 7 - Waltham Forest West	2,016	2,012	2,005	2,008	2,012

Experian local estimates for 2018 convenience goods expenditure per capita (2018 prices)

Experian projections and deductions for special forms of trading - Retail Briefing Note 18 (October 2020)

Table 3: Total convenience goods expenditure (£m)

Zone	2019	2025	2030	2035	2040
Zone 1 - Enfield North West	128.12	130.72	128.57	128.33	130.49
Zone 2 - Enfield North East	157.90	155.95	156.54	157.92	161.24
Zone 3 - Enfield South East	165.76	179.49	193.90	195.26	198.22
Zone 4 - Enfield South West	234.71	232.49	231.05	233.24	239.38
Zone 5 - Barnet East	137.20	136.96	138.84	143.89	146.71
Zone 6 - Haringey North	193.82	205.22	212.33	218.76	223.68
Zone 7 - Waltham Forest West	132.97	136.42	140.10	141.92	143.70
Total	1,150.48	1,177.27	1,201.33	1,219.32	1,243.42

Source: Tables 1 and 2

Table 4: Base year convenience goods market shares (%)

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	% Inflow
Enfield Town	32.4%	18.2%	1.7%	6.9%	0.9%	7.3%	1.1%	5.0%
Zone 1 - Enfield North West	22.8%	3.6%	0.0%	2.0%	2.8%	0.7%	1.9%	5.0%
Zone 2 - Enfield North East	19.6%	48.7%	12.8%	8.6%	1.0%	3.5%	3.8%	5.0%
Zone 3 - Enfield South East	1.0%	13.0%	59.9%	1.7%	0.0%	11.9%	3.2%	15.0%
Zone 4 - Enfield South West	14.1%	5.4%	9.1%	72.7%	17.1%	5.5%	0.2%	5.0%
LB Enfield Total	89.9%	88.9%	83.5%	91.9%	21.8%	28.9%	10.2%	
LB Barnet	1.7%	0.3%	0.2%	3.1%	44.8%	3.2%	0.4%	n/a
Broxbourne	4.3%	8.5%	1.0%	0.7%	0.0%	1.2%	5.9%	n/a
LB Haringey	1.2%	0.0%	13.5%	4.1%	28.9%	62.0%	0.5%	n/a
Waltham Forest	0.0%	0.0%	0.6%	0.0%	0.0%	1.2%	75.4%	n/a
Other	2.9%	2.3%	1.2%	0.2%	4.5%	3.5%	7.6%	n/a
Other Sub-Total	10.1%	11.1%	16.5%	8.1%	78.2%	71.1%	89.8%	n/a
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	n/a

Source: NEMS Household Survey March 2014, LB Haringey Retail and Town Centres Study 2013 and Lichfields' adjustments

Table 5: Base year 2019 convenience goods expenditure patterns (£m)

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	% Inflow	Total
Expenditure 2019	128.12	157.90	165.76	234.71	137.20	193.82	132.97		1150.48
Enfield Town	41.51	28.74	2.82	16.19	1.23	14.15	1.46	5.58	111.69
Zone 1 - Enfield North West	29.21	5.68	0.00	4.69	3.84	1.36	2.53	2.49	49.81
Zone 2 - Enfield North East	25.11	76.90	21.22	20.18	1.37	6.78	5.05	8.24	164.86
Zone 3 - Enfield South East	1.28	20.53	99.29	3.99	0.00	23.06	4.25	26.90	179.30
Zone 4 - Enfield South West	18.07	8.53	15.08	170.63	23.46	10.66	0.27	12.98	259.68
LB Enfield Total	115.18	140.38	138.41	215.70	29.91	56.01	13.56	56.20	765.35
LB Barnet	2.18	0.47	0.33	7.28	61.47	6.20	0.53	n/a	78.46
Broxbourne	5.51	13.42	1.66	1.64	0.00	2.33	7.84	n/a	32.40
LB Haringey	1.54	0.00	22.38	9.62	39.65	120.17	0.66	n/a	194.02
Waltham Forest	0.00	0.00	0.99	0.00	0.00	2.33	100.26	n/a	103.58
Other	3.72	3.63	1.99	0.47	6.17	6.78	10.11	n/a	32.87
Other Sub-Total	12.94	17.53	27.35	19.01	107.29	137.81	119.40	n/a	441.33
TOTAL	128.12	157.90	165.76	234.71	137.20	193.82	132.97	n/a	1206.68

Source: Table 3 and 4

Table 6: Future 2025 convenience goods expenditure patterns (£m)

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	% Inflow	Total
Expenditure 2025	130.72	155.95	179.49	232.49	136.96	205.22	136.42		1177.27
Enfield Town	42.35	28.38	3.05	16.04	1.23	14.98	1.50	5.66	113.21
Zone 1 - Enfield North West	29.81	5.61	0.00	4.65	3.83	1.44	2.59	2.52	50.46
Zone 2 - Enfield North East	25.62	75.95	22.98	19.99	1.37	7.18	5.18	8.33	166.60
Zone 3 - Enfield South East	1.31	20.27	107.52	3.95	0.00	24.42	4.37	28.56	190.40
Zone 4 - Enfield South West	18.43	8.42	16.33	169.02	23.42	11.29	0.27	13.01	260.20
LB Enfield Total	117.52	138.64	149.88	213.66	29.86	59.31	13.91	58.08	780.86
LB Barnet	2.22	0.47	0.36	7.21	61.36	6.57	0.55	n/a	78.73
Broxbourne	5.62	13.26	1.79	1.63	0.00	2.46	8.05	n/a	32.81
LB Haringey	1.57	0.00	24.23	9.53	39.58	127.24	0.68	n/a	202.83
Waltham Forest	0.00	0.00	1.08	0.00	0.00	2.46	102.86	n/a	106.40
Other	3.79	3.59	2.15	0.46	6.16	7.18	10.37	n/a	33.71
Other Sub-Total	13.20	17.31	29.62	18.83	107.10	145.91	122.51	n/a	454.49
TOTAL	130.72	155.95	179.49	232.49	136.96	205.22	136.42	n/a	1235.35

Source: Table 3 and 4

Table 7: Future 2030 convenience goods expenditure patterns (£m)

