

c p w planning



Town Centre Healthchecks and Boundary Reviews

prepared for

London Borough of Enfield

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1. Introduction

Purpose of the study

- 1.1 CPW Planning has been commissioned by the London Borough of Enfield ('the Council') to undertake town centre healthchecks and boundary reviews for the Borough's Major Centre (Enfield Town) and District Centres (Angel Edmonton, Edmonton Green, Southgate and Palmers Green).
- 1.2 The study provides the evidence base to assist the Council with its work on the town centre policies of the emerging Local Plan¹ and to support the Council's development management function. It has been prepared in accordance with the National Planning Policy Framework ('NPPF') (July 2021) and the *Town centres and retail* section of the Planning Practice Guidance ('PPG') (as updated on 18 September 2020).
- 1.3 The study has been prepared in the context of recent significant events including the Covid-19 pandemic and the Government's changes to the Use Classes Order ('UCO') effective since 1 September 2020, and has regard to the soon to be finalised *Retail and Leisure Study: Updated Needs Assessment* prepared by Lichfields ('Needs Assessment').

Report structure

- 1.4 The remainder of this report contains two sections: Town Centre Healthchecks (section 1) and Town Centre Boundary Reviews (section 2). These should be read in conjunction with the appendices.

¹ *Main issues and preferred approaches* (Regulation 18) consultation version of the Enfield Local Plan was published in June 2021.

2. Town Centre Healthchecks

- 2.1 This section focuses on our healthcheck assessment of the Borough's town centres, namely:
- Major Centre – Enfield Town; and
 - District Centres – Angel Edmonton, Edmonton Green, Southgate and Palmers Green.
- 2.2 We have undertaken audits of each centre (based on the performance indicators set out under paragraph 006 of the PPG) informed by our own 'on foot' surveys and various sources of data, including:
- i. Experian Goad surveys updated by CPW Planning on 28 April 2021 (for Enfield Town and Palmers Green), 8 May 2021 (for Angel Edmonton and Southgate) and 26 May 2021 (for Edmonton Green);
 - ii. the outputs from the Reopening High Streets Safely Fund (RHSSF) monitoring carried out by CPW Planning in January and April 2021;
 - iii. the outputs from the Welcome Back Fund (WBF) monitoring carried out by CPW Planning in October 2021;
 - iv. the retail appraisals carried out by the Retail Group for Enfield Town (2017) and Palmers Green (2018); and
 - v. other information supplied by the Council and its partners.
- 2.3 The updated Experian Goad surveys are included at **Appendix 1** and show the distribution of existing use categories in each centre.
- 2.4 The full healthcheck audits are included at **Appendix 2**. These provide a basis for assessing the vitality and viability of each centre and should be read alongside the SWOT analysis presented later in this section.
- 2.5 In the first instance, we make some important observations in relation to:
- Covid-19;
 - National average vacancy levels; and
 - National retail trends.

Covid-19

- 2.6 The Borough's town centres have been subject to extensive trading and social-distancing restrictions since the Covid-19 outbreak in early 2020. This public health emergency has resulted in three Government-enforced 'lockdowns' allowing only essential shops and businesses² to remain open.
- 2.7 All shops and other businesses such as hairdressers, gyms, libraries, pubs and restaurants (for outdoor dining only) have been allowed to reopen since 12 April 2021³.
- 2.8 Set against this context, the Council and CPW Planning took the decision to postpone the survey work for the healthcheck audits until the end of April 2021 (i.e. following the reopening of the majority of shops and businesses on 12 April 2021) to avoid misrepresenting important

² Including food shops, newsagents, banks, DIY and garden centres.

³ Further restrictions, including on indoor hospitality (e.g. cinemas, pubs and restaurants), were lifted on 17 May 2021.

performance indicators including but not limited to a centre's composition of uses, vacancy levels and pedestrian flows.

- 2.9 We are therefore confident that the healthcheck audits have been prepared at the appropriate time (within the limitations of the significant challenges caused by the pandemic) and can be relied upon as a robust evidence base for the emerging Local Plan. However, given the pace of change in the retail and leisure sectors and the implications for town centres, the audits should be reviewed regularly.
- 2.10 For clarification, where the healthcheck audits consider a centre's composition of uses, we have provided information on the total number of vacant units as well as the number of closures by use category. The former are believed to be genuinely vacant (i.e. not occupied), whereas the units identified by CPW Planning as 'closed' are assumed to be temporary closures for reasons relating to the Covid-19 pandemic. It is impossible to predict the extent to which the temporary closures may reopen at some point in the future, but we consider this additional layer of analysis is helpful in the unprecedented circumstances facing the Borough's town centres.

National average vacancy levels

- 2.11 The Needs Assessment sets out that *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.*
- 2.12 The latest data published by the Local Data Company indicates that the UK average shop vacancy rate increased to 14.5% in the second quarter of 2021.
- 2.13 It is important to note that national average vacancy levels include purpose-built shopping centres and town centres ranging from the largest city centre locations to much smaller district and local centres, and should therefore be understood in that context when comparing the vacancy levels reported for each of the Borough's town centres (as follows)⁴:
- Enfield Town – 8.8%
 - Angel Edmonton – 4.4%
 - Edmonton Green – 2.9%
 - Southgate – 4.3%
 - Palmers Green – 4.4%

National retail trends

- 2.14 A review of national retail trends is beyond the scope of this study but there are some important trends to consider when reviewing the healthcheck audits and (in particular) the analysis of each centre's retailer representation.
- 2.15 Many comparison goods retailers are continuing to 'right-size' their store portfolios as they increasingly focus on a smaller number of prime locations (often referred to as 'polarisation') where they can have flagship-type stores and serve wide catchments. This is not a new trend but is accelerating as Covid-19 and consumer behaviour shifts have forced retailers to

⁴ Vacancy levels derived from the Welcome Back Fund monitoring carried out by CPW Planning in October 2021.

consolidate, invest more and more in digital platforms and/or space-share with other occupiers.

- 2.16 The scale of retailer administrations and company voluntary arrangements (CVAs) is a further significant trend, resulting in permanent store closures largely, but not exclusively, focused on the clothing and fashion sector (i.e. those comparison goods retailers most directly affected by the Covid-19 pandemic)⁵.
- 2.17 These trends are likely to reduce and/or change the nature of demand for physical space in the Borough's town centres⁶ and are especially relevant to Enfield Town, given its greater exposure to multiple fashion-orientated retailers. We consider this further under the SWOT analysis below.

⁵ Retailers that have fallen into administration or announced plans for permanent store closures since the Covid-19 outbreak include Arcadia (i.e. major brands such as Topshop, Topman, Miss Selfridge, Dorothy Perkins and Burton), Laura Ashley, Debenhams, Oasis, Warehouse, Cath Kidston, TM Lewin, Ann Summers, Office Shoes, Clarks, Quiz, Monsoon and New Look.

⁶ Most retailers no longer publish their store requirements and therefore it has not been possible to identify 'intentions to change representation' as sought under paragraph 006 of the PPG.

SWOT analysis: Enfield Town

Strengths	Weaknesses
<p>Strong recovery from the pandemic-induced closure of all ‘non-essential’ shops and businesses (comparing a temporary closure rate of 70% in January 2021 with about 6% in October 2021).</p> <p>Major national retailers (including M&S, Next and Waitrose) and the Pearsons department store anchor the centre’s core shopping area comprising Palace Exchange and Palace Gardens.</p> <p>Good selection of other comparison goods retailers (focused on the ‘mass market’ and value-based end of the market).</p> <p>The heritage of Market Place and its outdoor market, providing a focal point close to the centre’s main shopping attractions.</p> <p>Library Green provides a good quality greenspace.</p> <p>Good public transport connectivity to locations throughout the Borough and wider London: the centre is served by bus routes and Overground (Enfield Town) and rail (Enfield Chase) services.</p> <p>Adequate and convenient car parking (including the large, pay-on-exit Palace Gardens multi-storey car park).</p> <p>Pedestrianised shopping environment at Palace Exchange and Palace Gardens.</p>	<p>Poor arrival points into the centre by road owing to a lack of environmental quality (e.g. vacant units, poorly maintained shop fronts, absence of good quality landmarks).</p> <p>Relatively high vacancy levels (10.4% as a proportion of the total number of units – the highest amongst the Borough’s town centres).</p> <p>The dark and dated shopping environment at Palace Gardens is compounded by the substantial cluster of vacant units at its eastern end (though the shopping centre is currently the subject of redevelopment proposals).</p> <p>Further prominent voids at the Silver Street / London Road junction.</p> <p>Limited commercial leisure and restaurant offer for a centre of its size and status.</p> <p>Lack of higher-end comparison goods retailing.</p> <p>The high volumes of traffic circling the centre’s gyratory have a harmful impact on environmental quality.</p> <p>The substantial walking distance between the edge-of-centre Tesco supermarket and the core shopping area limits the propensity of shoppers to undertake linked-trips.</p>
Opportunities	Threats
<p>Diversify and strengthen the non-retail offer in the context of national retail trends and Enfield Town’s declining need for comparison retail floorspace (as identified in the Needs Assessment).</p> <p>Emerging development proposals for Palace Gardens provide an opportunity to address the shopping environment and increase the residential population.</p> <p>The potential release of the Civic Centre site for residential-led development, further increasing the centre’s population and thus expenditure available to support shops and other local businesses.</p> <p>Council role in stimulating place-based improvements (e.g. through the Healthy Streets initiative).</p> <p>Create ‘meanwhile use’ space during town centre redevelopments to diversify activity and introduce new concepts.</p> <p>Seek improvements to the evening economy, including the centre’s commercial leisure and restaurant offer.</p> <p>Topshop void providing a potential opportunity for a temporary leisure attraction (e.g. pop-up cinema) and/or food hall.</p> <p>Build and sustain an improved cultural offer, building on the presence of the Dugdale Centre.</p> <p>Greater promotion of Market Place as a focal point for live entertainment and other cultural events.</p> <p>Better utilising the Library Green for events.</p> <p>Improved signage and wayfinding from the stations towards the centre’s main attractions.</p>	<p>Failing to provide an all-round offer and experience for consumers (beyond just a place to shop not least because there are better shopping and multi-purpose destinations within reach).</p> <p>Competition from stronger ‘destination’ centres (e.g. Brent Cross, London’s West End), nearby out-of-town retail parks (e.g. Enfield Retail Park) along the A10, and the internet including online-only brands (e.g. Topshop).</p> <p>Enfield Town comprises one-third multiples and its retail offer is underpinned by 18 of the 26 ‘major retailers’ – it is particularly exposed to (and therefore at risk from) fashion-orientated retail which is a sector with a reducing store footprint.</p> <p>New developments failing to address the current deficiencies in Enfield Town’s non-retail offer (e.g. the evening economy).</p> <p>Decline in office workers at the Civic Centre and Metaswitch having implications for town centre footfall and spending – a trend which is likely to continue because of (a) the pandemic-induced shift to home or hybrid working and (b) the proposed allocation of the Civic Centre site for residential-led development.</p> <p>Rising vacancy levels having a negative impact on investor confidence and on the overall health of the centre.</p>

SWOT analysis: Angel Edmonton

Strengths	Weaknesses
<p>Strong localised function with a diverse mix of shops and services.</p> <p>High proportion of independent businesses (about 90%), providing a distinguished and relevant offer for the local demographic.</p> <p>High proportion of ‘essential’ convenience goods shops and other businesses, evidenced by a relatively low temporary closure rate of just 43% during the January 2021 lockdown (the lowest recorded across the Borough’s town centres). The temporary closure rate fell to about 8% in October 2021.</p> <p>A strong retail anchor and footfall-generator in the form of Lidl, which is centrally located and provides the centre’s main car park.</p> <p>Low overall vacancy levels.</p> <p>Local business ownerships and the lack of multiple retailers provide a degree of ‘shielding’ against national retail trends (e.g. retailer downsizing).</p> <p>Fore Street Library is an important community facility and supports wider activity in the centre.</p> <p>Good levels of accessibility by public transport (i.e. bus routes and the Overground from Silver Street).</p> <p>Good connectivity to the road network (North Circular and the A10 central corridor).</p>	<p>A relatively poor sense of place: the environment is dominated by traffic congestion and pollution along Fore Street and the North Circular.</p> <p>Lack of focal point and spaces to dwell.</p> <p>The long length of Fore Street, which is dissected by the North Circular and serves to create (at least psychologically) a centre of two-halves.</p> <p>There are some narrow pavements which, adjacent to the heavily trafficked Fore Street, make the pedestrian environment less than welcoming.</p> <p>Limited diversity of restaurants and other leisure and entertainment facilities.</p> <p>Several shop fronts on either side of Fore Street (notably south of the North Circular) are poorly maintained.</p>
Opportunities	Threats
<p>Improve the public realm and introduce more green infrastructure (e.g. street planting).</p> <p>Utilising the Council-owned properties to curate and improve the area.</p> <p>Regeneration proposals for Joyce Avenue and Snells Park (opportunities for new greenspaces and a community more engaged with Angel Edmonton).</p> <p>Secure pedestrian connectivity improvements between the centre and the Overground station (Silver Green) to encourage usage and enhance the perception of safety.</p> <p>The proximity of Pymmes Park.</p> <p>Use the wide pavement close to Fore Street Library for pop-up stalls, events and other local marketing initiatives.</p>	<p>Need to ensure new developments and regeneration proposals complement and connect well (physically and branding-wise) with the existing centre.</p> <p>Lack of a coherent shopping and evening economy offer.</p> <p>Risk that traffic congestion and pollution deter potential consumers from using the centre.</p> <p>Competition from nearby centres including Edmonton Green to the north also along Fore Street.</p>

