

WOOD

GREEN

INVESTMENT

FRAMEWORK

LOCAL ECONOMIC VITALITY STUDY

Date	Issued to	Revision	By	Checked by
02/09/15	LBH	/	AS	CN

Contents

Executive Summary

Introduction

Approach

High Road Mapping

Creative Quarter Mapping

Benchmarking Other London Metropolitan town centres

Case Studies – Town Centre Examples of Success

Interventions for Wood Green

Spatial Requirements



YATES

Nando's

McDonald's

Sainsbury's Local

meade

estate agents
020 8888 9595

SALES
SURVEYS

English / Turkish Breakfast

BUS
LANE

Executive Summary

The report has identified the following key points following a review of the GLA's historical Town Centre Health Checks (TCHCs):

- By total floorspace Wood Green is ranked thirteenth in the TCHC's ranking of the large town centres – including Major and International centres – and tenth for Metropolitan centres, with 120,757 sqm.
- Comparison goods retail accounts for only 76% of total retail floorspace in Wood Green where it falls at the lower end of the scale for Metropolitan centres at ninth with 68,702 sqm.
- Wood Green's leisure provision on the basis of the total number of leisure facilities (76) was well below the levels in other more comparable sized town centres such as Sutton, Ilford and Bromley.
- Restaurants and cafés make up the lowest percentage of leisure floorspace in Wood Green (31%) in comparison to the other Metropolitan centres whilst containing a high proportion of takeaways. Areas with high levels of takeaways, fast food outlets, and betting shops are generally of a poorer quality.
- Wood Green does not rank in the top 7 Metropolitan centres for office floorspace nor the top 15 for all large town centres, with only 35,900 sqm of office floorspace.
- Wood Green is outside the top 10 Metropolitan centres for comparison goods retail turnover (no turnover data provided in TCHC report).
- Wood Green has been achieving similar rental levels to Harrow and more recently Ilford. Whilst Hounslow and Sutton are in a lower rental band than Wood Green, Romford and Uxbridge Metropolitan centres appear to record rents approximately 30% or more higher.
- Boroughs should support and encourage town centre management, including the implementation of Business Improvement Districts (BIDs). Whilst 5 out of 12 Metropolitan centres have BIDs in place, Wood Green does not.
- Wood Green was not ranked in the top 20 for all TCHC town centres for access to the highest quality of open space. This is a key area where Wood Green could seek to improve on to increase the number of visitors to the town centre and help protect its position as a Metropolitan Centre.
- Of the Metropolitan centres, Wood Green had the 3rd highest number of collisions in 2011 with the greatest problem coming from private vehicles.
- Wood Green has the potential capacity to grow by accommodating a large number of dwellings around the town centre which would increase its vitality and viability.

Executive Summary

Through the three case studies for Croydon, Ealing and Shepherds Bush, the report has identified the following priority interventions and investment required to attract and nurture target businesses identified in the report:

- Develop a quality retail and leisure offer
- Support and promote SME businesses in Wood Green through a programme of focused initiatives
- Establish a Business Improvement District (BID) for Wood Green
- Utilise public sector assets and opportunities arising from new council accommodation requirements.
- Leverage improvements to public transport by increasing capacity, improving facilities, connectivity and appearance.
- Where feasible secure Opportunity Area status and put in place an Opportunity Area Planning Framework (OAPF) for Wood Green town centre
- Improve Wood Green town centre connectivity
- Deliver new or enhanced social infrastructure such as new libraries, security, health and education
- Develop a strategy for cultural initiatives delivery.
- Council leadership of strategic stakeholders to secure support and resources.

The report has identified the following spatial requirements that could be considered for inclusion within the development proposals for Wood Green as part of the Wood Green Investment Framework work:

- Develop a stronger retail offer on the High Road
- Develop Wood Green's spatial cultural offer
- Maintain, enhance and develop SME business floorspace
- Enable the delivery of new residential development at appropriate density
- Enhance town centre public realm
- Deliver new residential in appropriate locations and at density
- Maximise the potential of public transport infrastructure
- Enhance education quality and capacity
- Deliver new social infrastructure

Introduction

Following a review of existing studies commissioned by London Borough of Haringey and other key planning documents, a need was identified to undertake a Local Economic Vitality Study (LEV).

DTZ and Fluid have been instructed to identify the interventions and investment needed to improve the economic performance of Wood Green Town Centre, taking into account the maintenance of Wood Green's Metropolitan town centre status as defined by the GLA's Town Centre Health Check (TCHC)

report.¹

The following gaps in knowledge following a review of existing studies were identified that require addressing to respond to the requirements of the brief:

- A bottom-up view of investment and improvements required in Wood Green from local businesses.
- An understanding of current economic activity, digging deeper than mapping of use classes, including day and nighttime economy.
- A top-down understanding of how Wood Green is performing and can improve compared to other similar size town centres in London.

¹ The TCHC provides a 'snapshot' of the health of over 200 of London's town centres using a selection of strategic health check indicators and illustrates how these have changed over time.