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	% Inflow	Total
Expenditure 2030	128.57	156.54	193.90	231.05	138.84	212.33	140.10		1201.33
Enfield Town	41.66	28.49	3.30	15.94	1.25	15.50	1.54	5.67	113.34
Zone 1 - Enfield North West	29.31	5.64	0.00	4.62	3.89	1.49	2.66	2.51	50.11
Zone 2 - Enfield North East	25.20	76.24	24.82	19.87	1.39	7.43	5.32	8.44	168.70
Zone 3 - Enfield South East	1.29	20.35	116.15	3.93	0.00	25.27	4.48	30.26	201.72
Zone 4 - Enfield South West	18.13	8.45	17.64	167.97	23.74	11.68	0.28	13.05	260.95
LB Enfield Total	115.58	139.17	161.91	212.33	30.27	61.36	14.29	59.91	794.82
LB Barnet	2.19	0.47	0.39	7.16	62.20	6.79	0.56	n/a	79.76
Broxbourne	5.53	13.31	1.94	1.62	0.00	2.55	8.27	n/a	33.20
LB Haringey	1.54	0.00	26.18	9.47	40.13	131.64	0.70	n/a	209.66
Waltham Forest	0.00	0.00	1.16	0.00	0.00	2.55	105.64	n/a	109.35
Other	3.73	3.60	2.33	0.46	6.25	7.43	10.65	n/a	34.44
Other Sub-Total	12.99	17.38	31.99	18.72	108.57	150.97	125.81	n/a	466.42
TOTAL	128.57	156.54	193.90	231.05	138.84	212.33	140.10	n/a	1261.24

Source: Table 3 and 4

Table 8: Future 2035 convenience goods expenditure patterns (£m)

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	% Inflow	Total
Expenditure 2035	128.33	157.92	195.26	233.24	143.89	218.76	141.92		1219.32
Enfield Town	41.58	28.74	3.32	16.09	1.30	15.97	1.56	5.71	114.27
Zone 1 - Enfield North West	29.26	5.69	0.00	4.66	4.03	1.53	2.70	2.52	50.39
Zone 2 - Enfield North East	25.15	76.91	24.99	20.06	1.44	7.66	5.39	8.51	170.11
Zone 3 - Enfield South East	1.28	20.53	116.96	3.97	0.00	26.03	4.54	30.58	203.90
Zone 4 - Enfield South West	18.09	8.53	17.77	169.57	24.61	12.03	0.28	13.20	264.08
LB Enfield Total	115.37	140.39	163.04	214.35	31.37	63.22	14.48	60.53	802.75
LB Barnet	2.18	0.47	0.39	7.23	64.46	7.00	0.57	n/a	82.31
Broxbourne	5.52	13.42	1.95	1.63	0.00	2.63	8.37	n/a	33.53
LB Haringey	1.54	0.00	26.36	9.56	41.58	135.63	0.71	n/a	215.39
Waltham Forest	0.00	0.00	1.17	0.00	0.00	2.63	107.01	n/a	110.81
Other	3.72	3.63	2.34	0.47	6.48	7.66	10.79	n/a	35.08
Other Sub-Total	12.96	17.53	32.22	18.89	112.52	155.53	127.45	n/a	477.10
TOTAL	128.33	157.92	195.26	233.24	143.89	218.76	141.92	n/a	1279.85

Source: Table 3 and 4

Table 9: Future 2040 convenience goods expenditure patterns (£m)

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	% Inflow	Total
Expenditure 2040	130.49	161.24	198.22	239.38	146.71	223.68	143.70		1243.42
Enfield Town	42.28	29.35	3.37	16.52	1.32	16.33	1.58	5.83	116.57
Zone 1 - Enfield North West	29.75	5.80	0.00	4.79	4.11	1.57	2.73	2.57	51.31
Zone 2 - Enfield North East	25.58	78.52	25.37	20.59	1.47	7.83	5.46	8.67	173.49
Zone 3 - Enfield South East	1.30	20.96	118.73	4.07	0.00	26.62	4.60	31.11	207.40
Zone 4 - Enfield South West	18.40	8.71	18.04	174.03	25.09	12.30	0.29	13.52	270.37
LB Enfield Total	117.31	143.34	165.51	219.99	31.98	64.64	14.66	61.70	819.14
LB Barnet	2.22	0.48	0.40	7.42	65.73	7.16	0.57	n/a	83.98
Broxbourne	5.61	13.71	1.98	1.68	0.00	2.68	8.48	n/a	34.14
LB Haringey	1.57	0.00	26.76	9.81	42.40	138.68	0.72	n/a	219.94
Waltham Forest	0.00	0.00	1.19	0.00	0.00	2.68	108.35	n/a	112.22
Other	3.78	3.71	2.38	0.48	6.60	7.83	10.92	n/a	35.70
Other Sub-Total	13.18	17.90	32.71	19.39	114.73	159.04	129.04	n/a	485.98
TOTAL	130.49	161.24	198.22	239.38	146.71	223.68	143.70	n/a	1305.12