SWOT analysis: Edmonton Green

Strengths	Weaknesses
<p>A vibrant centre with a diverse retail offer that is relevant to the local demographic.</p> <p>Strong recovery from the pandemic-induced closure of all 'non-essential' shops and businesses: the October 2021 temporary closure rate of less than 5% compares with the 58% recorded in January 2021.</p> <p>Predominantly an enclosed, pedestrianised shopping environment (the purpose-built Edmonton Green Shopping Centre including Indoor Market) with seating, planters and other shopper facilities including toilets and Shop Mobility.</p> <p>Strong supermarket anchors (Asda and Lidl).</p> <p>The Indoor Market has a variety of stalls which help to differentiate the retail offer and provide an added attraction for consumers.</p> <p>Several community facilities including a leisure centre, library and careers/education centres.</p> <p>Strong public transport connections with Overground and rail services and a well-integrated bus station, close to the centre's main shopping attractions.</p> <p>Low overall vacancy levels.</p> <p>Play area for children (northern end of the Shopping Centre).</p>	<p>Car dependency (evidenced by the high take-up of the centre's significant amount of car parking).</p> <p>Lack of residential and office-worker populations within the centre.</p> <p>Shopping Centre relatively disconnected from the surrounding area, including the shops and other businesses to the west of Fore Street.</p> <p>The centre has a very limited financial and professional services function.</p> <p>Limited evening economy.</p>
Opportunities	Threats
<p>Increase the residential population and thus spending available to support local shops and services (e.g. through the emerging development proposals for Edmonton Green Shopping Centre).</p> <p>The new Jobcentre Plus (occupying the former Peacocks unit) providing a good non-retail anchor to support other businesses at the northern end of the Shopping Centre.</p> <p>Railway arches providing 'meanwhile use' options (e.g. maker space) and better utilising the adjacent greenspace for pop-up events.</p>	<p>Need to ensure new development addresses the centre's lack of connectivity with the surrounding area.</p> <p>Losing the affordability of the Shopping Centre's retail offer due to new development and/or asset management strategy.</p> <p>Some of the centre's larger units are occupied by multiple comparison goods retailers that may be 'right-sizing' and evaluating their future store requirements.</p> <p>Competition from nearby out-of-town retail parks (e.g. Enfield Retail Park) and solus retail warehouses along the A10 to the north.</p>

SWOT analysis: Southgate

Strengths	Weaknesses
<p>A strong sense of place around the Underground/bus stations with the listed, Art Deco design style buildings.</p> <p>Underground station (Piccadilly line) and public transport connectivity.</p> <p>The centre is 'bookended' by strong retail anchors: Asda and M&S Simply Food.</p> <p>High proportion of independent shops and other businesses (about 88%) in addition to a strong service-orientated offer (e.g. hairdressers, beauty salons, opticians) which, together, should help the centre to defend against the threat of retailer downsizing and online spending.</p> <p>Turkish, Indian and Mediterranean food themed restaurants provide a strong differential to the centre's modest range of 'branded' restaurants and cafes.</p> <p>Relatively low vacancy levels.</p> <p>Nearby offices provide a good level of lunchtime trade.</p>	<p>The high volumes of traffic along Chase Side and at the Southgate Circus roundabout have a harmful impact on the centre's environmental quality.</p> <p>Relatively poor cycling infrastructure (i.e. no dedicated cycle lanes).</p> <p>Lack of free and/or flexible on-street parking to encourage through-traffic to stop and spend locally.</p> <p>Strong reliance on Asda and M&S Simply Food – at the far edges of the centre – for main food shopping trips.</p> <p>Limited range of leisure and entertainment attractions.</p>
Opportunities	Threats
<p>The re-use of prominent vacant units and under-utilised land between the Underground/bus stations and the police station, to create active frontages and improve the sense of arrival into the high street (Chase Side) from the west.</p> <p>Bring the police station building into a more beneficial use considering its scale and central location (e.g. temporary workspace, community hub).</p> <p>Improve the public realm (including greenspace and seating) close to the Underground/bus stations and along Chase Side.</p> <p>Promote temporary food pop-ups and events along secondary streets (e.g. Crown Lane) to generate a sense of community and enhance the evening economy.</p>	<p>Changes in working patterns (e.g. work-from-home) and the implications for usage of the Underground/bus stations and associated commuter spending.</p> <p>The loss of office space including through permitted development rights.</p> <p>Traffic layout and flows.</p> <p>Competition from nearby centres.</p>

SWOT analysis: Palmers Green

Strengths	Weaknesses
<p>A strong sense of place with a long, linear high street (Green Lanes) and The Triangle as a focal point.</p> <p>Generally clean and well-maintained streetscape with wide pavements.</p> <p>A very 'local' high street with a substantial walk-in catchment from surrounding residential areas.</p> <p>Good representation by convenience goods shops and stores (both multiples and independents) to meet the day-to-day as well as 'main food' shopping needs of the local community.</p> <p>Specialist patisseries and bakeries provide a good differential in respect of the convenience goods offer.</p> <p>Good selection of international food themed restaurants.</p> <p>Strong financial and professional services function.</p> <p>Footfall appears to be recovering well post-lockdown (e.g. footfall levels recorded in October 2021 are approximately double January 2021 levels outside 305-313 Green Lanes).</p> <p>Palmers Green rail station and the footfall and expenditure generated by commuters, which helps to sustain local shops and services.</p> <p>Dedicated cycle lanes running the length of Green Lanes provide good levels of connectivity to the north and south.</p> <p>The proximity of Broomfield Park.</p> <p>Low overall vacancy levels.</p>	<p>The length of Green Lanes resulting in a dispersed shopping environment and multiple road crossings.</p> <p>The concentration of vacant units in the heart of the main shopping area (i.e. eastern side of Green Lanes close to The Triangle).</p> <p>Lack of free and/or flexible on-street parking to encourage through-traffic to stop and spend locally.</p> <p>The centre's main car park (Morrisons) is slightly detached from the wider centre.</p> <p>A relatively limited comparison goods offer.</p> <p>High levels of traffic (and associated noise) around The Triangle detract from the environmental quality of this shopping area.</p> <p>Lack of street planting and other green infrastructure.</p>
Opportunities	Threats
<p>The re-use of prominent vacant units to create new attractions and stimulate wider activity in the centre.</p> <p>Improved marketing of the centre and opportunities for local events and activities, to enhance 'dwell time' and spending by the large residential community.</p> <p>New residential-led development (such as One Fox Lane with 54 apartments) increasing the centre's population.</p> <p>The introduction of local office hubs and workstations to respond to remote-working and/or more localised working habits.</p> <p>Take proactive steps to preserve and enhance the historic environment to support positive placemaking.</p> <p>Improve signage/wayfinding to Broomfield Park and other nearby attractions.</p>	<p>Long-standing prominent vacant units having a detrimental impact on investor confidence and consumer perceptions of the centre.</p> <p>The declining number of multiple comparison goods stores following key closures (e.g. Poundland, Savers, Boots) and the potential impact on footfall levels necessary to support smaller shops and services.</p> <p>Changes in working patterns (e.g. work-from-home) and the implications for usage of Palmers Green rail station and associated commuter spending.</p> <p>Competition from nearby centres.</p>

3. Town Centre Boundary Reviews

3.1 This section reviews the town centre boundaries for Enfield Town, Angel Edmonton, Edmonton Green, Southgate and Palmers Green.

3.2 Annex 2 (Glossary) of the NPPF defines a ‘town centre’ as follows:

Area defined on the local authority’s policies map, including the primary shopping area and areas predominantly occupied by main town centre uses within or adjacent to the primary shopping area.

3.3 The NPPF requires local plans to define the extent of town centres (paragraph 86b) and to keep town centre boundaries under review (paragraph 86d) so that meeting anticipated needs for retail, leisure, office and other main town centre uses – looking at least ten years ahead – is not compromised by limited availability of suitable sites.

3.4 The Needs Assessment contains an up-to-date assessment of the need for town centre floorspace in the London Borough of Enfield. This assessment has informed our review. It identifies limited capacity for additional convenience retail and food/beverage floorspace by 2035 (up to 4,452 sqm gross and 2,003 sqm gross respectively) and forecasts an overall ‘negative’ demand for comparison retail floorspace over the plan period. Paragraph 4.3 of the Needs Assessment comments that *vacant floorspace should help to accommodate residual future growth and not all of the projections [outlined above] will require the development of new floorspace.*

3.5 Against this context, our review provides an evidence base to inform the town centre boundaries for the emerging Local Plan Policies Map and is intended to update the boundaries identified in the Council’s Town Centre Uses and Boundaries Review of March 2013 (‘the 2013 Boundary Review’).

3.6 It is relevant to note that Class E of the amended UCO encompasses many – but not all – main town centre uses as well as some non-main town centre uses (e.g. clinics, health centres, creches). Whilst the new NPPF makes no provision for this change to the UCO, Class E reflects the Government’s intention to support the adaptation of town centres and, therefore, our review considers whether it is appropriate and justified to revise any boundaries to account for this broader range of uses.

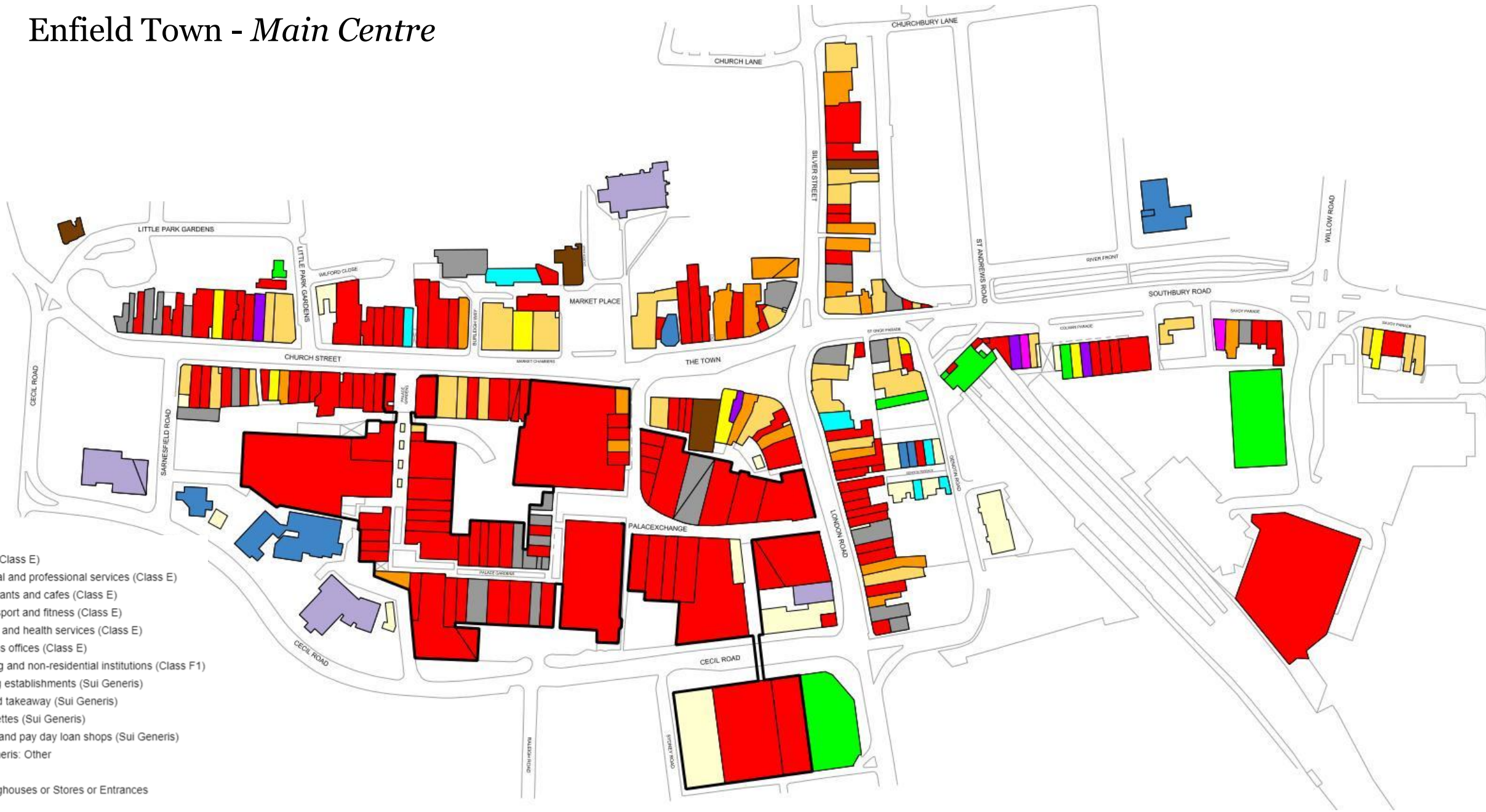
3.7 Thus, using the 2013 Boundary Review as our starting point, we carried out town centre inspections on 28 April 2021 (for Enfield Town and Palmers Green), 8 May 2021 (for Angel Edmonton and Southgate) and 26 May 2021 (for Edmonton Green) in conjunction with our survey work for the healthcheck audits. Factors relevant to the town centre boundary reviews included:

- the location and nature of existing uses within and at the edges of each centre;
- the location of vacant units and their potential for re-use; and
- each centre’s built form and other physical barriers (such as main roads or railway lines).

3.8 The proposed revisions to the town centre boundaries – and a summary of the reasons for any amendments – are included at **Appendix 3**.

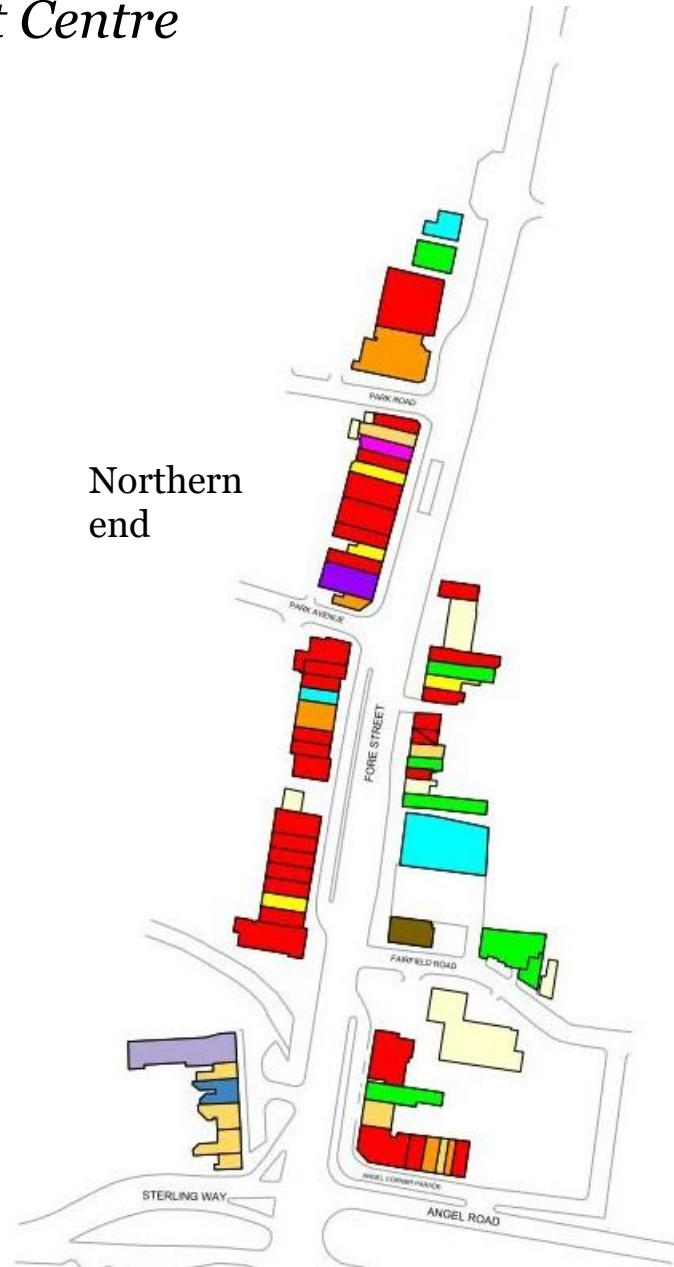
Appendix 1: Existing Use Categories

Enfield Town - Main Centre



Angel Edmonton - District Centre

Northern end



Southern end



Legend

- Shops (Class E)
- Financial and professional services (Class E)
- Restaurants and cafes (Class E)
- Indoor sport and fitness (Class E)
- Medical and health services (Class E)
- Business offices (Class E)
- Learning and non-residential institutions (Class F1)
- Drinking establishments (Sui Generis)
- Hot food takeaway (Sui Generis)
- Laundrettes (Sui Generis)
- Betting and pay day loan shops (Sui Generis)
- Sui Generis: Other
- Vacant
- Dwellinghouses or Stores or Entrances