Approach

The following approach has been taken to respond to the requirements of the brief:

1. Assessment of the future needs of current businesses through:
 - a. Doorstep / occupier survey (Fluid/Soundings)
 - b. Business 'Forum' meeting / workshop (in collaboration with the Haringey's newly appointed Business Engagement Manager) (Fluid/Soundings)
 - c. The above involved a sample of local businesses including retailers to interrogate a cross section of economic life in Wood Green, depict the current situation and understand local businesses future growth plans, associated accommodation requirements and their views on the town centre including improvement/interventions required in order to help secure their presence in the town and assist their growth plans. Data captured included:
 - i. Types of business
 - ii. Ownership structure including local involvement/ stewardship
 - iii. Employee numbers
 - iv. Premises (type – retail/office/studio/co-working), location, size, rent, lease term, accessibility)
 - v. Other occupier-specific requirements to operate
 - vi. Future plans (expand/contract/move)
 - vii. Barriers to growth
 - viii. Views on improvements required to town centre
2. Mapping by Fluid/Soundings of the High Street and side streets to map activity/use by day and by evening / night (ground floor and above (including vacancy) and opening hours. A comparison with a section of Green Lanes will be made. From this a percentage of different occupiers will be invited to a short interview as above.
3. Visual Essays – a series of photographic records of the area supporting the occupier surveys focussing on:
 - a. Shopping, markets, trading
 - b. Signs of public life (street life and otherwise)
 - c. Local businesses, makers, creative industry, entrepreneurs, performers
4. DTZ will identify gaps in the current business base relative to regeneration aspirations – for example this could include “higher quality” multiple retailers, creative and cultural industries, start-up businesses, etc. We would agree this list with LBH at the outset of the work.
5. Benchmarking other Metropolitan town centres. We have reviewed the performance of Wood Green relative to other Metropolitan centres in London based on data within the GLA's recent Town Centre Health Check exercises which inform the updating of the London Plan.
6. Examples of success – we have carried out analysis of three case study locations of town centres elsewhere in London which have achieved success in the last economic cycle in attracting and retaining the types of businesses that would fill gaps in the current business base as identified above. This will include an assessment of the interventions made to create the conditions to enable businesses to flourish.
7. Identify a hierarchy of business types with which to prioritise and focus (DTZ).
8. Identification of the resultant realistic priority interventions and investment required to attract/nurture target businesses, based on the results of the business consultations and case studies.
9. Identification of spatial requirements that should be fed into development proposals within the Wood Green investment framework.
10. An assessment of visitor perceptions elicited through the public consultation process covered elsewhere

JACAMOLE GRILL
 CALIFORNIAN LONDON
 FRESHLY MADE WITH LOVE!
 MEXICAN
 TORTILLA CHIPS
 WOOD GREEN
 LOVE
 ENJOY



£3.00
 £3.00
 £2.75
 £3.00
 £2.75
 £2.35
 £3.15
 £2.75
 £3.25
 £3.15
 £3.25

BREAKBAR SELECTION ICE CREAM

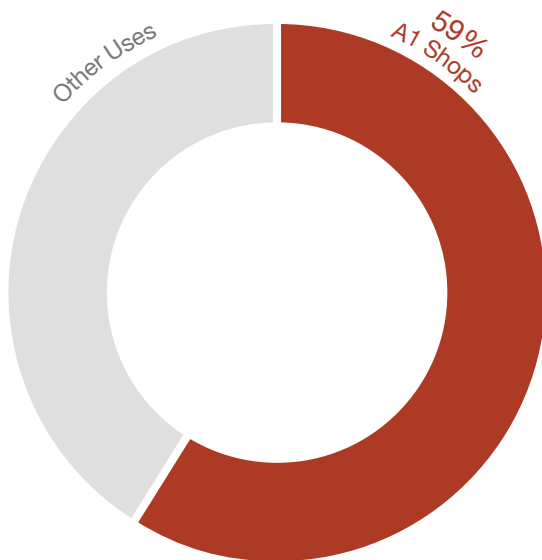
- Plain Oyster (£1.70)
- Oyster with flake (£2.00)
- BOAT SUNDAE (£2.00)
- Plain Tub (£1.00)
- Tub with flake (£1.00)
- Twin Cone (£2.00)
- Single Cone (£1.20)
- Single with flake (£1.50)
- Twin with flake (£2.50)