Source: Table 3 and 4

Table 10: Convenience goods sales floorspace and benchmark turnover 2019

Area/centre	Store	Sales Floorspace (sq.m net)	Convenience Goods Floorspace (%)	Convenience Goods Floorspace (sq.m net)	Turnover Density (£ per sq.m)	Total Turnover (£m)
Enfield Town Area	Waitrose, Palace Gardens SC	1,570	90%	1,413	£12,420	£17.55
	Marks & Spencer, Palace Gardens	697	100%	697	£10,313	£7.19
	Iceland, Palace Exchange	389	98%	381	£6,645	£2.53
	Tesco, Southbury Road	2,227	90%	2,004	£13,236	£26.53
	Morrisons, Southbury Road	3,689	90%	3,320	£12,342	£40.98
	Sainsbury's Crown Road	5,014	80%	4,011	£11,526	£46.23
	Lidl, Cecil Road	948	85%	806	£10,542	£8.49
	Other Enfield Town	780	100%	780	£7,000	£5.46
	Local centres/parades near Enfield Town	2,425	100%	2,425	£6,500	£15.76
	Sub-Total	17,739		15,838		£170.73
Edmonton Green Area	Iceland, North Square	492	98%	395	£6,645	£2.62
	Asda, West Mall	4,390	75%	3,293	£13,618	£44.84
	Lidl, The Concourse	863	85%	734	£10,542	£7.73
	Home Bargains	1,132	30%	340	£3,835	£1.30
	Other Edmonton Green centre	2,213	100%	2,213	£7,000	£15.49
	Local centres/parades near Edmonton Green	392	100%	392	£6,500	£2.55
	Sub-Total	9,482		7,366		£74.54
Upper (Angel) Edmonton	Tesco Extra, Glover Drive	4,792	75%	3,594	£13,236	£47.57
	Tesco Express, Fore Street	267	90%	240	£13,236	£3.18
	Lidl, Sterling Way	1,496	85%	1,272	£10,542	£13.41
	Other Upper Edmonton	1,767	100%	1,767	£7,000	£12.37
	Local centres/parades near Upper Edmonton	498	100%	498	£6,500	£3.24
	Sub-Total	8,820		7,371		£79.76
Palmers Green	Co-op, Green Lanes	640	95%	505	£11,171	£5.64
	Waitrose, Green Lanes	1,807	90%	1,626	£12,420	£20.20
	Morrisons, Aldermans Hill	2,369	85%	2,014	£12,342	£24.85
	Other Palmers Green/Aldemans Hill	2,200	100%	2,200	£7,000	£15.40
	Sub-Total	7,016		6,345		£66.09
Southgate	Asda, Chase Side	5,499	70%	3,849	£13,618	£52.42
	Tesco Express, Chase Side	235	95%	223	£13,236	£2.95
	Marks & Spencer, Winchmore Hill Road	1,027	95%	976	£10,313	£10.06
	Other Southgate	995	100%	995	£7,000	£6.97
	Sub-Total	7,756		6,043		£72.40
Other LB Enfield	Aldi, Enfield Retail Park	1,393	80%	1,114	£10,542	£11.75
	Asda, High Street, Ponders End	953	90%	858	£13,618	£11.68
	Budgens, Bullsmoor Lane	84	95%	80	£8,354	£0.67
	Co-op, Cockfosters Parade	336	95%	319	£11,171	£3.57
	Co-op, Hertford Road	233	95%	221	£11,171	£2.47
	Co-op, 200 Lancaster Road	308	95%	293	£11,171	£3.27
	Co-op, 102 Lancaster Road	231	95%	219	£11,171	£2.45
	Co-op, Lavender Hill Enfield	78	95%	74	£11,171	£0.83
	Co-op, Leighton Road	177	95%	168	£11,171	£1.88
	Lidl, Hertford Lock, Enfield Lock	1,285	80%	1,028	£10,542	£10.84
	Little Waitrose, Windmill Hill, Enfield Chase	445	95%	423	£12,420	£5.25
	Marks & Spencer, Cockfosters Road	84	95%	80	£10,313	£0.82
	Marks & Spencer, Mollison Avenue	84	95%	80	£10,313	£0.82
	Marks & Spencer, North Middlesex Hospital	700	95%	665	£10,313	£6.86
	Sainsbury's Local Arnos Grove	199	95%	189	£11,526	£2.18
	Sainsbury's Local Clock Parade London Road	314	95%	298	£11,526	£3.44
	Sainsbury's Local Green Lanes	289	95%	275	£11,526	£3.16
	Sainsbury's Local Lancaster Road	259	95%	246	£11,526	£2.84
	Sainsbury's Local St Mark's Road	331	95%	314	£11,526	£3.62
	Sainsbury's Local, Cockfosters	179	95%	170	£11,526	£1.96
	Sainsbury's, Florey Square, Winchmore Hill	1,479	95%	1,405	£11,526	£16.19
	Sainsbury's, Green Lanes, Winchmore Hill	4,522	80%	3,618	£11,526	£41.70
	Tesco Express, Bramley Road	116	95%	110	£13,236	£1.46
	Tesco Express, Bullsmoor Lane	116	95%	110	£13,236	£1.46
	Tesco Express, Enfield Island Centre Way	194	95%	184	£13,236	£2.44
	Tesco Express, Green Lanes, Winchmore Hill	116	95%	110	£13,236	£1.46
	Tesco Express, Hertford Road	116	95%	110	£13,236	£1.46
	Tesco Express, Windmill Hill	193	95%	183	£13,236	£2.43
	Tesco Extra, High Street, Ponders End	5,622	70%	3,935	£13,236	£52.09
	Other Local Shops - Large Local Centres	8,414	100%	8,414	£6,500	£54.69
	Other Local Shops - Small Local Centres	1,298	100%	1,298	£6,500	£8.44
	Other Local Shops - Local Shopping Parades	2,895	100%	2,895	£6,500	£18.82
	Sub-Total	33,043		29,488		£282.98
	LB Enfield Total		83,856		72,450	£10,304

Source: LB Enfield Land Use Survey 2014, Storepoint 2020 and Global Data 2019

Table 11: Summary of convenience goods expenditure 2019 to 2040

Area	2019	2025	2030	2035	2040
Available expenditure in LB Enfield (£m)					
Enfield Town	111.69	113.21	113.34	114.27	116.57
Zone 1 - Enfield North West	49.81	50.46	50.11	50.39	51.31
Zone 2 - Enfield North East	164.86	166.60	168.70	170.11	173.49
Zone 3 - Enfield South East	179.30	190.40	201.72	203.90	207.40
Zone 4 - Enfield South West	259.68	260.20	260.95	264.08	270.37
Total	765.35	780.86	794.82	802.75	819.14
Turnover of existing facilities (£m)					
Enfield Town	111.69	111.69	111.69	111.69	111.69
Zone 1 - Enfield North West	49.81	49.81	49.81	49.81	49.81
Zone 2 - Enfield North East	164.86	164.86	164.86	164.86	164.86
Zone 3 - Enfield South East	179.30	179.30	179.30	179.30	179.30
Zone 4 - Enfield South West	259.68	259.68	259.68	259.68	259.68
Total	765.35	765.35	765.35	765.35	765.35
Surplus expenditure (£m)					
Enfield Town	0.00	1.51	1.65	2.58	4.88
Zone 1 - Enfield North West	0.00	0.65	0.31	0.58	1.51
Zone 2 - Enfield North East	0.00	1.74	3.84	5.24	8.62
Zone 3 - Enfield South East	0.00	11.09	22.41	24.60	28.09
Zone 4 - Enfield South West	0.00	0.52	1.27	4.40	10.69
Total	0.00	14.00	27.83	34.82	48.91

Source: Tables 5 to 10

Table 12: Convenience goods floorspace capacity 2019 to 2040

Area	2019	2025	2030	2035	2040
Turnover density new floorspace (£ psm net)	£12,000	£12,000	£12,000	£12,000	£12,000
Floorspace capacity (sq.m net)					
Enfield Town	0	126	137	215	406
Zone 1 - Enfield North West	0	54	26	48	126
Zone 2 - Enfield North East	0	145	320	437	719
Zone 3 - Enfield South East	0	924	1,868	2,050	2,341
Zone 4 - Enfield South West	0	43	106	367	891
Total	0	1,293	2,456	3,117	4,482
Floorspace capacity (sq.m gross)					
Enfield Town	0	180	196	307	580
Zone 1 - Enfield North West	0	77	36	69	180
Zone 2 - Enfield North East	0	207	457	624	1,027
Zone 3 - Enfield South East	0	1,321	2,668	2,928	3,344
Zone 4 - Enfield South West	0	62	151	524	1,272
Total	0	1,847	3,509	4,452	6,403