Edmonton Green - District Centre



Legend

- Shops (Class E)
- Financial and professional services (Class E)
- Restaurants and cafes (Class E)
- Indoor sport and fitness (Class E)
- Medical and health services (Class E)
- Business offices (Class E)
- Learning and non-residential institutions (Class F1)
- Drinking establishments (Sui Generis)
- Hot food takeaway (Sui Generis)
- Laundrettes (Sui Generis)
- Betting and pay day loan shops (Sui Generis)
- Sui Generis: Other
- Vacant
- Dwellinghouses or Stores or Entrances

Southgate - District Centre



- Legend
- Shops (Class E)
 - Financial and professional services (Class E)
 - Restaurants and cafes (Class E)
 - Indoor sport and fitness (Class E)
 - Medical and health services (Class E)
 - Business offices (Class E)
 - Learning and non-residential institutions (Class F1)
 - Drinking establishments (Sui Generis)
 - Hot food takeaway (Sui Generis)
 - Laundrettes (Sui Generis)
 - Betting and pay day loan shops (Sui Generis)
 - Sui Generis: Other
 - Vacant
 - Dwellinghouses or Stores or Entrances

Palmers Green - District Centre

Southern end

Northern end



Legend

- Shops (Class E)
- Financial and professional services (Class E)
- Restaurants and cafes (Class E)
- Indoor sport and fitness (Class E)
- Medical and health services (Class E)
- Business offices (Class E)
- Learning and non-residential institutions (Class F1)
- Drinking establishments (Sui Generis)
- Hot food takeaway (Sui Generis)
- Laundrettes (Sui Generis)
- Betting and pay day loan shops (Sui Generis)
- Sui Generis: Other
- Vacant
- Dwellinghouses or Stores or Entrances

ENFIELD TOWN

Composition of uses:

Table A overleaf sets out the composition of uses (ground floor only) in Enfield Town based on Experian Goad's survey of the centre updated by CPW Planning.

The analysis focuses on several use categories having regard to the changes to the Use Classes Order effective since 1 September 2020. The analysis includes a record of the number of uses, or businesses, closed at the time of our survey (28 April 2021) in the context of pandemic-induced restrictions on 'non-essential' businesses being lifted on 12 April 2021. The proportion of businesses closed on 15 October 2021 is also shown.

The main findings in respect of the centre's composition of uses are:

- Over half of the units (53%) are occupied by shops, followed by financial and professional services (12.9%) and restaurants and cafes (7.6%).
- Of the total number of shops (132):
 - The dominant category is comparison goods (with 84 shops), which is to be expected in a larger centre like Enfield Town. A high proportion of the comparison goods shops are dedicated to clothing and footwear, in addition to other more specialist goods such as jewellery, electricals, and homeware and furniture.
 - There are 29 shops offering retail services such as hairdressers, beauty salons and opticians.
 - The remainder (19 shops) cater for the convenience goods shopping needs of users of the centre and include supermarkets, health food stores, bakeries, off-licenses and grocers.
- Within the financial and professional services category, Enfield Town is particularly well served by banks and recruitment centres.
- For a centre of its size, there are relatively few units occupied by food and beverage operators (i.e. pubs/bars/restaurants).

Table A shows an increasingly encouraging picture across the use categories in terms of the centre's recovery from the Covid-19 pandemic. A high proportion of all shops (about 94%) and financial and professional services (about 94%) have re-opened, while 10% of restaurants and cafes remain closed. Most sui generis uses have re-opened.

Overall, about 6% of all uses currently remain closed which compares well against the 70% 'closure rate' observed by CPW Planning during the national lockdown in January 2021. This closure rate (70%) was the highest recorded across the borough's centres and can, in part, be attributed to Enfield Town's relatively high proportion of comparison goods shops selling clothing and footwear, jewellery, furniture and other 'non-essential' items.

Table A – Composition of uses, Enfield Town

Use Categories	Units (count)	Units (%)	Closed @ 28 April 2021 (count)	Closed @ 28 April 2021 (%)	Closed @ 15 October 2021 (%)
Shops <i>Class E – formerly Class A1</i>	132	53.0	13	9.8	6.2
Financial and professional services <i>Class E – formerly Class A2</i>	32	12.9	4	12.5	6.1
Restaurants and cafes <i>Class E – formerly Class A3</i>	19	7.6	4	21.1	10.0
Indoor sport and fitness <i>Class E – formerly Class D2</i>	-	-	-	-	-
Medical and health services <i>Class E – formerly Class D1</i>	6	2.4	0	0.0	0.0
Business offices <i>Class E – formerly Class B1</i>	6	2.4	2	33.3	0.0
Learning and non-residential institutions <i>Class F1 – formerly Class D1/D2</i>	4	1.6	0	0.0	0.0
Hotels <i>Class C1</i>	-	-	-	-	-
Drinking establishments <i>Sui Generis – formerly Class A4</i>	4	1.6	3	75.0	0.0
Hot food takeaways <i>Sui Generis – formerly Class A5</i>	7	2.8	1	14.3	0.0
Laundrettes <i>Sui Generis</i>	2	0.8	0	0.0	50.0
Betting and pay day loan shops <i>Sui Generis</i>	4	1.6	0	0.0	0.0
Sui Generis: Other	7	2.8	2	28.6	0.0
Vacant	26	10.4	-	-	-
TOTAL	249	100.0	29	13.0	6.1

Source:

Experian Goad survey updated by CPW Planning (28 April 2021).

More recent survey data (15 October 2021) derived from Welcome Back Fund monitoring.

Notes:

Vacant units identified are believed to be genuinely vacant, whereas the ‘closed’ units are assumed to be temporary closures for reasons relating to the Covid-19 pandemic.

Percentage of total units identified as ‘closed’ excludes vacant units.

Vacancy levels:

As shown in Table A above, our April 2021 survey identified 26 vacant units in Enfield Town. This equates to a vacancy rate of 10.4% (as a proportion of the total number of units) which, whilst remaining below average levels, is a performance indicator of growing concern in the context of retail market trends and conditions.

Key reasons for the centre’s vacancy levels are likely to include the national trend of retailer ‘downsizing’ to fewer prime locations and (more specific to Enfield Town) the implications for town centre footfall of the decline in office workers at the Civic Centre and Metaswitch.

In terms of the distribution of the vacant units, the following observations can be made:

- The centre’s largest, most notable vacant unit is the former Topshop unit over two floors (approximately 1,080 square metres gross) at Palace Exchange. This closure follows a recent investment by ASOS to take the Arcadia brands, including Topshop, online-only.
- There is a substantial cluster of vacancies at the eastern end of Palace Gardens, each measuring between 20-140 square metres (gross). It is understood that Palace Gardens is the subject of redevelopment plans, and thus the landlord’s strategy for obtaining vacant possession may be affecting the uptake of these units.
- Other prominent voids can be found at the Silver Street / London Road junction. These include the former Pizza Express unit (220 square metres gross) and the corner unit previously occupied by a bank (170 square metres gross).
- There are also vacant units concentrated towards the more peripheral parts of the centre, at the western end of Church Street (7 units) and the southern end of London Road (3 units).

During our Welcome Back Fund monitoring in October 2021, we recorded 22 vacant units (a vacancy rate of circa 8.8% considering the total number of units shown in Table A), indicating a small improvement since the easing of pandemic-induced restrictions.

Retailer representation and the balance between independent and multiple stores:

Enfield Town includes 18 of the 26 ‘major retailers’ defined by Experian Goad, as shown in Table B below. Notable gaps in this list include Argos, Primark and Wilko.

Table B – Major retailers, Enfield Town

Department stores	Mixed goods retailers	Clothing retailers	Other comparison goods retailers	Supermarkets
Marks & Spencer	Boots TK Maxx WH Smith	H&M Monsoon New Look Next River Island	Clarks Clintons EE O2 Superdrug Vodafone Waterstones	Tesco Waitrose

Source:
Experian Goad (list updated by CPW Planning based on 28 April 2021 survey).

Most of these major retailers are focused within Palace Exchange and Palace Gardens which, together, create the core shopping area of Enfield Town. In addition to M&S, anchoring these two schemes is the Pearsons department store over three floors. It sells an extensive variety of comparison goods including clothing and footwear, personal luxury goods, electricals, household goods and furniture; and incorporates several branded concessions such as Barbour, Calvin Klein, Joules, Whistles and White Stuff.

Palace Exchange contains a good choice of larger, mainstream fashion-orientated retailers. The current line-up includes Next, H&M, TK Maxx (upper level), New Look and River Island. Further represented here is Poundland, JD Sports, Deichmann and Clarks. As mentioned previously, the former Topshop unit is a notable void.

The adjacent Palace Gardens is the older of the two schemes and is anchored by Waitrose. It further contains a mix of comparison goods retailers (e.g. Boots, Clintons, Monsoon, H&M Kids, Millets, Ann Summers, H Samuel, Robert Dyas, Waterstones), opticians and a Costa Coffee. A new pop-up culture hub – Culture Palace – has recently opened in the unit adjacent to Monsoon.

Church Street / The Town runs east-west to the north of Palace Exchange and Palace Gardens. It accommodates a limited number of multiple stores (e.g. EE, Vodafone, Shoe Zone, Savers) and the majority of the centre's financial services (the banks here include Barclays, Natwest, Santander, Metro Bank, Nationwide and TSB). Independent retailers and service businesses are predominantly focused towards the more peripheral parts of the centre, including along London Road, Silver Street and the western end of Church Street.

Overall, we consider the centre offers a good selection of comparison goods retailers albeit provision is largely underpinned by 'mass market' and value-based retailers. The upper middle / quality end of the market is almost exclusively served by Pearsons' branded concessions.

The food and beverage offer is also relatively limited for a centre of its size, with few restaurant chains (those that exist cater for fast food or casual dining options and include McDonalds, Nando's and Prezzo along The Town). Branded coffee shops include the Costa Coffee, Café Nero and Muffin Break; while M&S and Pearsons incorporate restaurants/cafes. Wider provision within the centre includes a number of independent restaurants and cafes, and hot food takeaways.

In terms of convenience goods provision, Enfield Town is well served by the large Tesco Extra supermarket to the east of the centre while (as mentioned) Waitrose anchors Palace Gardens. Other supermarket chains include Iceland and Lidl to the south of Palace Exchange (Cecil Road). There is also a Holland & Barrett health food store (Palace Gardens) and several smaller, mainly independent convenience goods shops such as bakeries, off-licenses and grocers.

Market Place has an outdoor market with stalls offering fresh produce, international street food, and homemade and specialist goods. It further hosts live entertainment and a programme of events.

Overall, almost one-third of the total number of units (excluding vacant units) are occupied by multiples.

Customers' experience and behaviour:

There is no up-to-date survey evidence relating to customers' experience and behaviour.

The Retail Group's healthcheck of Enfield Town (October 2017) includes a *Street Survey* and we summarise below the key findings relevant to the centre's attractiveness.

- Shopping is respondents' primary reason for visiting Enfield Town. Other main reasons include live and/or work nearby; and to use service facilities such as banks and hairdressers.
- Over 60% of respondents typically visit the centre at least once a week, with 17% visiting daily, therefore indicating a high frequency of visit.
- In terms of areas for improvement, respondents' main suggestions include more and/or better shops and brands; more independent stores; and more restaurants and cafes (a third of respondents did not cite any improvements).
- Key improvements that would make respondents visit Enfield Town more often are *fill empty units; more variety of shops; cheaper / free parking; and something for kids.*

Pedestrian flows:

During our inspections, we observed the highest levels of footfall within the core shopping area focused on Palace Exchange and Palace Gardens (i.e. close to the main retail attractions and the pedestrian entrances to the Palace Gardens multi-storey car park). Pedestrian flows were also relatively strong along Church Street between the northern entrances to Palace Exchange (opposite Market Square) and Palace Gardens (opposite the post office) respectively. The bus stops along this thoroughfare appeared to generate high levels of activity.

Footfall tailed off towards the more peripheral areas of the centre, where there is reduced quality in the retail offer and fewer non-retail attractions. Pedestrian flows towards and in proximity to the Overground station were also relatively modest.

Table C below sets out the footfall counts recorded by CPW Planning during 2021, as of 25 January (during the Government-enforced lockdown) in addition to 28 April and 15 October. This monitoring was focused on two locations at either end of Church Street / The Town. It indicates that footfall levels have steadily increased outside Pearsons (The Town) following the re-opening of ‘non-essential’ shops and businesses; however, the picture is more mixed at the western end of the centre (Church Street) where there are fewer retail attractions.

Table C – Footfall counts, Enfield Town

Location – Pavement outside Pearsons, 11 The Town	
25 January 2021 (13:44 to 14:44)	
Footfall counts in direction of East:	Footfall counts in direction of West:
148	116
28 April 2021 (14:45 to 15:45)	
Footfall counts in direction of East:	Footfall counts in direction of West:
157	179
15 October 2021 (16:26 to 17:26)	
Footfall counts in direction of East:	Footfall counts in direction of West:
183	207

Location – Pavement outside Value 4 Money, 47-49 Church Street	
25 January 2021 (15:05 to 16:05)	
Footfall counts in direction of East:	Footfall counts in direction of West:
64	120
28 April 2021 (12:50 to 13:50)	
Footfall counts in direction of East:	Footfall counts in direction of West:
136	117
15 October 2021 (15:02 to 16:02)	
Footfall counts in direction of East:	Footfall counts in direction of West:
125	102

Source:

CPW Planning (monitoring for the purposes of the Reopening High Streets Safely Fund and the Welcome Back Fund).