High Road Mapping - High street use classes

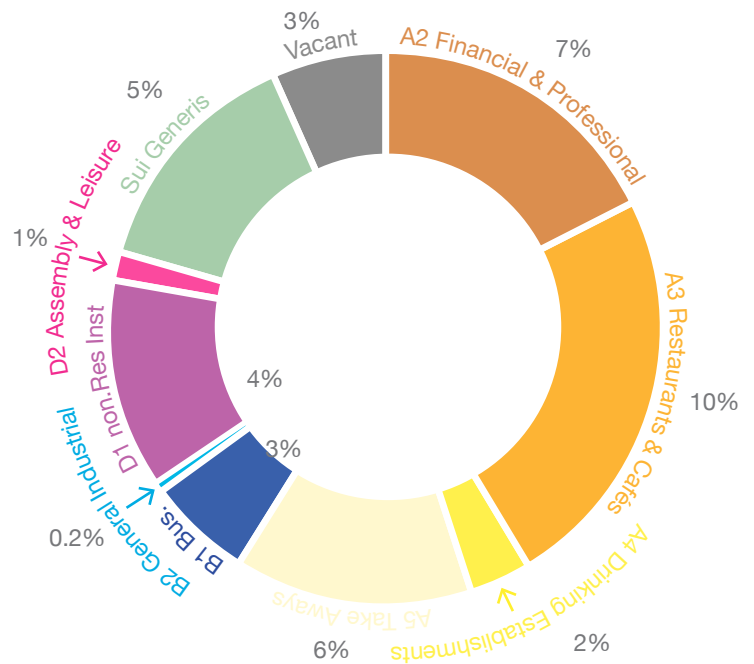
Within the AAP/IF area, the High Road, Turnpike Lane and Station Road, are dominated by A1 uses, accounting for approximately 59% of the surveyed area. 10% of the surveyed area comprises of A3 uses, restaurants and cafés, where food and drink for consumption on the premises, whilst 6% is taken up by A5 hot food takeaways. One nightclub and seven pubs, including the Jolly Anglers and Duke of Edinburgh which are of strong architectural merit, means that A4 uses account for 2%. A2 Financial and professional uses contribute 7% with banks and estate agents featuring highly. Betting shops and casinos are now classed as “sui generis” uses which make up 5%.

There is a noticeable lack of A2 leisure uses (1%) with only Mecca Bingo, the two cinemas and Easy Gym of note, the leisure offer is explored in more detail on pages 36-37. Notable business floor space is centred around Wood Green station with the council offices occupying a significant proportion of this. The only D2 use is a car garage to the north of the High Road. Vacancy throughout the study area is 3%. At first floor level the majority of activity occurs within the Mall and upper levels of the Vue Cinema.

‘1 Nightclub, 1 Bingo Hall, 2 Cinemas , 7 Pubs, 12 Vacant premises’