Appendix 2 Comparison goods capacity

Table 1: Study area population

Zone	2019	2025	2030	2035	2040
Zone 1 - Enfield North West	57,197	58,516	57,758	57,548	58,412
Zone 2 - Enfield North East	83,724	82,862	83,489	84,044	85,674
Zone 3 - Enfield South East	90,628	98,407	106,655	107,229	108,673
Zone 4 - Enfield South West	104,175	103,469	103,147	103,941	106,485
Zone 5 - Barnet East	63,607	63,644	64,758	66,988	68,175
Zone 6 - Haringey North	108,221	114,906	119,286	122,689	125,242
Zone 7 - Waltham Forest West	65,955	67,804	69,875	70,678	71,421
Total	573,507	589,608	604,969	613,117	624,082

Source: GLA housing led ward level population projections 2018

Table 2: Comparison goods expenditure per person (£)

Zone	2019	2025	2030	2035	2040
Zone 1 - Enfield North West	3,744	3,782	4,238	4,809	5,502
Zone 2 - Enfield North East	2,420	2,444	2,739	3,108	3,556
Zone 3 - Enfield South East	2,248	2,270	2,544	2,887	3,303
Zone 4 - Enfield South West	3,704	3,742	4,193	4,758	5,444
Zone 5 - Barnet East	3,549	3,585	4,017	4,558	5,215
Zone 6 - Haringey North	2,242	2,265	2,538	2,880	3,295
Zone 7 - Waltham Forest West	2,972	3,002	3,365	3,818	4,368

Experian local estimates for 2018 convenience goods expenditure per capita (2018 prices)

Experian projections and deductions for special forms of trading - Retail Briefing Note 18 (October 2020)

Table 3: Total comparison goods expenditure (£m)

Zone	2019	2025	2030	2035	2040
Zone 1 - Enfield North West	214.14	221.31	244.78	276.75	321.38
Zone 2 - Enfield North East	202.61	202.52	228.68	261.21	304.66
Zone 3 - Enfield South East	203.73	223.38	271.33	309.57	358.95
Zone 4 - Enfield South West	385.87	387.18	432.50	494.55	579.70
Zone 5 - Barnet East	225.74	228.16	260.13	305.33	355.53
Zone 6 - Haringey North	242.63	260.26	302.75	353.35	412.67
Zone 7 - Waltham Forest West	196.02	203.55	235.13	269.85	311.97
Total	1,670.75	1,726.36	1,975.29	2,270.60	2,644.86

Source: Tables 1 and 2

Table 4: Base year comparison goods market shares (%)

Zone/Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	% Inflow
Enfield Town	45.5%	45.9%	22.2%	25.8%	11.7%	6.2%	8.9%	5.0%
Zone 1 - Cockfosters	1.7%	0.0%	0.0%	0.2%	0.0%	0.0%	0.0%	5.0%
Other Zone 1	0.4%	0.0%	0.0%	0.1%	0.2%	0.0%	0.2%	5.0%
Zone 2 - Ponders End	0.5%	2.4%	0.7%	0.5%	0.0%	0.0%	0.0%	5.0%
Other Zone 2	18.2%	20.9%	7.0%	6.7%	1.7%	2.4%	2.5%	15.0%
Zone 3 - Edmonton Green	0.3%	3.9%	30.9%	1.6%	0.6%	4.2%	0.0%	5.0%
Zone 3 - Upper (Angel) Edmonton	0.0%	0.0%	0.8%	0.0%	0.0%	0.1%	0.0%	5.0%
Other Zone 3	1.1%	1.5%	8.8%	4.0%	1.4%	3.2%	2.4%	15.0%
Zone 4 - Palmers Green	0.6%	0.0%	0.9%	7.8%	0.4%	0.5%	0.0%	5.0%
Zone 4 - Southgate	1.4%	0.1%	0.2%	5.5%	3.3%	1.3%	0.0%	5.0%
Other Zone 4	1.0%	0.1%	0.1%	3.6%	0.3%	0.2%	0.0%	5.0%
LB Enfield Total	70.7%	74.8%	71.6%	55.8%	19.6%	18.1%	14.0%	
LB Barnet	4.6%	1.3%	1.0%	12.5%	56.9%	5.4%	2.0%	n/a
Broxbourne	5.2%	10.5%	1.0%	2.3%	0.4%	0.3%	4.6%	n/a
LB Haringey	0.1%	4.7%	14.7%	8.8%	9.0%	57.7%	1.3%	n/a
Waltham Forest	0.1%	0.7%	2.8%	0.3%	0.3%	0.8%	50.7%	n/a
Central London	11.9%	5.7%	5.2%	17.0%	9.1%	12.6%	7.1%	n/a
Other	7.4%	2.3%	3.7%	3.3%	4.7%	5.1%	20.3%	n/a
Other Sub-Total	29.3%	25.2%	28.4%	44.2%	80.4%	81.9%	86.0%	n/a
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	n/a

Source: NEMS Household Survey March 2014 with Lichfields adjustments

Table 5: Base year 2019 comparison goods expenditure patterns (£m)