Accessibility:

The centre has a PTAL of 6a indicating excellent access to public transport. It is served by Overground (Enfield Town) and rail (Enfield Chase) services, as well as numerous bus stops throughout the centre including along Church Street (outside the Post Office, Savers and McDonalds); Southbury Road (close to the Overground station); and London Road (outside HSBC). There is also a bus stand at the far western end of the centre, off Little Park Gardens. The extent and distribution of public transport facilities makes it easier for those with mobility issues to access the centre's shops and services.

The pedestrianised areas of Enfield Town include the Palace Exchange and Palace Gardens shopping centres. These comprise the bulk of the centre's key retail attractions and from here, other destinations and attractions (such as the Overground station, Civic Centre and library) are reasonably well signposted and accessible on foot.

Enfield Town's main crossing points are signal controlled with dropped kerbs. These can be found along Church Street / The Town; along London Road; close to the Silver Street / London Road junction; and close to the Southbury Road / Genotin Road junction. There is a zebra crossing adjacent to the Civic Centre (Silver Street). In terms of seating, there is good provision within Palace Exchange and Palace Gardens as well as Library Green and the gardens outside the Civic Centre.

The centre lacks dedicated routes or lanes for cyclists; however, there are cycle storage facilities (off Genotin Road) close to the Overground station as well as cycle hoops at The Town / London Road junction and elsewhere within the centre.

Enfield Town is situated approximately one kilometre to the west of the A10, which runs north towards Hertfordshire and south into London. The main roads serving the centre include the A110 (i.e. Church Street / The Town) and the A105 (i.e. London Road / Silver Street). The largest town centre car park is the Palace Gardens multi-storey car park with 523 spaces (including a good supply of disabled parking bays close to the main pedestrian exits). It is a pay-on-exit car park and centrally located off Sarnesfield Road, and therefore provides convenient parking for visitors to Enfield Town's shops and services. Additional parking and disabled parking provision is available at the Civic Centre, Church Lane, and New River Loop; while there is limited 'pay and display' on-street parking throughout the centre.

Environmental quality:

Palace Exchange comprises an open shopping precinct and is clean and well maintained, with modern lighting, seating and wayfindings. It provides a pleasant shopping environment overall. The pedestrian route through to Palace Gardens is less appealing, however, owing to the substantial cluster of vacant units and the extensive overhangs which (whilst serving to partly cover the Palace Gardens scheme) create a dark shopping environment. The northern entrance to Palace Gardens (off Church Street) is also relatively unappealing and fails to 'sell' the good quality retailer line-up which the scheme accommodates.

Church Street / The Town contains a number of larger units and the shop fronts are generally in a reasonable condition. However, the western end of Church Street – where the pavements are generally narrower – includes several vacant units and poorer quality shop fronts. This has an adverse impact on the sense of arrival from the west. Further east, towards the Silver Street / London Road junction, the pavements widen on The Town's southern side and there is seating and opportunities for outdoor dining associated with the limited mix of food and beverage operators.

Silver Street is a key route into the centre from the north. There are several mature trees, the shop fronts are generally well kept, and the pavements are relatively clutter-free. Further south and east, along London Road and Southbury Road respectively, the quality of the shopping environment tends to deteriorate with some vacancies and/or poorly maintained shop fronts.

Perception of safety:

We identified no significant adverse issues with regards to safety or security during our site inspections, which were conducted during the day.

Whilst the Palace Gardens scheme is somewhat blighted by vacancies at its eastern end and provides a dark shopping environment, it feels relatively safe and secure (helped by the popular footfall-generating retail attractions such as Waitrose). Elsewhere within the wider centre, the shopping streets are generally well activated; although those more peripheral areas with several vacant units are likely to feel less safe after-dark in particular.

Opening hours and the evening economy:

Most shops and services are open all week (with the possible exception of Sundays). The centre's main supermarket, Tesco Extra, is open from 06:00 until midnight, with reduced Sunday trading hours (11:00 to 17:00).

The main shopping centres, Palace Exchange and Palace Gardens, are open from 09:00 to 17:30 excluding 'late night' Thursdays (when some shops trade until 19:00) and Sundays.

Enfield Town's evening economy is relatively modest for a centre of its size; however, the limited pubs/bars/restaurants that exist serve to extend hours of activity into the evening.

Commercial rents:

Table D below identifies the rental levels currently sought in Enfield Town, based on information obtained from commercial property websites.

Table D – Rental levels, Enfield Town

Shop unit	Ground floor area	Annual rent exclusive*
Unit formerly occupied by Topshop, Palace Exchange	490 sqm	[negotiable]
Unit adjacent to Café Nero, Palace Exchange	85 sqm	£80,000
Unit adjacent to Value 4 Money, Church Street	90 sqm	£30,000
Unit at the western end of Church Street	82 sqm	£32,000

Sources:

www.realla.co.uk for Palace Exchange and www.zoopla.co.uk for others (accessed by CPW Planning on 3 August 2021).

Notes:

Annual rent exclusive of business rates and service charges.

Barriers to business investment:

We consider that, of all the borough's centres, Enfield Town is particularly vulnerable to the changes both in the retail sector and in working habits seen over the course of the Covid-19 pandemic. This has the potential to impact on town centre footfall and spending and, consequently, on business investment decisions.

Beyond Covid-19 related impacts, we consider that barriers to new businesses opening and/or existing businesses expanding (that are specific to Enfield Town) are likely to include:

- the greater attractiveness of competing shopping and multi-purpose 'destination' centres (such as Brent Cross and London's West End), which serves to limit Enfield Town's market share and its appeal to consumers and therefore investors;

- the lack of 'critical mass' in relation to the evening / night-time leisure and entertainment offer; and
- the environmental quality of parts of the centre, including the more peripheral areas and key arrival points, could be improved to support future business investment.

ANGEL EDMONTON

Composition of uses:

Table A overleaf sets out the composition of uses (ground floor only) in Angel Edmonton based on Experian Goad's survey of the centre updated by CPW Planning.

The analysis focuses on several use categories having regard to the changes to the Use Classes Order effective since 1 September 2020. The analysis includes a record of the number of uses, or businesses, closed at the time of our survey (8 May 2021) in the context of pandemic-induced restrictions on 'non-essential' businesses being lifted on 12 April 2021. The proportion of businesses closed on 4 October 2021 is also shown.

The main findings in respect of the centre's composition of uses are:

- Half (49.4%) of the units are occupied by shops, followed by financial and professional services (12.7%) and hot food takeaways (9.5%).
- Of the total number of shops (78):
 - Almost half (37) are occupied by retailers of comparison goods including homeware, furniture, mobile phones, clothing and footwear, and charity or second-hand goods.
 - There are 29 convenience goods shops comprising supermarkets, mini-markets, fishmongers, and off-licenses.
 - The remainder (12 shops) are primarily dedicated to retail services such as hairdressers, beauty salons, opticians, and a post office.
- The financial and professional services category is dominated by banks and estate agents.
- The 'other' sui generis uses include taxi businesses, casino/amusement arcades, and a fuel station.

Encouragingly for the centre's ongoing recovery from the Covid-19 pandemic, a high proportion of all shops (about 92%) have re-opened; while all units occupied by financial and professional services, medical and health services, business offices, laundrettes, and betting and pay day loan shops have re-opened. Given the restrictions on indoor gatherings at the time of our May 2021 survey, it is unsurprising that our October 2021 survey identified a lower 'closure rate' amongst restaurants and cafes (30%) and drinking establishments (25%).

Overall, about 8% of all uses currently remain closed compared with about 18% in May 2021 and the 43% observed by CPW Planning during the national lockdown in January 2021. This closure rate (43%) was the lowest recorded across the borough's centres and suggests that Angel Edmonton has a relatively high proportion of 'essential' shops and services.

Table A – Composition of uses, Angel Edmonton

Use Categories	Units (count)	Units (%)	Closed @ 8 May 2021 (count)	Closed @ 8 May 2021 (%)	Closed @ 4 October 2021 (%)
Shops <i>Class E – formerly Class A1</i>	78	49.4	8	10.3	7.5
Financial and professional services <i>Class E – formerly Class A2</i>	20	12.7	3	15.0	0.0
Restaurants and cafes <i>Class E – formerly Class A3</i>	10	6.3	5	50.0	30.0
Indoor sport and fitness <i>Class E – formerly Class D2</i>	-	-	-	-	-
Medical and health services <i>Class E – formerly Class D1</i>	4	2.5	0	0.0	0.0
Business offices <i>Class E – formerly Class B1</i>	1	0.6	0	0.0	0.0
Learning and non-residential institutions <i>Class F1 – formerly Class D1/D2</i>	2	1.3	1	50.0	0.0
Hotels <i>Class C1</i>	-	-	-	-	-
Drinking establishments <i>Sui Generis – formerly Class A4</i>	4	2.5	3	75.0	25.0
Hot food takeaways <i>Sui Generis – formerly Class A5</i>	15	9.5	2	13.3	13.3
Laundrettes <i>Sui Generis</i>	3	1.9	0	0.0	0.0
Betting and pay day loan shops <i>Sui Generis</i>	5	3.2	0	0.0	0.0
Sui Generis: Other	12	7.6	5	41.7	0.0
Vacant	4	2.5	-	-	-
TOTAL	158	100.0	27	17.5	8.1

Source:

Experian Goad survey updated by CPW Planning (8 May 2021).

More recent survey data (4 October 2021) derived from Welcome Back Fund monitoring.

Notes:

Vacant units identified are believed to be genuinely vacant, whereas the ‘closed’ units are assumed to be temporary closures for reasons relating to the Covid-19 pandemic.

Percentage of total units identified as ‘closed’ excludes vacant units.

Vacancy levels:

As shown in Table A above, our May 2021 survey identified four vacant units in Angel Edmonton. This equates to a vacancy rate of just 2.5% (as a proportion of the total number of units) which is well below average levels.

These vacant units were focused along Fore Street within the centre’s southern section (i.e. south of the North Circular), each measuring between 70 and 190 square metres (gross).

During our Welcome Back Fund monitoring in October 2021, we recorded seven vacant units (a vacancy rate of circa 4.4% considering the total number of units shown in Table A).

Retailer representation and the balance between independent and multiple stores:

Angel Edmonton has a strong localised function. It is represented by two national supermarkets: Lidl and Tesco Express. The former is an important ‘anchor’ for the centre, being centrally located (at the North Circular / Fore Street junction) and with free time-limited customer car parking. Meanwhile, the Tesco Express provides a smaller ‘basket shop’ offering to serve the day-to-day needs of local residents and other users of the centre. The centre also contains independent supermarkets, mini-markets and fishmongers.

Multiple comparison goods stores are limited to Poundstretcher, Peacocks and Superdrug; while the most prevalent comparison goods sub-categories available amongst the centre’s many independent stores are homeware and furniture, mobile phones and accessories, and clothing and footwear.

The takeaway chains include Subway, McDonalds, KFC and Pizza Hut; while the centre is served by national banks (i.e. Natwest, Halifax) and betting shops (i.e. William Hill, Paddy Power, Coral). Otherwise, the centre’s retail services are predominantly independent and relevant to the local demographic.

Overall, only about 10% of the total number of units (excluding vacant units) are occupied by multiples.

Customers’ experience and behaviour:

There is no up-to-date survey evidence relating to customers’ experience and behaviour.

Pedestrian flows:

During our inspections of the centre, we observed the highest pedestrian flows within the southern section extending from the North Circular and towards McDonalds and Natwest on the eastern side of Fore Street. We observed some pedestrians undertaking linked-trips between the Lidl supermarket / car park and the centre’s main concentration of shops and services along Fore Street.

The pavements within the centre’s northern section were less busy owing to the relative lack of footfall-generating attractions.

Table B below sets out the footfall counts recorded by CPW Planning during 2021, as of 8 January (during the Government-enforced lockdown) in addition to 30 April and 4 October. This monitoring was focused on a pavement on the western side of Fore Street, outside the library. It shows that post-lockdown footfall has been increasing (albeit only very slightly between January and April) in the direction of north and the centre’s core shopping and services area. Meanwhile, observed footfall levels in the direction of south are higher post-lockdown but fell between April and October.

Table B – Footfall counts, Angel Edmonton

Location – Pavement outside Fore Street Library, 109-111 Fore Street	
8 January 2021 (12:42 to 13:42)	
Footfall counts in direction of South:	Footfall counts in direction of North:
112	128
30 April 2021 (11:38 to 12:38)	
Footfall counts in direction of South:	Footfall counts in direction of North:
160	129
4 October 2021 (11:26 to 12:26)	
Footfall counts in direction of South:	Footfall counts in direction of North:
149	176

Source:

CPW Planning (monitoring for the purposes of the Reopening High Streets Safely Fund and the Welcome Back Fund).

Accessibility:

Angel Edmonton is served by several bus stops and the Overground (Silver Street): the station entrance is located to the west of the centre off Sterling Way. It has a PTAL of 6a indicating excellent access to public transport. However, step-free access to/from the Overground station for those with mobility issues is not available.

The centre's bus stops are well distributed along Fore Street (both north and south of the North Circular). The most popular bus stops appeared to be those located outside Natwest and close to the Fore Street library, as well as the bus stop outside Lidl fronting the North Circular.

Angel Edmonton is accessible on foot from the surrounding residential areas. Some sections of pavement are relatively narrow (notably between College Gardens / Leeds Street and the North Circular) although, at the time of our survey, these were widened with temporary bollards for social-distancing purposes. Reflecting the high volume of traffic movements along Fore Street, there are signal-controlled and dropped kerb crossings close to the North Circular, outside Tesco Express, and (further south) close to the junction with Cowper Road. Fore Street crossing points in the more peripheral parts of the centre comprise dropped kerbs and a central island.

Seating is provided on the wide pavement outside the Fore Street library and at the centre's several bus stops/shelters, but there is a lack of seating elsewhere. Provision is made for cyclists with the limited availability of cycle hoops (e.g. outside Lidl and along Fore Street including opposite the Halifax bank and close to the junction with Alpha Road). There are also dedicated cycle lanes at the northern end of the centre, extending northwards from close to the Fore Street / Park Road junction.

The main road serving Angel Edmonton district centre, Fore Street (A1010), extends north and south from the North Circular (A406). The bulk of the district centre's parking is available at the Lidl car park (time restricted and including six disabled parking bays). During our site inspections, this car park was at approximately 60-70% capacity. There is also a limited amount of 'pay and display' off-street parking along Fore Street.

Environmental quality:

Angel Edmonton is a long, linear centre focused along Fore Street. Traffic congestion (and associated noise) is a dominant characteristic and has a negative impact on the centre's overall environmental quality.