A1 as a percentage of ground floor use



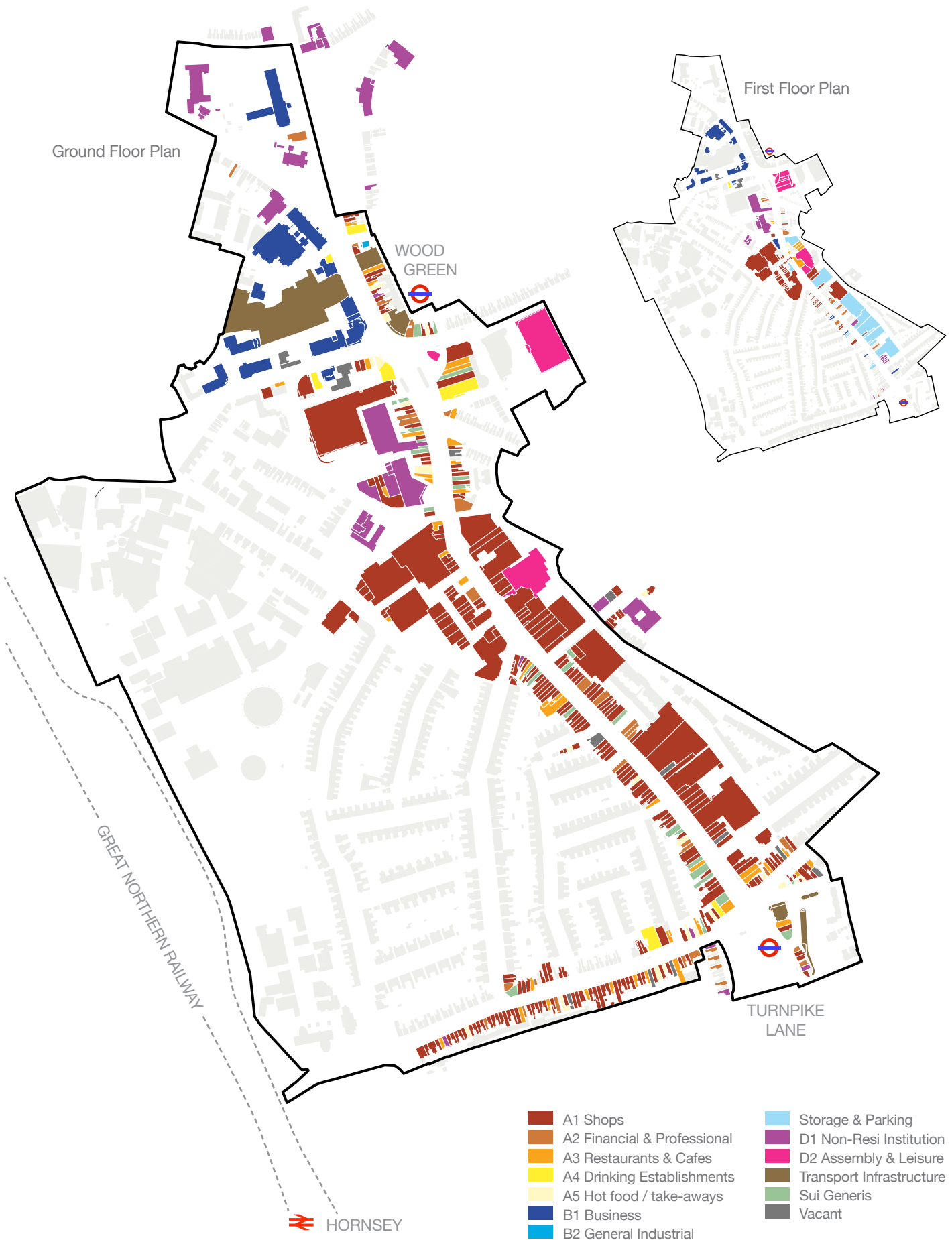
All other ground floor uses



Sui Generis - Cashino on the High Road



A2 - Halifax Bank within the former Empire Theatre



High Road Mapping - High street use classes



A4 Drinking Establishment - Entrance to Olympvs nightclub adjacent to the former Gaumont cinema



A4 Drinking Establishment - Monaghans Tavern, High Road



A3 Restaurants - Tinseltown within the Mall outside Cineworld



D1 Non-Residential Institution - Wood Green Library



B2 General Industrial - Fast Fit Tyres on Cranbrook Park at the northern end of the High Road



Transport Infrastructure - Buses leaving the Wood Green Bus Depot on the High Road



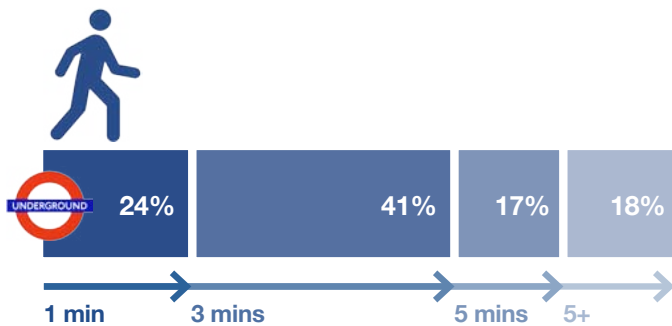
B1 Business - River Park House at the junction of Station Road and the High Road

High Road Mapping - Opening Hours

A mapping of opening times of High Road businesses reveals trends in Wood Green's night-time economy and activity and confirms the perception that it is a very typical high street that closes down at night. At street level approximately 74% of businesses across the High Road and Turnpike Lane close at 7pm leading to a vast number of inactive frontages outside of typical working hours. Of the remainder approximately 7% are open till 9pm, 16% till midnight and 3% beyond.

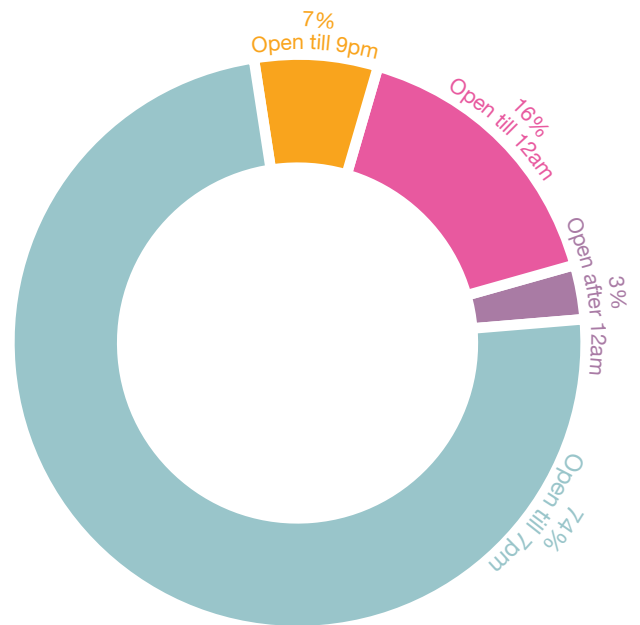
Of those businesses that are open beyond 7pm just under 65% of those are located within 3 minutes walking distance from either Wood Green or Turnpike Lane stations. The notable exceptions to this are the eastern side of the Mall where the Easy Gym and Lidl supermarket are open later and, although not included in these figures due to its first floor position, this area contains the Cineworld and associated restaurants which despite being open till late, it has no street frontage thus failing to provide any activation. McDonalds is also open until 12pm and is situated at the centre of the High Road between the two stations.

24% of businesses open beyond 7pm are within 1 minutes walk of either tube station and 72% are within 5 minutes clearly indicating the importance of public transport accessibility to the evening economy. Of the 18% that are outside of this walking distance are typically betting shops and fast-food outlets catering for local demand. Along with its relatively small presence, the evening economy suffers from a lack of diversity or high quality offer.