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	% Inflow	Total
Expenditure 2019	214.14	202.61	203.73	385.87	225.74	242.63	196.02		1670.75
Enfield Town	97.44	93.00	45.23	99.55	26.41	15.04	17.45	20.74	414.86
Zone 1 - Cockfosters	3.64	0.00	0.00	0.77	0.00	0.00	0.00	0.23	4.64
Other Zone 1	0.86	0.00	0.00	0.39	0.45	0.00	0.39	0.11	2.20
Zone 2 - Ponders End	1.07	4.86	1.43	1.93	0.00	0.00	0.00	0.49	9.78
Other Zone 2	38.97	42.35	14.26	25.85	3.84	5.82	4.90	24.00	160.00
Zone 3 - Edmonton Green	0.64	7.90	62.95	6.17	1.35	10.19	0.00	4.70	93.91
Zone 3 - Upper (Angel) Edmonton	0.00	0.00	1.63	0.00	0.00	0.24	0.00	0.10	1.97
Other Zone 3	2.36	3.04	17.93	15.43	3.16	7.76	4.70	9.60	63.98
Zone 4 - Palmers Green	1.28	0.00	1.83	30.10	0.90	1.21	0.00	1.86	37.19
Zone 4 - Southgate	3.00	0.20	0.41	21.22	7.45	3.15	0.00	1.86	37.30
Other Zone 4	2.14	0.20	0.20	13.89	0.68	0.49	0.00	0.93	18.53
LB Enfield Total	151.40	151.55	145.87	215.31	44.25	43.92	27.44	64.62	844.36
LB Barnet	9.85	2.63	2.04	48.23	128.45	13.10	3.92	n/a	208.22
Broxbourne	11.14	21.27	2.04	8.87	0.90	0.73	9.02	n/a	53.97
LB Haringey	0.21	9.52	29.95	33.96	20.32	140.00	2.55	n/a	236.50
Waltham Forest	0.21	1.42	5.70	1.16	0.68	1.94	99.38	n/a	110.49
Central London	25.48	11.55	10.59	65.60	20.54	30.57	13.92	n/a	178.25
Other	15.85	4.66	7.54	12.73	10.61	12.37	39.79	n/a	103.55
Other Sub-Total	62.74	51.06	57.86	170.55	181.50	198.71	168.58	n/a	891.00
TOTAL	214.14	202.61	203.73	385.87	225.74	242.63	196.02	n/a	1735.36

Source: Table 3 and 4

Table 6: Future 2025 comparison goods expenditure patterns (£m)

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	% Inflow	Total
Expenditure 2025	221.31	202.52	223.38	387.18	228.16	260.26	203.55		1726.36
Enfield Town	100.69	92.95	49.59	99.89	26.70	16.14	18.12	21.27	425.35
Zone 1 - Cockfosters	3.76	0.00	0.00	0.77	0.00	0.00	0.00	0.24	4.78
Other Zone 1	0.89	0.00	0.00	0.39	0.46	0.00	0.41	0.11	2.25
Zone 2 - Ponders End	1.11	4.86	1.56	1.94	0.00	0.00	0.00	0.50	9.96
Other Zone 2	40.28	42.33	15.64	25.94	3.88	6.25	5.09	24.60	163.99
Zone 3 - Edmonton Green	0.66	7.90	69.03	6.19	1.37	10.93	0.00	5.06	101.14
Zone 3 - Upper (Angel) Edmonton	0.00	0.00	1.79	0.00	0.00	0.26	0.00	0.11	2.16
Other Zone 3	2.43	3.04	19.66	15.49	3.19	8.33	4.89	10.06	67.09
Zone 4 - Palmers Green	1.33	0.00	2.01	30.20	0.91	1.30	0.00	1.88	37.63
Zone 4 - Southgate	3.10	0.20	0.45	21.29	7.53	3.38	0.00	1.89	37.85
Other Zone 4	2.21	0.20	0.22	13.94	0.68	0.52	0.00	0.94	18.72
LB Enfield Total	156.46	151.48	159.94	216.05	44.72	47.11	28.50	66.65	870.91
LB Barnet	10.18	2.63	2.23	48.40	129.83	14.05	4.07	n/a	211.39
Broxbourne	11.51	21.26	2.23	8.91	0.91	0.78	9.36	n/a	54.97
LB Haringey	0.22	9.52	32.84	34.07	20.53	150.17	2.65	n/a	250.00
Waltham Forest	0.22	1.42	6.25	1.16	0.68	2.08	103.20	n/a	115.02
Central London	26.34	11.54	11.62	65.82	20.76	32.79	14.45	n/a	183.32
Other	16.38	4.66	8.27	12.78	10.72	13.27	41.32	n/a	107.39
Other Sub-Total	64.84	51.03	63.44	171.13	183.44	213.15	175.05	n/a	922.10
TOTAL	221.31	202.52	223.38	387.18	228.16	260.26	203.55	n/a	1793.01

Source: Table 3 and 4

Table 7: Future 2030 comparison goods expenditure patterns (£m)

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	% Inflow	Total
Expenditure 2030	244.78	228.68	271.33	432.50	260.13	302.75	235.13		1975.29
Enfield Town	111.37	104.96	60.24	111.58	30.44	18.77	20.93	24.12	482.41
Zone 1 - Cockfosters	4.16	0.00	0.00	0.86	0.00	0.00	0.00	0.26	5.29
Other Zone 1	0.98	0.00	0.00	0.43	0.52	0.00	0.47	0.13	2.53
Zone 2 - Ponders End	1.22	5.49	1.90	2.16	0.00	0.00	0.00	0.57	11.34
Other Zone 2	44.55	47.79	18.99	28.98	4.42	7.27	5.88	27.86	185.74
Zone 3 - Edmonton Green	0.73	8.92	83.84	6.92	1.56	12.72	0.00	6.04	120.73
Zone 3 - Upper (Angel) Edmonton	0.00	0.00	2.17	0.00	0.00	0.30	0.00	0.13	2.60
Other Zone 3	2.69	3.43	23.88	17.30	3.64	9.69	5.64	11.70	77.97
Zone 4 - Palmers Green	1.47	0.00	2.44	33.73	1.04	1.51	0.00	2.12	42.32
Zone 4 - Southgate	3.43	0.23	0.54	23.79	8.58	3.94	0.00	2.13	42.64
Other Zone 4	2.45	0.23	0.27	15.57	0.78	0.61	0.00	1.05	20.95
LB Enfield Total	173.06	171.05	194.27	241.33	50.99	54.80	32.92	76.10	994.51
LB Barnet	11.26	2.97	2.71	54.06	148.02	16.35	4.70	n/a	240.07
Broxbourne	12.73	24.01	2.71	9.95	1.04	0.91	10.82	n/a	62.16
LB Haringey	0.24	10.75	39.89	38.06	23.41	174.69	3.06	n/a	290.09
Waltham Forest	0.24	1.60	7.60	1.30	0.78	2.42	119.21	n/a	133.15
Central London	29.13	13.03	14.11	73.52	23.67	38.15	16.69	n/a	208.31
Other	18.11	5.26	10.04	14.27	12.23	15.44	47.73	n/a	123.08
Other Sub-Total	71.72	57.63	77.06	191.16	209.15	247.95	202.21	n/a	1,056.88
TOTAL	244.78	228.68	271.33	432.50	260.13	302.75	235.13	n/a	2051.39