There are some trees and seating on the western side of Fore Street where the pavement widens, close to the Fore Street library and bus stops, while the higher number of trees at the northern end of the centre benefits the environmental quality here.

Whilst shop fronts are generally reasonably maintained, there are several shop fronts with a tired and/or untidy appearance on either side of Fore Street south of the North Circular.

Perception of safety:

We identified no significant adverse issues with regards to safety or security during our site inspections, which were conducted during the day. The main issues relate to busy roads and crossing points; in particular, across the North Circular (A406) which runs between the northern and southern sections of the centre.

Opening hours and the evening economy:

Most shops and services are open all week (with the possible exception of Sundays). The centre's main supermarket, Lidl, is open from 07:00 to 22:00 Monday-Saturday, with reduced Sunday trading hours (11:00 to 17:00).

The centre has a limited number of 'evening economy' uses (e.g. pubs/bars/restaurants).

Commercial rents:

There is no published information about rental levels in Angel Edmonton.

Barriers to business investment:

The current lack of vacant units (four) could be viewed as a barrier in terms of limiting business investment opportunities – particularly for those seeking larger, more flexible and/or more modern units.

Other factors likely to restrict new businesses opening and/or existing businesses expanding (that are specific to Angel Edmonton) include:

- the lack of 'address' resulting from no strong focal point, the poor sense of place and the long length of Fore Street spanning the North Circular; and
- traffic congestion along Fore Street.

EDMONTON GREEN

Composition of uses:

Table A overleaf sets out the composition of uses (ground floor only) in Edmonton Green based on Experian Goad's survey of the centre updated by CPW Planning.

The analysis focuses on several use categories having regard to the changes to the Use Classes Order effective since 1 September 2020. The analysis includes a record of the number of uses, or businesses, closed at the time of our survey (26 May 2021) in the context of pandemic-induced restrictions on 'non-essential' businesses being lifted on 12 April 2021. The proportion of businesses closed on 4 October 2021 is also shown.

The main findings in respect of the centre's composition of uses are:

- Shops are the dominant use category, occupying almost two-thirds (62%) of the total number of units.
- Of the total number of shops (106):
 - Some 61 shops are dedicated to comparison goods retailing such as clothing and footwear, sportswear, jewellery, household goods, furniture, and carpets and flooring.
 - There are 28 convenience goods shops including supermarkets, greengrocers, bakeries, and butchers.
 - Just 17 shops comprise retail services (e.g. opticians, hairdressers, beauty salons).
- Restaurants and cafes (7.6%) and financial and professional services (6.4%) are the next most common use categories, followed by hot food takeaways (5.3%) and 'other' sui generis uses (4.7%).
- Compared to the borough's other centres, Edmonton Green has the fewest and least diverse mix of financial and professional services (i.e. there are just two banks).
- There are two indoor sport and fitness facilities: a leisure centre and a gymnasium.

Edmonton Green is showing signs of a strong recovery since the pandemic-induced closure of all 'non-essential' shops and businesses, with all but one shop (i.e. 99.1% of all shops) trading at the time of our survey in May 2021 before falling slightly to 97.2% in October 2021. A high proportion of service businesses have re-opened including laundrettes, financial and professional services, and restaurants and cafes.

Demonstrating the high degree of re-openings, less than 5% of all uses currently remain closed compared with the 58% 'closure rate' observed by CPW Planning during the national lockdown in January 2021.

Table A – Composition of uses, Edmonton Green

Use Categories	Units (count)	Units (%)	Closed @ 26 May 2021 (count)	Closed @ 26 May 2021 (%)	Closed @ 4 October 2021 (%)
Shops <i>Class E – formerly Class A1</i>	106	62.0	1	0.9	2.8
Financial and professional services <i>Class E – formerly Class A2</i>	11	6.4	2	18.2	8.3
Restaurants and cafes <i>Class E – formerly Class A3</i>	13	7.6	1	7.7	15.4
Indoor sport and fitness <i>Class E – formerly Class D2</i>	2	1.2	0	0.0	0.0
Medical and health services <i>Class E – formerly Class D1</i>	2	1.2	0	0.0	0.0
Business offices <i>Class E – formerly Class B1</i>	-	-	-	-	-
Learning and non-residential institutions <i>Class F1 – formerly Class D1/D2</i>	1	0.6	0	0.0	0.0
Hotels <i>Class C1</i>	1	0.6	0	0.0	0.0
Drinking establishments <i>Sui Generis – formerly Class A4</i>	1	0.6	0	0.0	0.0
Hot food takeaways <i>Sui Generis – formerly Class A5</i>	9	5.3	3	33.3	20.0
Laundrettes <i>Sui Generis</i>	2	1.2	0	0.0	0.0
Betting and pay day loan shops <i>Sui Generis</i>	6	3.5	0	0.0	0.0
Sui Generis: Other	8	4.7	0	0.0	0.0
Vacant	9	5.3	-	-	-
TOTAL	171	100.0	7	4.3	4.9

Source:

Experian Goad survey updated by CPW Planning (26 May 2021).

More recent survey data (4 October 2021) derived from Welcome Back Fund monitoring.

Notes:

Excludes the full line-up of units/stalls within the Indoor Market.

Surveys carried out in the morning and thus potentially over-indicate the actual number of ‘closed’ hot food takeaways.

Vacant units identified are believed to be genuinely vacant, whereas the ‘closed’ units are assumed to be temporary closures for reasons relating to the Covid-19 pandemic.

Percentage of total units identified as ‘closed’ excludes vacant units.

Vacancy levels:

As shown in Table A above, our May 2021 survey identified nine vacant units in Edmonton Green. This equates to a vacancy rate of just 5.3% (as a proportion of the total number of units) which is well below average levels and a good indicator of the centre’s vitality and viability.

The most prominent vacancies observed were the two larger units previously occupied by Peacocks (630 square metres gross) and Argos (440 square metres gross) at the northern and southern ends

of Edmonton Green Shopping Centre respectively. The former Peacocks unit fronting North Square has since been refurbished and is now occupied by Jobcentre Plus.

The third largest void identified during our May 2021 survey (400 square metres gross) has recently been re-occupied as a bingo hall (Shipleys Bingo). Beyond Edmonton Green Shopping Centre, we identified two vacant units along Church Street to the west.

During our Welcome Back Fund monitoring in October 2021, we recorded five vacant units (a vacancy rate of circa 2.9% considering the total number of units shown in Table A).

Retailer representation and the balance between independent and multiple stores:

Edmonton Green's retail offer is largely focused on discount and value-based shopping. Asda and Lidl underpin the convenience goods offer. The former performs a key 'anchor' role to the south of Edmonton Green Shopping Centre and includes a bakery, delicatessen and pharmacy, as well as a substantial George clothing range and a B&Q 'click-and-collect' concession.

Other food stores include Iceland, Holland & Barrett (health food store) and a Londis convenience store. There are several independent supermarkets, greengrocers and butchers which help to provide a more distinguished offer.

The northern end of Edmonton Green Shopping Centre (North Mall and North Square) contains a number of 'value' comparison goods brands such as Home Bargains, Shoe Zone, Wilko, Matalan, and the recently opened Poundstretcher. There is also a Boots (chemist) and two major sports retailers: Sports Direct and JD Sports. Further south, the multiple stores include Superdrug, Pep & Co, Deichmann (focused around the Indoor Market) as well as Savers, Card Factory and Dreams (South Mall). The centre is also represented by independent retailers of clothing and footwear, jewellery, bags and other travel accessories, household goods, furniture, and carpets and flooring. The Indoor Market is a main attraction selling these types of items.

Edmonton Green's food and beverage offer is limited, in the main, to a small number of independent restaurants and cafes. There are three branded outlets – Subway, Domino's Pizza and Costa Coffee – and just one pub (The Railway Tavern fronting the Indoor Market). As mentioned previously, the centre is further lacking in terms of financial and professional services (Barclays and Lloyds are the two banks).

Overall, around 85% of the total number of units are occupied by independent businesses.

Customers' experience and behaviour:

There is no up-to-date survey evidence relating to customers' experience and behaviour.

Pedestrian flows:

During our inspections, we observed strong levels of pedestrian activity within Edmonton Green Shopping Centre between the Asda 'anchor' (to the south) and the Indoor Market (to the north). Further north, pedestrian flows were slightly weaker due to the relatively fewer footfall-generating attractions (albeit the northern end contains some larger, value-based retailers such as Matalan, Wilko and Iceland).

Pedestrian flows tailed off beyond Edmonton Green Shopping Centre including along Church Street, but to a lesser extent along Fore Street where the row of shops and bus stops increase levels of activity.

Table B below sets out the footfall counts recorded by CPW Planning during 2021, as of 25 January (during the Government-enforced lockdown) in addition to 30 April and 4 October. This monitoring was focused on a pavement on the western side of Fore Street and shows a mixed picture in terms of footfall levels in this location.

Table B – Footfall counts, Edmonton Green

Location – Pavement outside Ayintap, 395 Fore Street	
25 January 2021 (10:17 to 11:17)	
Footfall counts in direction of South:	Footfall counts in direction of North:
144	244
30 April 2021 (10:10 to 11:10)	
Footfall counts in direction of South:	Footfall counts in direction of North:
137	258
4 October 2021 (09:38 to 10:38)	
Footfall counts in direction of South:	Footfall counts in direction of North:
126	193

Source:

CPW Planning (monitoring for the purposes of the Reopening High Streets Safely Fund and the Welcome Back Fund).

Accessibility:

Edmonton Green benefits from excellent accessibility by public transport, reflecting a PTAL of 6a. It is served by Overground and rail services, and there is a bus station off The Green adjacent to Edmonton Green Shopping Centre. The bus station is therefore well located, making it easy for those using bus services to reach the core shopping area. Further bus stops are conveniently situated along Fore Street (notably outside Edmonton Leisure Centre and opposite the Asda supermarket) and Church Street (close to the rail station). During our site inspections, the Fore Street bus stops closest to the Asda supermarket appeared to be particularly popular and made a strong contribution towards pedestrian activity in this location.

Edmonton Green Shopping Centre offers a Shop Mobility service for those with mobility issues. The service is provided from a unit at the northern end of the centre, behind Jobcentre Plus. The centre itself comprises a partially covered pedestrianised shopping environment with adequate seating along the North and South Malls, within North Square, and outside Lidl along The Concourse.

The wider district centre is accessible on foot, with signal-controlled and dropped kerb crossings along Fore Street / The Broadway / The Green serving the main attractions and public transport services. These routes incorporate dedicated cycle lanes. However, the high levels of traffic can make it difficult for pedestrians to negotiate. There is some additional seating provided on the greenspace between Fore Street and the railway arches.

Edmonton Green is situated on Fore Street (A1010), approximately one kilometre to the north of the North Circular (A406) and to the east of the A10 respectively. Edmonton Green Shopping Centre provides around 1,000 parking spaces, including at St Georges multi-storey car park (419 spaces), South Car Park (407 spaces) and North Car Park (175 spaces). The car parks offer convenient parking for visitors to the wider centre and a good supply of disabled parking bays close to the main attractions and/or pedestrian exits.

At the time of our survey the main surface level car park, South Car Park adjacent to Asda, was at approximately 90-95% capacity. The busyness of this car park reflects the popularity of the Asda supermarket and the wider centre's offer in terms of convenience-based shops and services, most of

which have been allowed to remain open throughout the Covid-19 pandemic as ‘essential’ businesses. There is also a limited amount of ‘pay and display’ off-street parking along Fore Street and Church Street.

Environmental quality:

Edmonton Green Shopping Centre provides an enclosed shopping environment with reasonably modern shop fronts. Its main thoroughfares include seating and planters, and the shopper toilets and other facilities are clean and well signposted. There is an ‘outdoor’ square to the north of the scheme which includes more seating and a children’s play area.

The bus station is relatively modern and well-integrated with the adjacent Edmonton Green Shopping Centre. Further south, the wide east-west thoroughfare leading to/from the South Car Park comprises good quality public realm and provides opportunities for temporary market stalls and ‘pop-up’ street food vendors.

Environmental quality elsewhere within the centre is satisfactory. However, some of the shop fronts along Church Street are in need of improvement.

Perception of safety:

We identified no adverse issues with regards to safety or security during our site inspections, which were conducted during the day. The relatively strong levels of pedestrian activity throughout the centre serve to enhance the perception of safety, whilst the bus station is well-lit and partly overlooked by shops and other businesses.

Opening hours and the evening economy:

Most shops and services are open all week (with the possible exception of Sundays). The centre’s main supermarket, Asda, is open from 07:00 to 23:00 on weekdays and until 22:00 on Saturdays, with reduced Sunday trading hours (11:00 to 17:00).

Edmonton Green Shopping Centre, including the Indoor Market, is typically open for trading between the hours of 09:00-18:00 (although Sunday and individual store opening times may vary).

The centre has a limited number of ‘evening economy’ uses (pubs/bars/restaurants) but there are several hot food takeaways and cafes. A new bingo hall (Shipleys Bingo) opened in June 2021 within Edmonton Green Shopping Centre, which should help to extend the hours of activity and complement the other non-retail attractions such as the small casino and theatre(s).

Commercial rents:

Table C below identifies the rental levels currently sought within Edmonton Green Shopping Centre, based on information obtained from commercial property websites. No information is available for shop units within the wider centre.

Table C – Rental levels, Edmonton Green Shopping Centre

Shop unit	Ground floor area	Annual rent exclusive*
Unit formerly occupied by One Below (now occupied by Poundstretcher), North Mall	1,300 sqm	£250,000
Unit adjacent to The Railway Tavern, North Mall	55 sqm	£35,000
Unit adjacent to Savers, South Mall	138 sqm	£60,000
Unit adjacent to Lloyds, South Mall	85 sqm	£47,500

Source:

www.realla.co.uk (accessed by CPW Planning on 3 August 2021).

Notes:

Annual rent exclusive of business rates and service charges.

Barriers to business investment:

We have identified relatively limited evidence of significant barriers to new businesses opening and/or existing businesses expanding that are specific to Edmonton Green. The centre is vibrant and has a good mix of multiple and independent shops (within the limitations of its scale and function), and provides opportunities for indoor/outdoor market traders, pop-ups and shop retailers.

However, we consider that the main barriers to business investment are likely to include:

- the lack of residential and office-worker populations within the centre, limiting the ‘pot’ of expenditure available to support local shops and services; and
- the lack of connectivity between Edmonton Green Shopping Centre and the surrounding area, especially the shops and other businesses to the west of Fore Street.

PALMERS GREEN

Composition of uses:

Table A overleaf sets out the composition of uses (ground floor only) in Palmers Green based on Experian Goad's survey of the centre updated by CPW Planning.