Businesses open beyond 7pm and their distance from key stations

'65% of businesses open beyond 7pm are within a three minutes walk of the two tube stations'



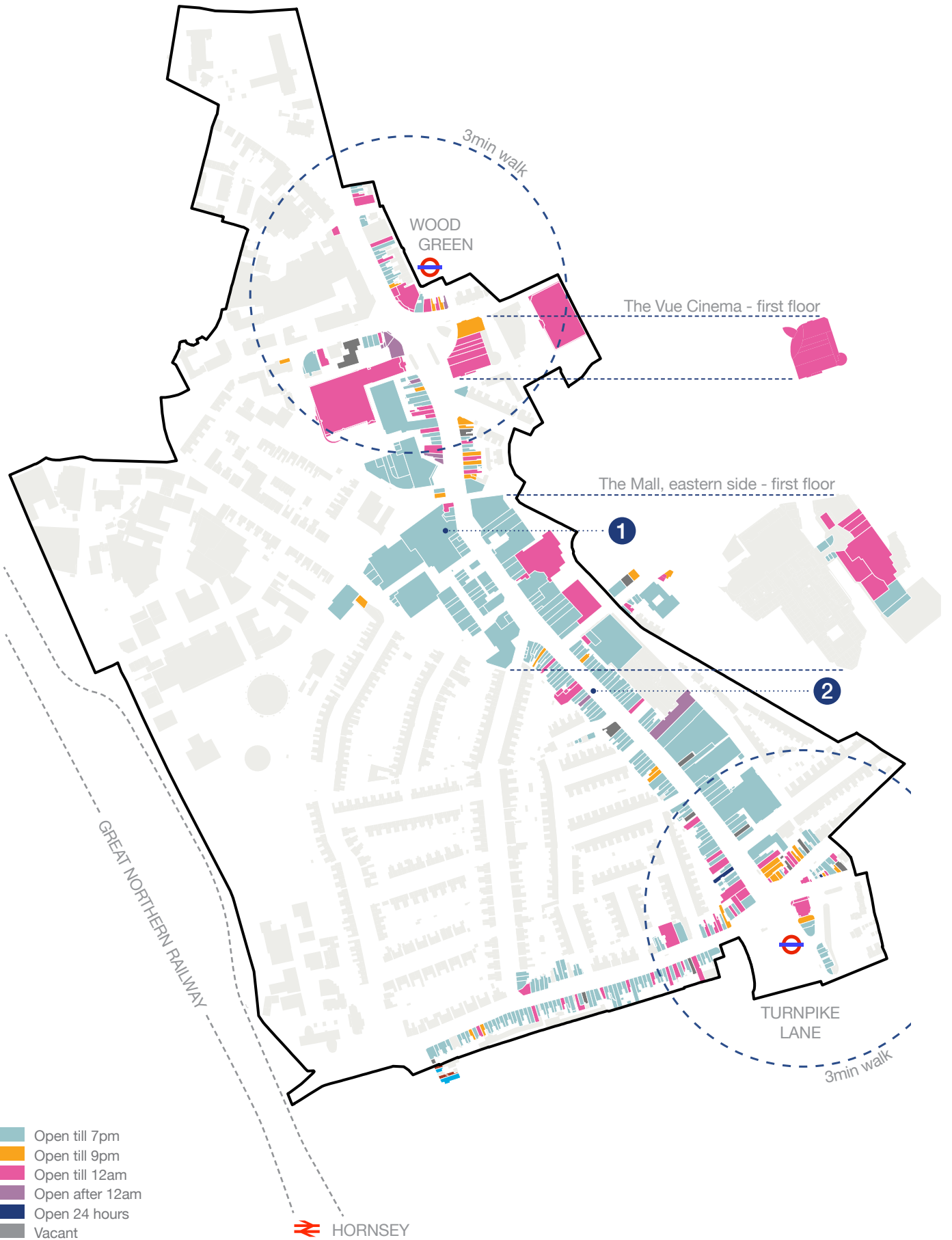
Business opening times



The Mall prepares to close at 7pm



McDonalds is open till late at the centre of the High Road



High Road Mapping - Opening Hours



The High Road at 9pm become a very quiet place with busses, their passengers and illuminated signage are the main evidence of activity.



By 9pm hostile shutters dominate the High Road





Despite recent public realm improvements the space in front of Wood Green library relies heavily on the illuminated 'Library' signage

High Road Mapping - Active Frontages

Wood Green's 'backs' problem is well documented and its extent is illustrated here with the emphasis on the High Road and Turnpike Lane as key destinations clearly visible, with 82% of all surveyed active frontage throughout the AAP/IF area being found in these locations. Aside from being inactive, most elevations behind the High Road have a detrimental impact on their surroundings most commonly because of a scale and materiality unsympathetic to its context and hostile security treatment along key boundaries. Around the 'Creative Quarter,' Karamel restaurant and the Duke of Edinburgh pub offer some frontage but aside from this most activity is hidden from the casual observers view. There are areas of commercial frontage but their relationship with the streetscape is limited.

What is notable in this map is the lack of active routes that lead away from the High Road towards the east or west, connecting to areas such as the Creative Quarter. Provision of such routes would be central to driving footfall and encouraging exploration and activation of other spaces that exist beyond the High Road.