Source: Table 3 and 4

Table 8: Future 2035 comparison goods expenditure patterns (£m)

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	% Inflow	Total
Expenditure 2035	276.75	261.21	309.57	494.55	305.33	353.35	269.85		2270.60
Enfield Town	125.92	119.89	68.72	127.59	35.72	21.91	24.02	27.57	551.35
Zone 1 - Cockfosters	4.70	0.00	0.00	0.99	0.00	0.00	0.00	0.30	5.99
Other Zone 1	1.11	0.00	0.00	0.49	0.61	0.00	0.54	0.14	2.90
Zone 2 - Ponders End	1.38	6.27	2.17	2.47	0.00	0.00	0.00	0.65	12.94
Other Zone 2	50.37	54.59	21.67	33.13	5.19	8.48	6.75	31.80	211.98
Zone 3 - Edmonton Green	0.83	10.19	95.66	7.91	1.83	14.84	0.00	6.91	138.17
Zone 3 - Upper (Angel) Edmonton	0.00	0.00	2.48	0.00	0.00	0.35	0.00	0.15	2.98
Other Zone 3	3.04	3.92	27.24	19.78	4.27	11.31	6.48	13.42	89.46
Zone 4 - Palmers Green	1.66	0.00	2.79	38.57	1.22	1.77	0.00	2.42	48.43
Zone 4 - Southgate	3.87	0.26	0.62	27.20	10.08	4.59	0.00	2.45	49.08
Other Zone 4	2.77	0.26	0.31	17.80	0.92	0.71	0.00	1.20	23.96
LB Enfield Total	195.66	195.38	221.65	275.96	59.84	63.96	37.78	87.01	1,137.24
LB Barnet	12.73	3.40	3.10	61.82	173.73	19.08	5.40	n/a	279.25
Broxbourne	14.39	27.43	3.10	11.37	1.22	1.06	12.41	n/a	70.98
LB Haringey	0.28	12.28	45.51	43.52	27.48	203.88	3.51	n/a	336.45
Waltham Forest	0.28	1.83	8.67	1.48	0.92	2.83	136.81	n/a	152.81
Central London	32.93	14.89	16.10	84.07	27.79	44.52	19.16	n/a	239.46
Other	20.48	6.01	11.45	16.32	14.35	18.02	54.78	n/a	141.41
Other Sub-Total	81.09	65.82	87.92	218.59	245.49	289.39	232.07	n/a	1,220.37
TOTAL	276.75	261.21	309.57	494.55	305.33	353.35	269.85	n/a	2357.61

Source: Table 3 and 4

Table 9: Future 2040 comparison goods expenditure patterns (£m)

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	% Inflow	Total
Expenditure 2040	321.38	304.66	358.95	579.70	355.53	412.67	311.97		2644.86
Enfield Town	146.23	139.84	79.69	149.56	41.60	25.59	27.77	32.12	642.38
Zone 1 - Cockfosters	5.46	0.00	0.00	1.16	0.00	0.00	0.00	0.35	6.97
Other Zone 1	1.29	0.00	0.00	0.58	0.71	0.00	0.62	0.17	3.37
Zone 2 - Ponders End	1.61	7.31	2.51	2.90	0.00	0.00	0.00	0.75	15.08
Other Zone 2	58.49	63.67	25.13	38.84	6.04	9.90	7.80	37.04	246.92
Zone 3 - Edmonton Green	0.96	11.88	110.91	9.28	2.13	17.33	0.00	8.03	160.53
Zone 3 - Upper (Angel) Edmonton	0.00	0.00	2.87	0.00	0.00	0.41	0.00	0.17	3.46
Other Zone 3	3.54	4.57	31.59	23.19	4.98	13.21	7.49	15.63	104.18
Zone 4 - Palmers Green	1.93	0.00	3.23	45.22	1.42	2.06	0.00	2.83	56.70
Zone 4 - Southgate	4.50	0.30	0.72	31.88	11.73	5.36	0.00	2.87	57.37
Other Zone 4	3.21	0.30	0.36	20.87	1.07	0.83	0.00	1.40	28.04
LB Enfield Total	227.22	227.88	257.01	323.47	69.68	74.69	43.68	101.36	1,324.99
LB Barnet	14.78	3.96	3.59	72.46	202.30	22.28	6.24	n/a	325.62
Broxbourne	16.71	31.99	3.59	13.33	1.42	1.24	14.35	n/a	82.63
LB Haringey	0.32	14.32	52.77	51.01	32.00	238.11	4.06	n/a	392.59
Waltham Forest	0.32	2.13	10.05	1.74	1.07	3.30	158.17	n/a	176.78
Central London	38.24	17.37	18.67	98.55	32.35	52.00	22.15	n/a	279.32
Other	23.78	7.01	13.28	19.13	16.71	21.05	63.33	n/a	164.29
Other Sub-Total	94.16	76.77	101.94	256.23	285.85	337.98	268.29	n/a	1,421.23
TOTAL	321.38	304.66	358.95	579.70	355.53	412.67	311.97	n/a	2746.22

Source: Table 3 and 4

Table 10: Summary of comparison goods expenditure 2019 to 2040 (£M)

Area	2019	2025	2030	2035	2040
Available expenditure in LB Enfield					
Enfield Town	414.86	425.35	482.41	551.35	642.38
Zone 1 - Enfield North West	6.84	7.02	7.82	8.89	10.34
Zone 2 - Enfield North East	169.77	173.96	197.08	224.92	262.00
Zone 3 - Enfield South East	159.87	170.38	201.30	230.61	268.16
Zone 4 - Enfield South West	93.02	94.20	105.90	121.47	142.11
Total	844.36	870.91	994.51	1,137.24	1,324.99
Turnover of existing facilities					
Enfield Town	414.86	448.03	513.37	583.67	663.59
Zone 1 - Enfield North West	6.84	7.39	8.46	9.62	10.94
Zone 2 - Enfield North East	169.77	183.35	210.08	238.85	271.56
Zone 3 - Enfield South East	159.87	172.65	197.83	224.92	255.72
Zone 4 - Enfield South West	93.02	100.46	115.11	130.87	148.79
Total	844.36	911.88	1,044.85	1,187.93	1,350.60
Surplus/deficit expenditure					
Enfield Town	n/a	-22.69	-30.96	-32.32	-21.21
Zone 1 - Enfield North West	n/a	-0.36	-0.65	-0.73	-0.60
Zone 2 - Enfield North East	n/a	-9.39	-13.00	-13.93	-9.56
Zone 3 - Enfield South East	n/a	-2.27	3.47	5.69	12.45
Zone 4 - Enfield South West	n/a	-6.26	-9.20	-9.40	-6.68
Total	n/a	-40.96	-50.34	-50.68	-25.61