The analysis focuses on several use categories having regard to the changes to the Use Classes Order effective since 1 September 2020. The analysis includes a record of the number of uses, or businesses, closed at the time of our survey (28 April 2021) in the context of pandemic-induced restrictions on 'non-essential' businesses being lifted on 12 April 2021. The proportion of businesses closed on 4 October 2021 is also shown.

The main findings in respect of the centre's composition of uses are:

- Nearly half (46.8%) of the units are occupied by shops, followed by financial and professional services (13.3%) and restaurants and cafes (also 13.3%). Hot food takeaways account for 4.9% of the total number of units.
- Of the total number of shops (95):
 - There are 44 shops in Palmers Green dedicated to comparison goods; notable sub-categories include homeware and furniture, electrical goods, charity or second-hand goods, and chemists.
 - Less than one-fifth (17) of all shops are convenience goods shops (i.e. supermarkets, health food stores, bakeries, off-licenses).
 - The remainder (34 shops) comprise retail services including a high proportion of hairdressers and beauty salons.
- The centre's financial and professional services largely comprise banks, estate agents, and the concentration of accountants and solicitors found to the north and south of Green Lanes respectively.
- There are five laundrettes and five betting and pay day loan shops, in addition to seven other sui generis uses.

In terms of the centre's ongoing recovery from the Covid-19 pandemic, a high proportion of all shops (about 91%) and financial and professional services (about 93%) have re-opened. Meanwhile, the rate of openings amongst other use categories – including those more orientated towards indoor gatherings (e.g. restaurants and cafes, drinking establishments, learning and non-residential institutions) – has improved notably over the period April-October 2021 as lockdown restrictions have eased.

Overall, 12% of all uses currently remain closed. This represents a steady improvement on the 28 April 2021 'closure rate' of 23.5% and compares with the 58% observed by CPW Planning during the national lockdown in January 2021.

Table A – Composition of uses, Palmers Green

Use Categories	Units (count)	Units (%)	Closed @ 28 April 2021 (count)	Closed @ 28 April 2021 (%)	Closed @ 4 October 2021 (%)
Shops <i>Class E – formerly Class A1</i>	95	46.8	11	11.6	9.4
Financial and professional services <i>Class E – formerly Class A2</i>	27	13.3	2	7.4	6.9
Restaurants and cafes <i>Class E – formerly Class A3</i>	27	13.3	16	59.3	26.9
Indoor sport and fitness <i>Class E – formerly Class D2</i>	1	0.5	0	0.0	0.0
Medical and health services <i>Class E – formerly Class D1</i>	5	2.5	2	40.0	0.0
Business offices <i>Class E – formerly Class B1</i>	7	3.4	1	14.3	0.0
Learning and non-residential institutions <i>Class F1 – formerly Class D1/D2</i>	4	2.0	2	50.0	0.0
Hotels <i>Class C1</i>	-	-	-	-	-
Drinking establishments <i>Sui Generis – formerly Class A4</i>	3	1.5	3	100.0	33.3
Hot food takeaways <i>Sui Generis – formerly Class A5</i>	10	4.9	7	70.0	30.0
Laundrettes <i>Sui Generis</i>	5	2.5	0	0.0	0.0
Betting and pay day loan shops <i>Sui Generis</i>	5	2.5	1	20.0	0.0
Sui Generis: Other	7	3.4	1	14.3	0.0
Vacant	7	3.4	-	-	-
TOTAL	203	100.0	46	23.5	12.0

Source:

Experian Goad survey updated by CPW Planning (28 April 2021).

More recent survey data (4 October 2021) derived from Welcome Back Fund monitoring.

Notes:

Excludes the units west of the rail station as these form part of Aldermans Hill Local Centre.

Survey carried out in the morning and thus potentially over-indicates the actual number of ‘closed’ hot food takeaways.

Vacant units identified are believed to be genuinely vacant, whereas the ‘closed’ units are assumed to be temporary closures for reasons relating to the Covid-19 pandemic.

Percentage of total units identified as ‘closed’ excludes vacant units.

Vacancy levels:

As shown in Table A above, our April 2021 survey identified seven vacant units in Palmers Green. This equates to a vacancy rate of just 3.4% (as a proportion of the total number of units) which is well below average levels.

Most of the vacant units were concentrated in the heart of the core shopping area and on the eastern side of Green Lanes; notably close to The Triangle (units 240-244 and 248) and northwards towards

Hazelwood Lane. This 'stretch' of vacancies included some larger units, including the former Iceland supermarket measuring 770 square metres (gross).

During our Welcome Back Fund monitoring in October 2021, we recorded nine vacant units (a vacancy rate of circa 4.4% considering the total number of units shown in Table A), including the former Co-op on the eastern side of Green Lanes.

Retailer representation and the balance between independent and multiple stores:

Palmers Green is reasonably well represented by supermarkets and other food stores despite the closure of Iceland, Waitrose and, most recently, Co-op (Greggs has also recently closed). The largest supermarket is Morrisons with a bakery, butchers, delicatessen, pharmacy, and a limited clothing range. Sainsbury's Local is the main 'basket shop' convenience store and there is a health food store (Holland & Barret) as well as the independent Fresh Food Market store to the north of the centre off Hedge Lane.

In terms of comparison goods, multiple stores include Poundland, Savers, Boots, EE, and Kodak. Clarks has recently closed. There are several charity shops and independent shops selling homeware and furniture and, to a lesser extent, electrical goods. The comparison goods offer is therefore limited but not unsurprisingly so given the centre's district centre role and function.

The takeaway chains include Subway, McDonalds, KFC and Pizza Hut; while the centre is particularly well served by specialist patisseries and bakeries. The centre also has a good selection of international food themed restaurants, with a concentration of such restaurants on the eastern side of Green Lanes between Hazelwood Lane and Osbourne Road.

Palmers Green has a strong offering in respect of financial services (the national banks include Barclays, Halifax, HSBC, Lloyds Bank, Natwest, Nationwide, Santander and Turkish Bank) and other professional services (e.g. estate agents, accountants, solicitors). The betting shop operators are Betfred, Ladbrokes and Paddy Power.

Overall, nearly 90% of the total number of units are occupied by independent businesses.

Customers' experience and behaviour:

There is no up-to-date survey evidence relating to customers' experience and behaviour.

The Retail Group's healthcheck of Palmers Green (July 2018) includes an *Operator Survey* and we summarise below the key findings relevant to the centre's attractiveness (albeit clearly from an operator and not a customer perspective).

- Palmers Green is a 'multi-purpose visit' centre. It is appealing to a local consumer base either living or working nearby, or to commuters.
- Around two-thirds of customers typically visit the centre daily or at least once a week, indicating a high frequency of visit.
- Average customer spending in Palmers Green is mixed: the highest average spend is less than £10 per visit, followed by over £50 per visit.
- The centre's main strengths relate to its community nature; its local shopping offer; good bus services/rates; the variety of independent businesses; and Broomfield Park.
- In terms of deficiencies in the centre's offer, the dominant responses concern a lack of clothing and department stores as well as restaurants and cafes.
- Other main weaknesses include a lack of car parking; the cycle lanes (i.e. they should be removed); too many vacant shops; a limited variety of shops; and poor safety (drugs).

Pedestrian flows:

During our inspections of the centre, we observed the highest pedestrian flows around The Triangle including towards Morrisons (to the west) and northwards to Park Avenue. There appeared to be a

number of linked-trips between Morrisons and the wider centre, probably facilitated in part by the supermarket’s car park which is free for up to two hours and provides the bulk of the district centre’s car parking.

Pedestrian activity was lower at the northern end of the centre (i.e. beyond Park Avenue) where there is reduced choice in terms of the retail offer and fewer footfall-generating attractions. Aldermans Hill west of the rail station, which forms part of Aldermans Hill Local Centre and has a slightly different character to Palmers Green, also had lower levels of footfall.

Table B below sets out the footfall counts recorded by CPW Planning during 2021, as of 8 January (during the Government-enforced lockdown) in addition to 28 April and 4 October. This monitoring was focused on a pavement on the northern side of The Triangle and shows that footfall levels have increased post-lockdown in both directions.

Table B – Footfall counts, Palmers Green

Location – Pavement outside Alfemo, 305-313 Green Lanes	
8 January 2021 (10:51 to 11:51)	
Footfall counts in direction of East:	Footfall counts in direction of West:
112	118
28 April 2021 (11:02 to 12:02)	
Footfall counts in direction of East:	Footfall counts in direction of West:
139	156
4 October 2021 (14:23 to 15:23)	
Footfall counts in direction of East:	Footfall counts in direction of West:
274	193

Source:

CPW Planning (monitoring for the purposes of the Reopening High Streets Safely Fund and the Welcome Back Fund).

Accessibility:

Although the centre has a PTAL of 3, it is served by Palmers Green rail station and there are several bus stops positioned along Aldermans Hill (including close to the rail station) and Green Lanes. The Green Lanes bus stops, which serve the centre’s main shopping and service attractions, include those situated adjacent to The Triangle, outside Poundland and The Alfred Herring pub, and (further north) close to the junctions with Park Avenue and Osbourne Road.

Palmers Green is surrounded by residential areas and is accessible on foot, with generally wide pavements and several crossing points. There are signal-controlled and dropped kerb crossings in and around The Triangle, as well as along Green Lanes (notably outside Poundland and close to the junction with Fox Lane). There is a zebra crossing further north, close to the junction with Osbourne Road. The most conveniently located crossing point for pedestrians moving between Morrisons and the rail station comprises dropped kerbs and a central island, but no signal-controlled or zebra crossing.

Seating is provided at The Triangle and the centre’s several bus stops/shelters, but there is a lack of seating elsewhere. Meanwhile, provisions have been made for cyclists. The entire length of Green

Lanes includes northbound and southbound cycle lanes. Some sections are incorporated along the pavements, but these are identified with different surfacing materials, and we observed no pedestrian/cyclist conflicts during our inspections. However, we note the 2018 Operator Survey identified the cycle lanes as a barrier to business trading (albeit less than 5% of operators cited this).

The main roads serving Palmers Green district centre include Green Lanes and Aldermans Hill; the former connects with the North Circular (A406) less than 500 metres to the south. In addition to limited ‘pay and display’ on-street parking, the bulk of the district centre’s parking is provided by the surface level car park (time restricted) to the rear of Morrisons. This provides convenient parking for users of the supermarket and, to a lesser extent, visitors to the wider centre (although the number of disabled parking bays is limited to six). The car park was at approximately 70-80% capacity at the time of our survey.

Environmental quality:

The centre’s environmental quality is satisfactory overall. Pavements are generally clean and well-managed, with sections on either side of Green Lanes incorporating cycle lanes. The Triangle is maintained to a good standard and includes some seating and planters, albeit passing traffic (and associated noise) serves to detract from pedestrians’ enjoyment of this area.

Shop fronts are in a reasonable condition although the concentration of larger vacant units within the core shopping area, on the eastern side of Green Lanes, has a negative impact on the centre’s environmental quality.

Perception of safety:

We identified no adverse issues with regards to safety or security during our site inspections, which were conducted during the day. That said, the concentration of vacant units (with shutters down) along Green Lanes is likely to create a poor perception of safety, especially after-dark; and we would further note that the 2018 Operator Survey identified poor safety arising from drugs as a main weakness of the centre.

Opening hours and the evening economy:

Most shops and services are open all week (with the possible exception of Sundays). The centre’s main supermarket, Morrisons, is open from 07:00 to 22:00 Monday-Saturday, with reduced Sunday trading hours (10:00 to 16:00).

The centre’s evening economy is driven by the numerous restaurants and, to a lesser extent, bars and pubs.

Commercial rents:

Table C below identifies the rental levels currently sought in Palmers Green, based on information obtained from commercial property websites.

Table C – Rental levels, Palmers Green

Shop unit	Ground floor area	Annual rent exclusive*
Unit adjacent to Holland & Barrett (now occupied by My Hair & Beauty), Green Lanes	228 sqm	£42,500
Unit formerly occupied by Carphone Warehouse, Green Lanes	84 sqm	£32,000
Unit at the northern end of Green Lanes	60 sqm	£18,000

Source:
www.zoopla.co.uk (accessed by CPW Planning on 3 August 2021).

Notes:
 Annual rent exclusive of business rates and service charges.

Barriers to business investment:

We consider that barriers to new businesses opening and/or existing businesses expanding (that are specific to Palmers Green) are likely to include:

- the prominent vacant units close to The Triangle having a detrimental impact on investor confidence and consumer perceptions of the centre; and
- competition from nearby centres with larger catchments.

SOUTHGATE

Composition of uses:

Table A overleaf sets out the composition of uses (ground floor only) in Southgate based on Experian Goad's survey of the centre updated by CPW Planning.

The analysis focuses on several use categories having regard to the changes to the Use Classes Order effective since 1 September 2020. The analysis includes a record of the number of uses, or businesses, closed at the time of our survey (8 May 2021) in the context of pandemic-induced restrictions on 'non-essential' businesses being lifted on 12 April 2021. The proportion of businesses closed on 15 October 2021 is also shown.

The main findings in respect of the centre's composition of uses are:

- Shops account for the highest proportion of units (41.9%), followed by restaurants and cafes (16.7%) and financial and professional services (14%).
- Of the total number of shops (78):
 - Demonstrating the centre's strong service-orientated offer, retail services (including hairdressers, beauty salons, opticians, and a post office) occupy 33 shops.
 - The 31 comparison goods shops include newsagents, chemists and shops selling clothing and footwear, electrical goods, and charity or second-hand goods.
 - There are 14 convenience goods shops comprising supermarkets, health food stores, bakeries, and patisseries.
- The financial and professional services category is dominated by banks and estate agents.
- Other uses include hot food takeaways (8), betting and pay day loan shops (5) and medical and health services (4).

Table A indicates an encouraging picture across most use categories in terms of the centre's ongoing recovery from the Covid-19 pandemic. The proportion of shops, financial and professional services and drinking establishments to re-open has increased over the period May-October 2021.

Overall, about 8% of all uses currently remain closed. This compares with about 15% in May 2021 and the 65% observed by CPW Planning during the national lockdown in January 2021, indicating a high degree of re-openings.