'Between 9am and 7pm, 82% of all active frontages in the study area can be found on Turnpike Lane and the High Road'



Service yards to the rear of the Mall



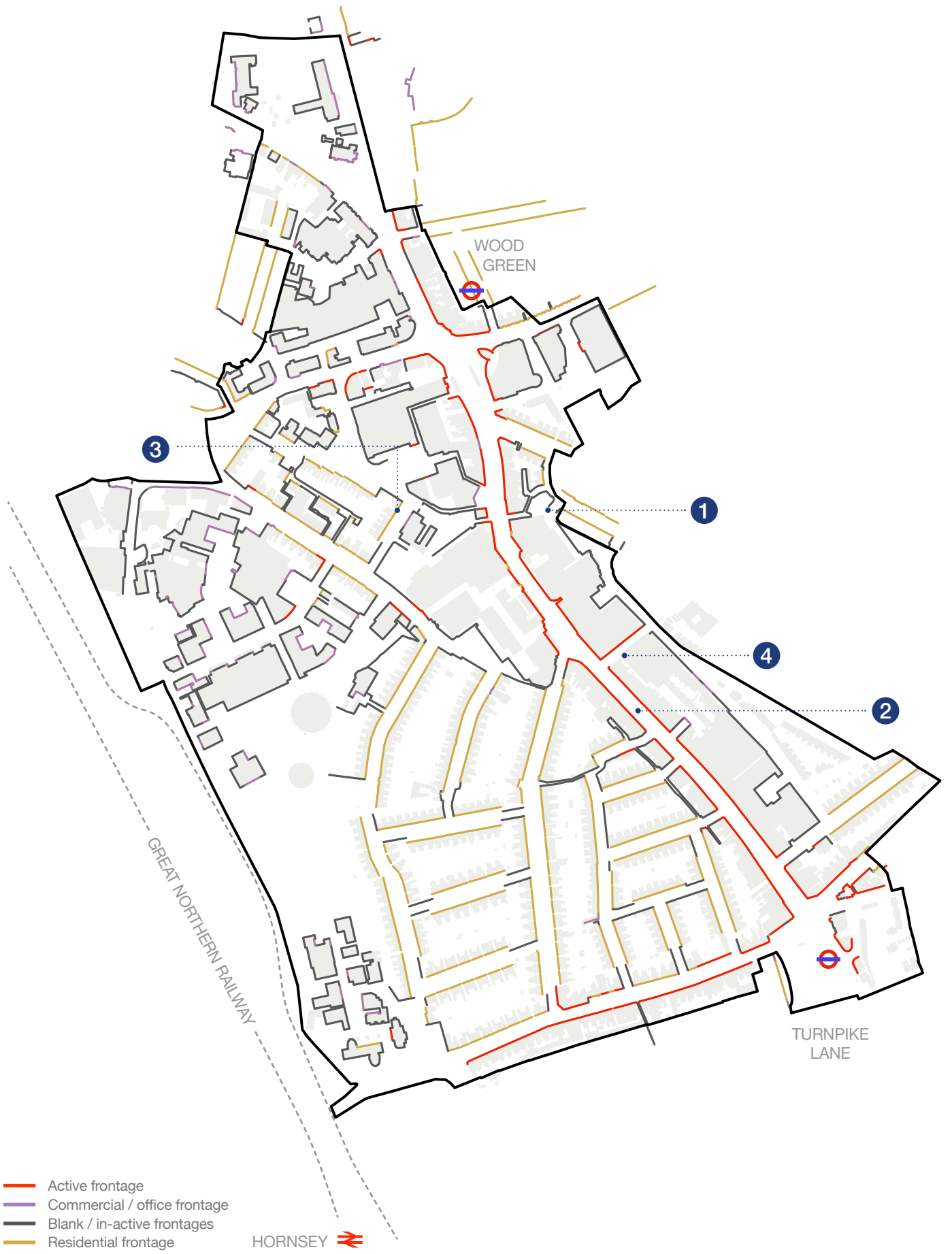
Retail units on the High Road



Service yards to the rear of the Mall



Retail units within Cheapside Arcade on the High Road



High Road Mapping - Street Life

This map illustrates street life throughout the Wood Green AAP/IF boundary, which provides evidence of informal economies such as street markets and entertainers that help create a recognisable and memorable streetscape whilst providing a more qualitative assessment of the high streets health.

Notable evidence of economic activity on the street comes in the form of outside customer seating for businesses such as Coffee Republic and Gokyuzu & Kervan, popular and well used during the summer months and reflecting a 'continental' attitude that is visible in the area. However, the chain restaurants beneath the Vue Cinema (photo 1) and those connected to Cineworld on the first floor of The Mall are under used with the later also suffering from a lack of street frontage. Retail displays that extend onto the high street add vibrancy and are frequent on Turnpike Lane where businesses such as greengrocers often make use of generous forecourts. Similarly, street markets are common and well used with areas such as the Mall's Market Hall forming a valuable but an under utilised asset that reflects the areas diversity. Street entertainers have been sited and help indicate areas of high footfall. Public seating has emerged as a priority in consultation and the need is highlighted here with relatively few spaces for individuals to dwell.