Sources: Tables 5 to 9

Table 11: Comparison goods floorspace capacity 2019 to 2040

Area	2019	2025	2030	2035	2040
Turnover density new floorspace (£ psm net)	6,000	6,480	7,425	8,441	9,597
Floorspace capacity (sq.m net)					
Enfield Town	n/a	-3,501	-4,170	-3,828	-2,210
Zone 1 - Enfield North West	n/a	-56	-87	-87	-63
Zone 2 - Enfield North East	n/a	-1,449	-1,751	-1,651	-996
Zone 3 - Enfield South East	n/a	-350	468	675	1,297
Zone 4 - Enfield South West	n/a	-966	-1,239	-1,113	-696
Total	n/a	-6,322	-6,780	-6,004	-2,668
Floorspace capacity (sq.m gross)					
Enfield Town	n/a	-4,668	-5,559	-5,104	-2,947
Zone 1 - Enfield North West	n/a	-75	-116	-116	-84
Zone 2 - Enfield North East	n/a	-1,932	-2,335	-2,201	-1,328
Zone 3 - Enfield South East	n/a	-467	623	899	1,729
Zone 4 - Enfield South West	n/a	-1,287	-1,652	-1,484	-928
Total	n/a	-8,429	-9,039	-8,006	-3,557

Appendix 3 Food/beverage capacity

Table 1: Study area population

Zone	2019	2025	2030	2035	2040
Zone 1 - Enfield North West	57,197	58,516	57,758	57,548	58,412
Zone 2 - Enfield North East	83,724	82,862	83,489	84,044	85,674
Zone 3 - Enfield South East	90,628	98,407	106,655	107,229	108,673
Zone 4 - Enfield South West	104,175	103,469	103,147	103,941	106,485
Zone 5 - Barnet East	63,607	63,644	64,758	66,988	68,175
Zone 6 - Haringey North	108,221	114,906	119,286	122,689	125,242
Zone 7 - Waltham Forest West	65,955	67,804	69,875	70,678	71,421
Total	573,507	589,608	604,969	613,117	624,082

Source: GLA housing led ward level population projections 2018

Table 2: Food and beverage expenditure per person (£)

Zone	2019	2025	2030	2035	2040
Zone 1 - Enfield North West	1,573	1,497	1,628	1,703	1,781
Zone 2 - Enfield North East	1,055	1,004	1,092	1,142	1,194
Zone 3 - Enfield South East	1,014	965	1,050	1,098	1,148
Zone 4 - Enfield South West	1,663	1,582	1,721	1,800	1,883
Zone 5 - Barnet East	1,627	1,548	1,684	1,761	1,842
Zone 6 - Haringey North	1,091	1,038	1,129	1,181	1,235
Zone 7 - Waltham Forest West	1,259	1,198	1,303	1,363	1,425

Experian local estimates for 2018 food and beverage expenditure per capita (2018 prices)
Experian growth projections for leisure expenditure - Retail Briefing Note 18 (October 2020)

Table 3: Total food and beverage expenditure (£m)

Zone	2019	2025	2030	2035	2040
Zone 1 - Enfield North West	89.97	87.60	94.03	98.00	104.03
Zone 2 - Enfield North East	88.33	83.19	91.17	95.98	102.29
Zone 3 - Enfield South East	91.90	94.96	111.99	117.74	124.76
Zone 4 - Enfield South West	173.24	163.69	177.52	187.09	200.51
Zone 5 - Barnet East	103.49	98.52	109.05	117.97	125.58
Zone 6 - Haringey North	118.07	119.27	134.67	144.90	154.67
Zone 7 - Waltham Forest West	83.04	81.23	91.05	96.33	101.78
Total	748.04	728.46	809.48	858.01	913.62

Source: Tables 1 and 2

Table 4: Base Year food and beverage market shares (%)

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	% Inflow
Enfield Town	47.2%	57.9%	28.9%	9.9%	10.9%	9.4%	4.9%	5.0%
Zone 1 - Enfield North West	2.4%	0.0%	0.5%	2.5%	8.6%	0.4%	0.0%	5.0%
Zone 2 - Enfield North East	4.5%	6.2%	3.7%	0.6%	0.0%	0.9%	0.0%	5.0%
Zone 3 - Enfield South East	0.9%	0.0%	22.4%	0.0%	0.0%	1.5%	0.0%	5.0%
Zone 4 - Enfield South West	9.9%	6.4%	13.0%	47.2%	9.2%	6.3%	0.8%	5.0%
LB Enfield Total	64.9%	70.5%	68.5%	60.2%	28.7%	18.5%	5.7%	
Other	35.1%	29.5%	31.5%	39.8%	71.3%	81.5%	94.3%	n/a
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	n/a

Source: NEMS Household Survey March 2014 and Lichfield adjustments

Table 5: Base year 2019 food and beverage expenditure patterns (£m)

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	% Inflow	Total
Expenditure 2019	89.97	88.33	91.90	173.24	103.49	118.07	83.04		748.04
Enfield Town	42.47	51.14	26.56	17.15	11.28	11.10	4.07	8.62	172.38
Zone 1 - Enfield North West	2.16	0.00	0.46	4.33	8.90	0.47	0.00	0.86	17.18
Zone 2 - Enfield North East	4.05	5.48	3.40	1.04	0.00	1.06	0.00	0.79	15.82
Zone 3 - Enfield South East	0.81	0.00	20.58	0.00	0.00	1.77	0.00	1.22	24.38
Zone 4 - Enfield South West	8.91	5.65	11.95	81.77	9.52	7.44	0.66	6.63	132.53
LB Enfield Total	58.39	62.27	62.95	104.29	29.70	21.84	4.73	18.11	362.30
Other	31.58	26.06	28.95	68.95	73.79	96.23	78.30	n/a	425.11
TOTAL	89.97	88.33	91.90	173.24	103.49	118.07	83.04	n/a	787.41

Source: Table 3 and 4

Table 6: Future 2025 food and beverage expenditure patterns (£m)