Table A – Composition of uses, Southgate

Use Categories	Units (count)	Units (%)	Closed @ 8 May 2021 (count)	Closed @ 8 May 2021 (%)	Closed @ 15 October 2021 (%)
Shops <i>Class E – formerly Class A1</i>	78	41.9	9	11.5	2.6
Financial and professional services <i>Class E – formerly Class A2</i>	26	14.0	6	23.1	4.2
Restaurants and cafes <i>Class E – formerly Class A3</i>	31	16.7	5	16.1	28.1
Indoor sport and fitness <i>Class E – formerly Class D2</i>	2	1.1	0	0.0	0.0
Medical and health services <i>Class E – formerly Class D1</i>	4	2.2	0	0.0	0.0
Business offices <i>Class E – formerly Class B1</i>	4	2.2	0	0.0	0.0
Learning and non-residential institutions <i>Class F1 – formerly Class D1/D2</i>	4	2.2	0	0.0	0.0
Hotels <i>Class C1</i>	-	-	-	-	-
Drinking establishments <i>Sui Generis – formerly Class A4</i>	3	1.6	3	100.0	0.0
Hot food takeaways <i>Sui Generis – formerly Class A5</i>	8	4.3	1	12.5	12.5
Laundrettes <i>Sui Generis</i>	2	1.1	0	0.0	0.0
Betting and pay day loan shops <i>Sui Generis</i>	5	2.7	0	0.0	0.0
Sui Generis: Other	12	6.5	3	25.0	12.5
Vacant	7	3.8	-	-	-
TOTAL	186	100.0	27	15.1	8.4

Source:

Experian Goad survey updated by CPW Planning (8 May 2021).

More recent survey data (15 October 2021) derived from Welcome Back Fund monitoring.

Notes:

Vacant units identified are believed to be genuinely vacant, whereas the 'closed' units are assumed to be temporary closures for reasons relating to the Covid-19 pandemic.

Percentage of total units identified as 'closed' excludes vacant units.

Vacancy levels:

As shown in Table A above, our May 2021 survey identified seven vacant units in Southgate. This equates to a vacancy rate of just 3.8% (as a proportion of the total number of units) which is well below average levels.

The vacant units were relatively disbursed throughout the centre. The largest vacant unit (410 square metres gross) was the former Bathstore unit along Winchmore Hill Road, while a further prominent void was the corner unit fronting Chase Side close to the bus station.

During our Welcome Back Fund monitoring in October 2021, we recorded eight vacant units (a vacancy rate of circa 4.3% considering the total number of units shown in Table A).

Retailer representation and the balance between independent and multiple stores:

Southgate has two supermarket chains – Asda and M&S Simply Food – which meet the main food shopping needs of the centre’s catchment. Asda includes a bakery, a pharmacy and George clothing range, while in-store concessions include Timpson and the ‘Panku Street Food’ offering. Beyond the supermarket chains and the Holland & Barrett health food store, the centre’s convenience goods offer includes a Greggs bakery and several independent patisseries and bakeries.

The only multiple comparison goods shops are WH Smith, Boots, Kodak, and Richer Sounds (specialist electrical goods retailer). Most of the district centre’s comparison goods retailers are therefore independents, including a limited number of shops selling clothing and footwear, electrical goods, and charity or second-hand goods.

Southgate’s food and beverage offer is reasonably modest and includes Pizza Express, Nando’s, KFC, McDonalds and Costa Coffee. These branded restaurants and cafes are supplemented by several independent operators including Turkish, Indian and Mediterranean food themed restaurants.

Despite the recent closure of HSBC and Santander, the centre is reasonably well served by national banks (i.e. Barclays, Halifax, Natwest) in addition to other services such as hairdressers, beauty salons and a post office. The betting shop operators are Betfred, Ladbrokes, Paddy Power and William Hill.

Overall, around 88% of the total number of units are occupied by independent businesses.

Customers’ experience and behaviour:

There is no up-to-date survey evidence relating to customers’ experience and behaviour.

Pedestrian flows:

During our inspections, the busiest parts of the centre were in and around the Asda supermarket (and car park) and along the northern side of Chase Side; particularly west of the pedestrian crossing to/from the Underground and bus stations where the attractions include a Boots chemist, a post office, and Tesco Express. We observed relatively moderate levels of footfall along Crown Lane, Ashfield Parade and Winchmore Hill Road.

Table B below sets out the footfall counts recorded by CPW Planning during 2021, as of 25 January (during the Government-enforced lockdown) in addition to 30 April and 15 October. This monitoring was focused on a pavement on the northern side of Chase Side and indicates that footfall levels have increased post-lockdown in both directions.

Table B – Footfall counts, Southgate

Location – Pavement outside Subway, 14 Chase Side	
25 January 2021 (12:15 to 13:15)	
Footfall counts in direction of East:	Footfall counts in direction of West:
128	156
30 April 2021 (13:58 to 14:58)	
Footfall counts in direction of East:	Footfall counts in direction of West:
144	167
15 October 2021 (13:05 to 14:05)	
Footfall counts in direction of East:	Footfall counts in direction of West:
175	186

Source:

CPW Planning (monitoring for the purposes of the Reopening High Streets Safely Fund and the Welcome Back Fund).

Accessibility:

Southgate is well served by public transport, including the Underground (Piccadilly line) and a bus station, reflecting a PTAL of 6a. The bus station is located at Station Parade, close to the Underground station and many of the centre’s attractions. The main public transport facilities are therefore conveniently located; however, step-free access to/from the Underground station for those with mobility issues is not available. Further bus stops serving the centre can be found along Chase Side (notably outside Boots, Nationwide and the Kervan restaurant).

Southgate district centre is accessible on foot, with sufficient crossing points along Chase Side and generally wide pavements throughout the centre (although the pavement narrows on the southern side of Chase Side between the Underground/bus stations and the police station). There are two signal-controlled crossings with dropped kerbs, outside Barclays and WH Smith respectively, while the main crossing points further east (e.g. adjacent to the Underground station) and west (e.g. adjacent to the Asda supermarket) comprise dropped kerbs with a zebra crossing and/or central island.

There is a lack of seating throughout the centre, with provision limited to the public realm outside the Underground/bus stations and outside St Andrew’s church. In respect of cyclists, there are no dedicated cycle lanes; but cycle hoops are provided (including on the pavements adjacent to the Underground and bus station).

Southgate lies approximately 1.5 kilometres to the north of the North Circular (A406) to which it is connected via High Street (B1452). The other main roads serving the centre include Chase Side and The Bourne (A111) and Winchmore Hill Road. Parking provision is available at the large Asda customer car park (time limited and including a good supply of disabled parking bays) which, at the time of our survey, was at approximately 80-90% capacity. Although located at the far western end of the district centre, this car park does serve users of the wider centre with some evidence of linked-trips observed during our inspections. M&S Simply Food also offers surface level car parking (including four disabled parking bays) on the eastern edge of the centre.

Environmental quality:

Southgate's environmental quality is generally satisfactory. Pavements and shop fronts within the centre are in a reasonable condition. However, the central area between the Underground/bus stations and the police station appears somewhat run down owing to the vacant corner unit and a prominent derelict site, while the police station itself offers very little in terms of active frontage.

Limited greenspace and seating is provided in proximity to the Underground/bus stations, albeit traffic congestion (and associated noise) serves to detract from the environmental quality of these spaces.

Perception of safety:

We identified no adverse issues with regards to safety or security during our site inspections, which were conducted during the day. Street lighting is provided in and around the Underground/bus stations which, together with passing traffic, serve to create a more secure environment after-dark.

Opening hours and the evening economy:

Most shops and services are open all week (with the possible exception of Sundays). Asda is open 24-hours on weekdays and until 22:00 on Saturdays, and from 11:00 to 17:00 on Sundays. M&S Simply Food trades between the hours of 08:00-21:00 excluding Sundays.

The range of 'evening economy' uses (e.g. pubs/bars/restaurants) is relatively limited; however, those that exist and are currently open (within the limitations of pandemic-induced restrictions) provide good attractions. The Kervan restaurant at the western end of the district centre, opposite Asda, appeared particularly popular at the time of our inspections.

Commercial rents:

There is no published information about rental levels in Southgate.

Barriers to business investment:

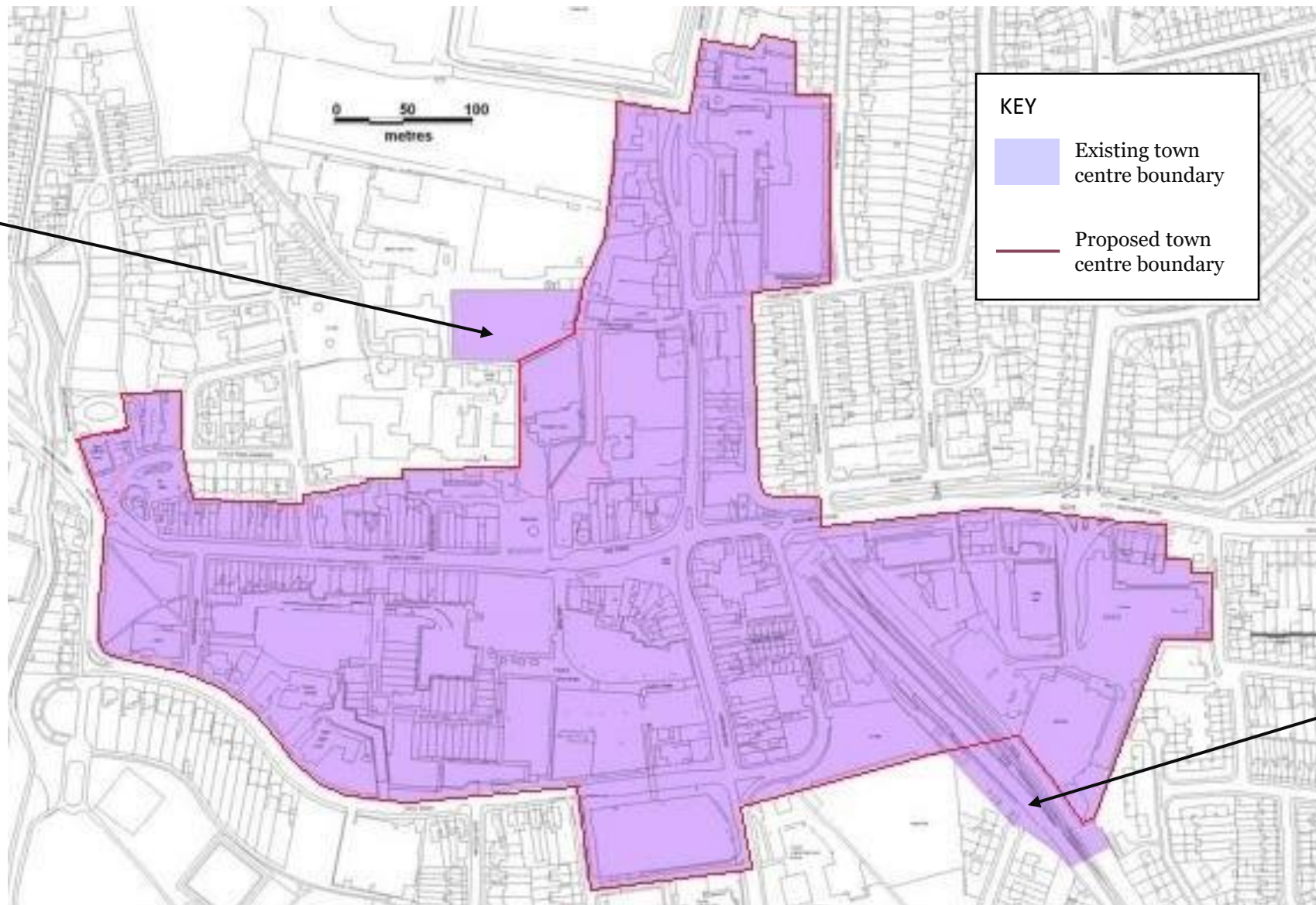
We consider that barriers to new businesses opening and/or existing businesses expanding (that are specific to Southgate) are likely to include:

- the threat of the loss of offices and permanent shifts in working habits (as experienced over the course of the Covid-19 pandemic) and the implications for town centre footfall and commuter spending;
- where there are vacant units available (e.g. between the police station and bus station), the environmental conditions necessary to attract investment are poor; and
- traffic congestion.

Appendix 3: Proposed Town Centre Boundaries

Enfield Town - *Main Centre*

Proposed amendment (a)



Enfield Town - *Main Centre*

Proposed amendments to town centre boundary:

Proposed amendment (a)

To exclude the burial grounds to the north of St Andrew's Church.

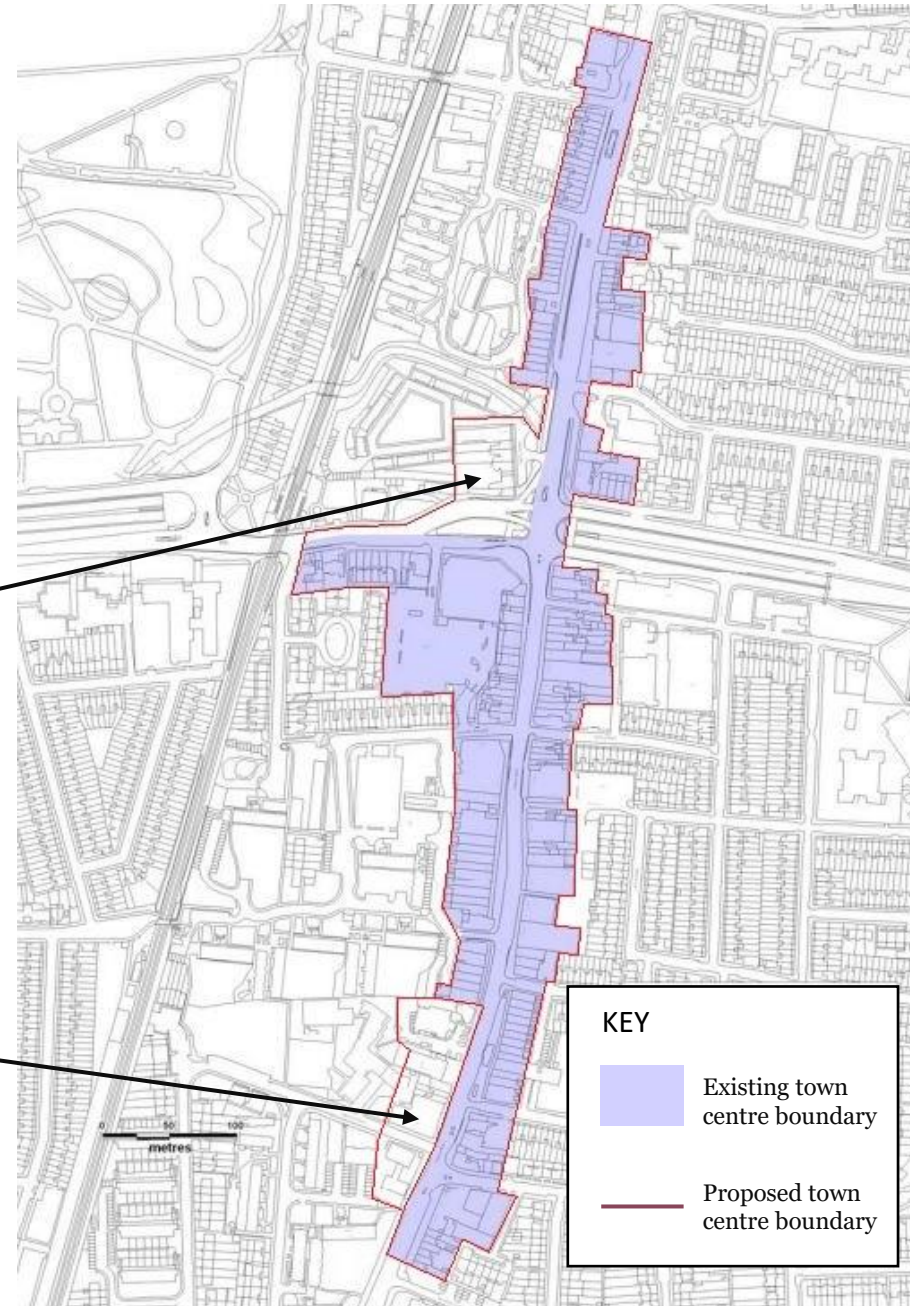
Proposed amendment (b)

To exclude the rail tracks to the west of the Tesco Extra supermarket.