'There are xx market stalls throughout the study area'

NUMBER TO BE CONFIRMED



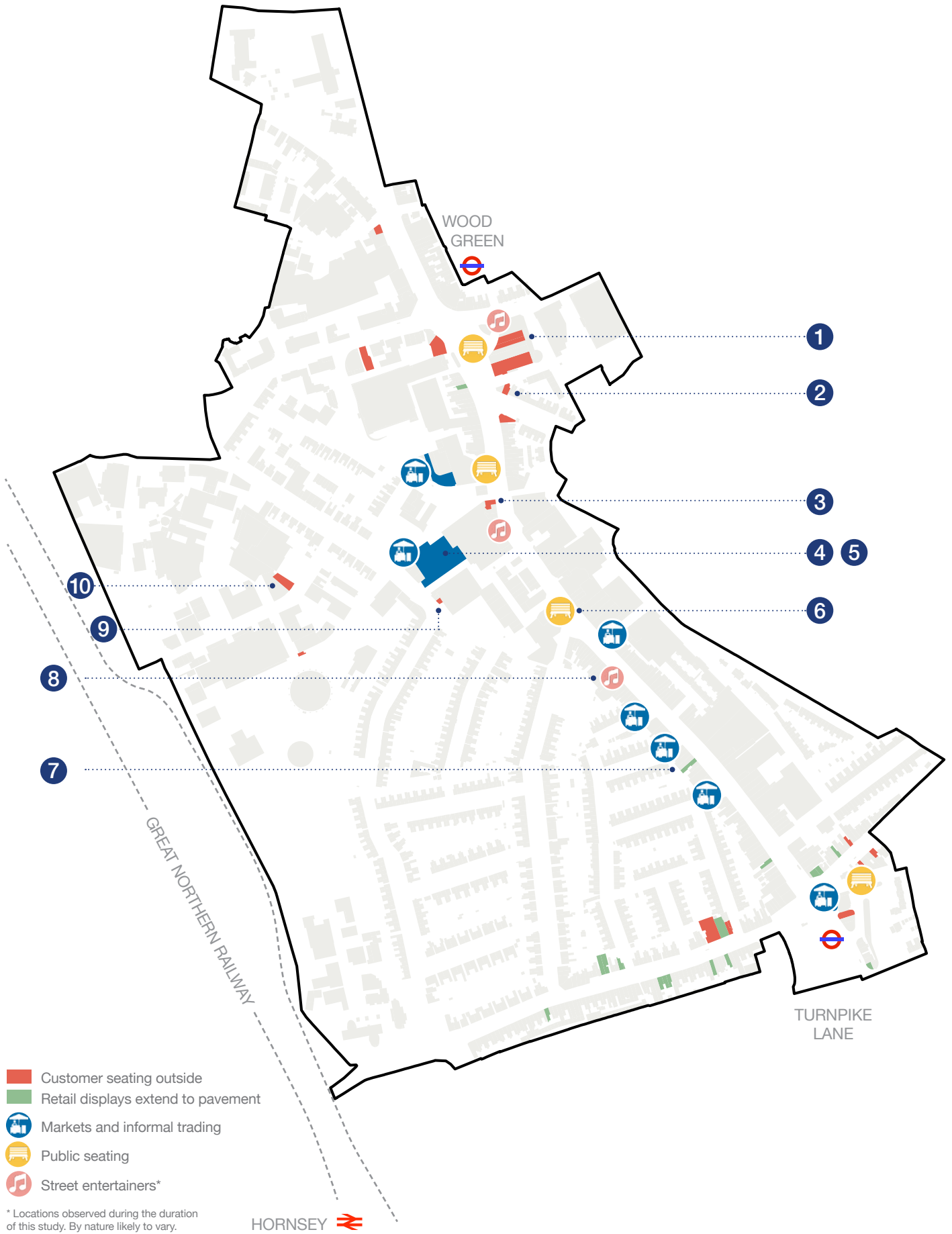
Under used chain restaurants with outside seating beneath the Vue Cinema