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	% Inflow	Total
Expenditure 2025	87.60	83.19	94.96	163.69	98.52	119.27	81.23		728.46
Enfield Town	41.35	48.17	27.44	16.21	10.74	11.21	3.98	8.37	167.47
Zone 1 - Enfield North West	2.10	0.00	0.47	4.09	8.47	0.48	0.00	0.82	16.44
Zone 2 - Enfield North East	3.94	5.16	3.51	0.98	0.00	1.07	0.00	0.77	15.44
Zone 3 - Enfield South East	0.79	0.00	21.27	0.00	0.00	1.79	0.00	1.26	25.10
Zone 4 - Enfield South West	8.67	5.32	12.35	77.26	9.06	7.51	0.65	6.36	127.19
LB Enfield Total	56.85	58.65	65.05	98.54	28.28	22.07	4.63	17.58	351.65
Other	30.75	24.54	29.91	65.15	70.25	97.21	76.60	n/a	415.16
TOTAL	87.60	83.19	94.96	163.69	98.52	119.27	81.23	n/a	766.80

Source: Table 3 and 4

Table 7: Future 2030 food and beverage expenditure patterns (£m)

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	% Inflow	Total
Expenditure 2030	94.03	91.17	111.99	177.52	109.05	134.67	91.05		809.48
Enfield Town	44.38	52.79	32.36	17.57	11.89	12.66	4.46	9.27	185.38
Zone 1 - Enfield North West	2.26	0.00	0.56	4.44	9.38	0.54	0.00	0.90	18.08
Zone 2 - Enfield North East	4.23	5.65	4.14	1.07	0.00	1.21	0.00	0.86	17.16
Zone 3 - Enfield South East	0.85	0.00	25.09	0.00	0.00	2.02	0.00	1.47	29.42
Zone 4 - Enfield South West	9.31	5.83	14.56	83.79	10.03	8.48	0.73	6.99	139.72
LB Enfield Total	61.03	64.27	76.71	106.86	31.30	24.91	5.19	19.49	389.77
Other	33.00	26.90	35.28	70.65	77.75	109.76	85.86	n/a	462.31
TOTAL	94.03	91.17	111.99	177.52	109.05	134.67	91.05	n/a	852.08

Source: Table 3 and 4

Table 8: Future 2035 food and beverage expenditure patterns (£m)

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	% Inflow	Total
Expenditure 2035	98.00	95.98	117.74	187.09	117.97	144.90	96.33		858.01
Enfield Town	46.26	55.57	34.03	18.52	12.86	13.62	4.72	9.77	195.34
Zone 1 - Enfield North West	2.35	0.00	0.59	4.68	10.15	0.58	0.00	0.97	19.31
Zone 2 - Enfield North East	4.41	5.95	4.36	1.12	0.00	1.30	0.00	0.90	18.05
Zone 3 - Enfield South East	0.88	0.00	26.37	0.00	0.00	2.17	0.00	1.55	30.98
Zone 4 - Enfield South West	9.70	6.14	15.31	88.31	10.85	9.13	0.77	7.38	147.59
LB Enfield Total	63.60	67.66	80.65	112.63	33.86	26.81	5.49	20.56	411.27
Other	34.40	28.31	37.09	74.46	84.11	118.09	90.84	n/a	491.90
TOTAL	98.00	95.98	117.74	187.09	117.97	144.90	96.33	n/a	903.17

Source: Table 3 and 4

Table 9: Future 2040 food and beverage expenditure patterns (£m)

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	% Inflow	Total
Expenditure 2040	104.03	102.29	124.76	200.51	125.58	154.67	101.78		913.62
Enfield Town	49.10	59.23	36.05	19.85	13.69	14.54	4.99	10.39	207.84
Zone 1 - Enfield North West	2.50	0.00	0.62	5.01	10.80	0.62	0.00	1.03	20.58
Zone 2 - Enfield North East	4.68	6.34	4.62	1.20	0.00	1.39	0.00	0.96	19.19
Zone 3 - Enfield South East	0.94	0.00	27.95	0.00	0.00	2.32	0.00	1.64	32.84
Zone 4 - Enfield South West	10.30	6.55	16.22	94.64	11.55	9.74	0.81	7.89	157.70
LB Enfield Total	67.52	72.12	85.46	120.71	36.04	28.61	5.80	21.91	438.16
Other	36.51	30.18	39.30	79.80	89.54	126.06	95.97	n/a	523.54
TOTAL	104.03	102.29	124.76	200.51	125.58	154.67	101.78	n/a	961.71

Source: Table 3 and 4

Table 10: Summary of food and beverage expenditure (£M)

Area	2019	2025	2030	2035	2040
Available expenditure in LB Enfield (£m)					
Enfield Town	172.38	167.47	185.38	195.34	207.84
Zone 1 - Enfield North West	17.18	16.44	18.08	19.31	20.58
Zone 2 - Enfield North East	15.82	15.44	17.16	18.05	19.19
Zone 3 - Enfield South East	24.38	25.10	29.42	30.98	32.84
Zone 4 - Enfield South West	132.53	127.19	139.72	147.59	157.70
Total	362.30	351.65	389.77	411.27	438.16
Turnover of existing facilities (£m)					
Enfield Town	172.38	172.38	181.18	190.42	200.13
Zone 1 - Enfield North West	17.18	17.18	18.06	18.98	19.95
Zone 2 - Enfield North East	15.82	15.82	16.63	17.47	18.36
Zone 3 - Enfield South East	24.38	24.38	25.63	26.94	28.31
Zone 4 - Enfield South West	132.53	132.53	139.29	146.39	153.86
Total	362.30	362.30	380.78	400.20	420.62
Surplus/deficit expenditure (£m)					
Enfield Town	0.00	-4.92	4.21	4.92	7.71
Zone 1 - Enfield North West	0.00	-0.74	0.02	0.33	0.63
Zone 2 - Enfield North East	0.00	-0.38	0.54	0.57	0.83
Zone 3 - Enfield South East	0.00	0.72	3.79	4.04	4.53
Zone 4 - Enfield South West	0.00	-5.34	0.43	1.20	3.84
Total	0.00	-10.65	8.99	11.06	17.55

Source: Tables 5 to 9

Table 11: Food and beverage floorspace capacity 2019 to 2040

Area	2019	2025	2030	2035	2040
Turnover density new floorspace (£ psm gross)	5,000	5,000	5,255	5,523	5,805
Floorspace capacity (sq.m gross)					
Enfield Town	0	-983	800	891	1,328
Zone 1 - Enfield North West	0	-148	3	60	109
Zone 2 - Enfield North East	0	-75	102	104	143
Zone 3 - Enfield South East	0	144	722	732	781
Zone 4 - Enfield South West	0	-1,068	83	217	662
Total	0	-2,130	1,711	2,003	3,023

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