Angel Edmonton - *District Centre*

Proposed amendment (a)

Proposed amendment (b)



Angel Edmonton - *District Centre*

Proposed amendments to town centre boundary:

Proposed amendment (a)

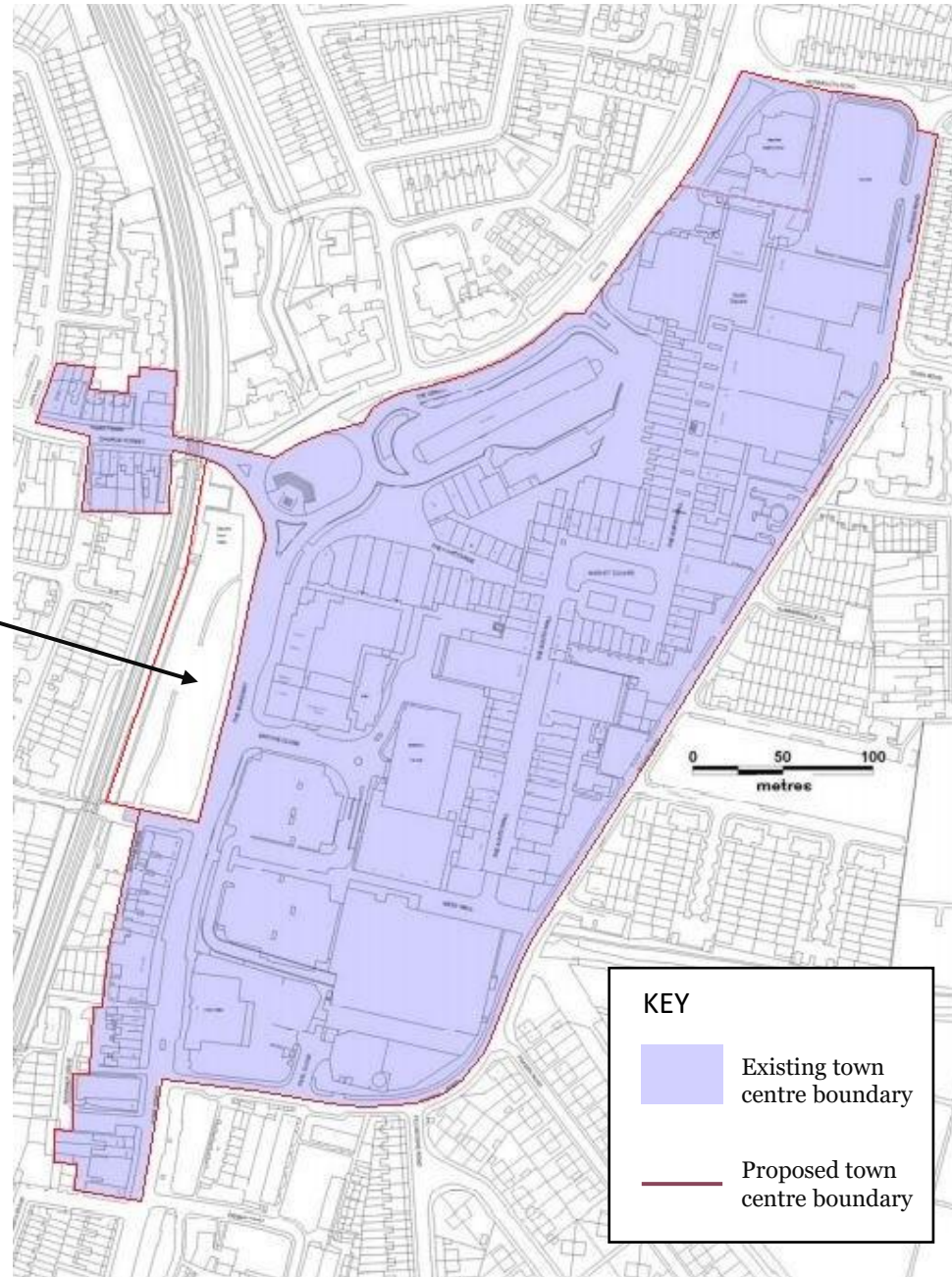
To include the buildings currently occupied by main town centre uses (including accountants, solicitors, a tuition centre, and a nursery) to the west of Fore Street, to the immediate north of the North Circular.

Proposed amendment (b)



To include the buildings currently occupied by main town centre uses (including estate agents, hairdressers, a café, a hot food takeaway, and the BP fuel station including a small convenience store) to the west of Fore Street.

Edmonton Green - *District Centre*

Proposed
amendment (a)



KEY

-  Existing town centre boundary
-  Proposed town centre boundary

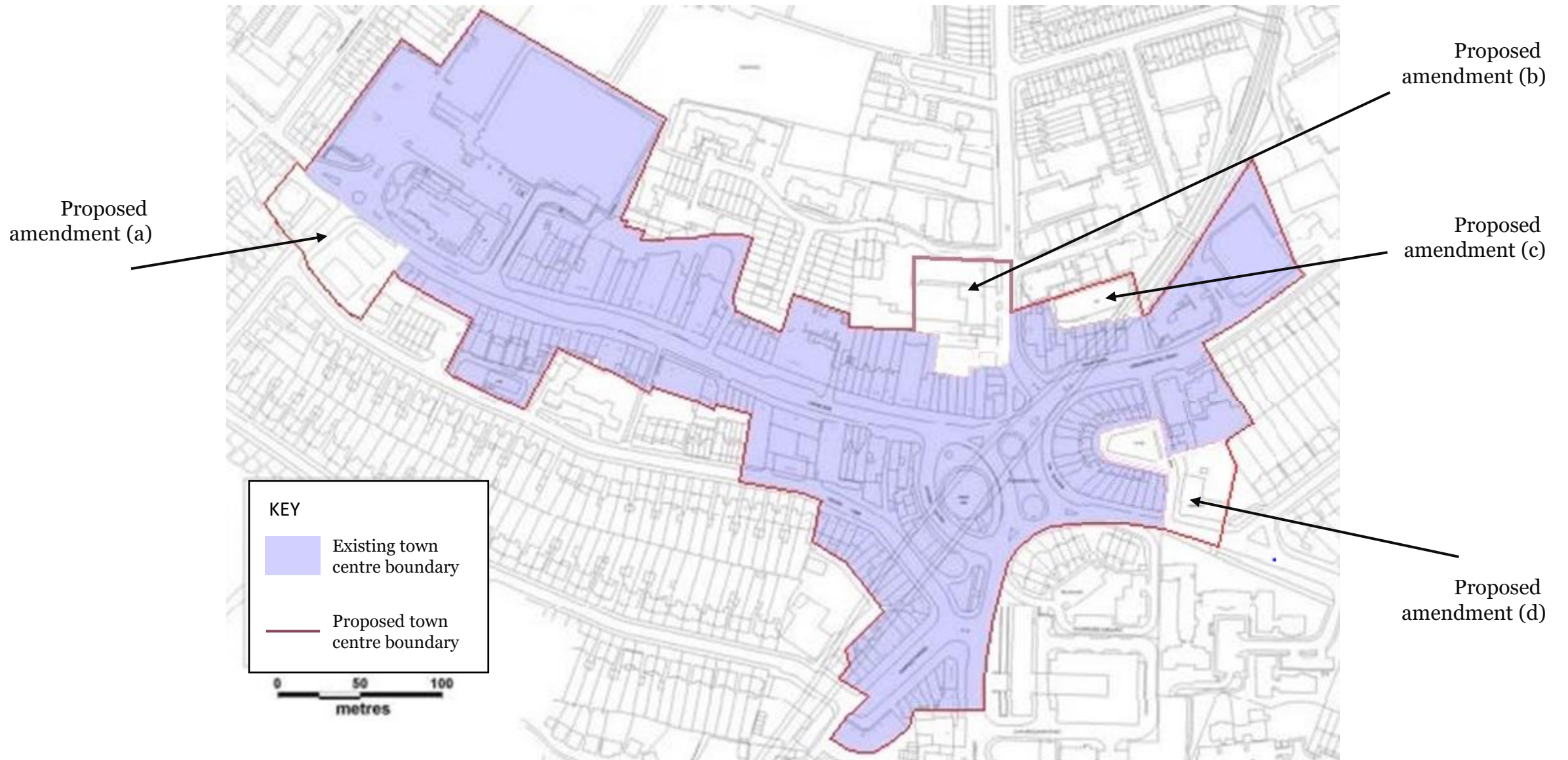
Edmonton Green - *District Centre*

Proposed amendments to town centre boundary:

Proposed amendment (a)

To include the railway arches (responding to the opportunity to activate the arches with non-residential uses), greenspace and Edmonton Green's Overground and rail station to the west of The Broadway.

Southgate - *District Centre*



Southgate - *District Centre*

Proposed amendments to town centre boundary:

Proposed amendment (a)

To include the building occupied by a restaurant (Kervan) and the BP fuel station including a small convenience store. Both comprise main town centre uses and are situated directly opposite the Asda customer car park, to the south of Chase Side.

Proposed amendment (b)

To include the shops and non-residential uses to the west of Chase Road.

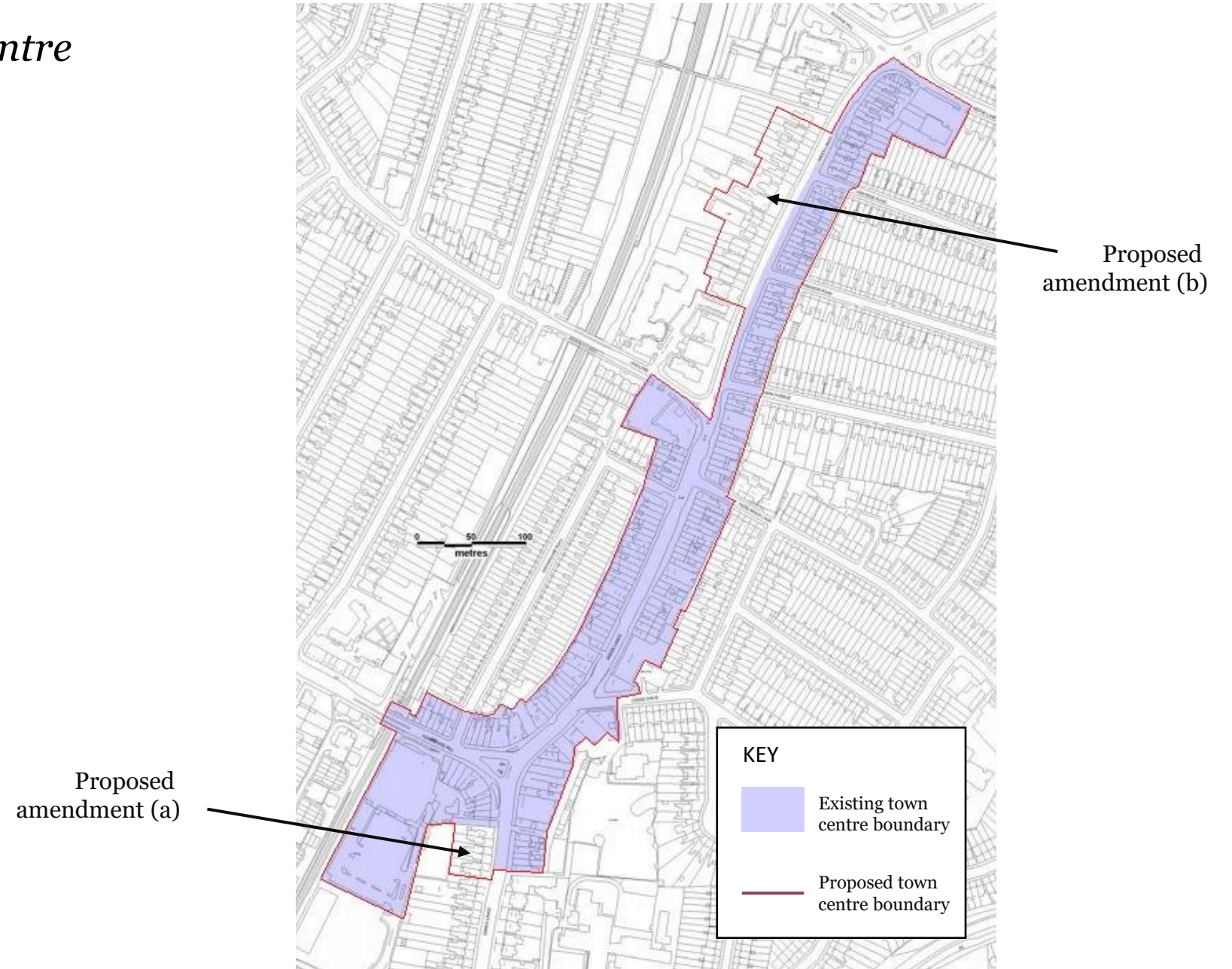
Proposed amendment (c)

To include the building occupied by a gymnasium (Pure Gym) to the east of Chase Road.

Proposed amendment (d)

To include the office block situated at The Bourne / Tudor Way junction.

Palmers Green - *District Centre*



Palmers Green - *District Centre*

Proposed amendments to town centre boundary:

Proposed amendment (a)

To include the buildings currently occupied by main town centre uses (including accountants and solicitors) to the west of Green Lanes, south of The Triangle.

Proposed amendment (b)

To include the buildings currently occupied by main town centre uses (including accountants, offices, and a dentist) to the west of Green Lanes, north of Fox Lane.