The Black Tap coffee shop on the corner of Gladstone Avenue



The popular Gokyuzu and Kervan restaurant



High Road Mapping - Street Life



4 Fishmonger within The Mall's Market Hall



5 Greengrocer within The Mall's Market Hall



6 Public seating at the southern end of The Mall



7 Retail display opening onto High Road



8 Street entertainer on the High Road



9 Rear entrance to the Market Hall with cafe outside

10



Karamel restaurant within Chocolate Factory 2

Creative Quarter Mapping - Business mapping



- Imprimer Fine art Photographic and Giclee printing ■
- Nemesis (london) □
- Intern/ Decorative design ltd □
- Fericka Osbourne □
- Georgia Hardinge limited ■
- Hubert and Calvin ■
- MBNLP ■
- 3F Croatian Villas ■
- MTF Services ltd ■
- The Wellbeing Centre □
- Viridian Housing □
- Landslide & subcoustic □
- 306 Collective ■
- Collage arts studios ■
- Mountview (Rehearsal studio) ■
- Sir john mills studio ■
- 4F MTF services ltd ■
- Sour Grape □
- Ecologists □
- Xylonite □
- Saana Consulting ■
- Taxassist Accountants ■
- Warners Group publications ■
- Contraband International Limited ■
- Fabulous Brands ■
- 10. Balfour Beatty (1980's extension) ■
- 11. Light Industrial Workshops ■
- 12. Celtic Bakers ■
- 13. Faith Miracle Centre ■
- 14. The John Dewey Independent Specialist College, Area 51 ■
- 15. Mountview TV & Film Studio (Mallard Place) ■
- 16. Urban Futures ■
- 17. Mountview Academy of Theatre Arts (Kingfisher Place) ■
- 18. Chocolate Factory 2
- GF Karamel Cafe ■
- Polskie Centrum Finansome ■
- 1F Applebeam ■
- Andrew Wiard ■
- Zeroculture □
- S.N.I Fashions ltd □
- 2F Ben & Max Ringham ■
- Bilimankhwe Arts ■
- Collage arts ■
- Cabaret by Sali ■
- Mountview Academy of Theatre Arts ■
- Studio Klank ■
- Select Recording studios ■
- Cocorose London ■
- Pipe Dream studio □
- Ricky Russell □
- Border Crossings □
- Conspiracy Limited □
- Talent Match London ■
- 3F 50:50 Recording ■
- Boss Nails & Beauty Academy ■
- Leif Storm studios ■
- Mountview Academy of Theatre Arts ■
- Imaginereel ■
- Jon Bird ■
- Full Moon □
- The Gentlemen's club □
- Report Photos □
- Sarah Lee □
- Studio 5 □
- Tatt City ■
- Wonder Works Limited ■

- 4F Artkapsule □
- Alchemiya □
- Matrix Media □
- Meeco London □
- Damien Morley ■
- Electric Sunshine ■
- Gazelle Media ■
- Girl Management ■
- Matt Lord Music ■
- Sara Selby ■
- Savage Corset ■
- Savage Smalls ■
- Wood Green films ■
- Yi dai ■

19. Parma House

- Fordams & Co. Ltd □
- Igloo Vision □
- Corycia Limited □
- Mountview (Cameron Mackintosh Studios) ■
- Ingeus ■
- Hippo School ■
- St Ignatius Housing Association Limited ■
- Key Support ■
- Beyond Hair ■
- Stiletto by Q R.I Limited ■
- Lupotex Trading Limited ■
- Multiroofing Systems Ltd ■
- In Harmony Dental Studio ■
- Green Hippo Limited ■

20. Cypress House

- Zone Gym ■
- London Wing Chun Academy ■
- Kidz Adventure Playzone ■
- The Village Factory ■
- DGS Grading & Samples ■
- Maxella GK ■
- 5E Limited ■
- Petre Weigl Studios ■

- 21. Safe Store ■
- 22. Pearl Gate ■
- 23. Duke of Edinburgh Pub ■
- 24. Livingston studios ■

Bittern Place

- 25. London Calling ■
- 26. Alpacino ■
- 27. Bluenile ■
- 28. Gimme Five ■
- 29. ? □

Olympia Industrial Estate

- 30. PJ Johnson & Co ■
- 31. Turnaround ■
- 32. Nikita ■

57-77 Coburg Road

- Adalar Ltd □
- B.Gumus □
- Destiny Weddings ■
- Ladys Garment Ltd ■
- G.W Twilley & Son Ltd ■
- M K Dental Art Ltd ■
- Peter Downey Pottery ■
- Victory International Church UK ■

Creative Quarter Mapping - Photographic studies

Chocolate Factory 1

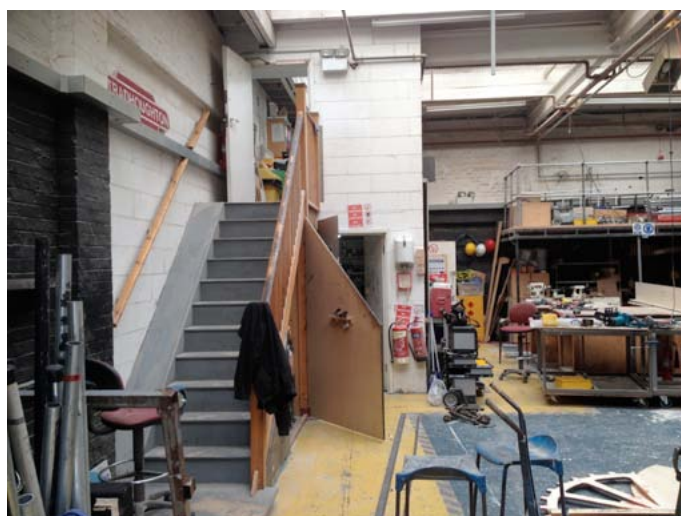
Based on Clarendon Road at the heart of the creative quarter, Chocolate Factory 1 is predominantly managed by and is home to a variety of Haringey-based creative industries. Drama school Mountview has workshop space here as does sign maker Goodwin and Goodwin. There are also fashion businesses, music producers and photographers based here alongside businesses such as accountants. Collage Arts sub-let studio space from here and the highly regarded Mosaica restaurant can be found on the ground floor.



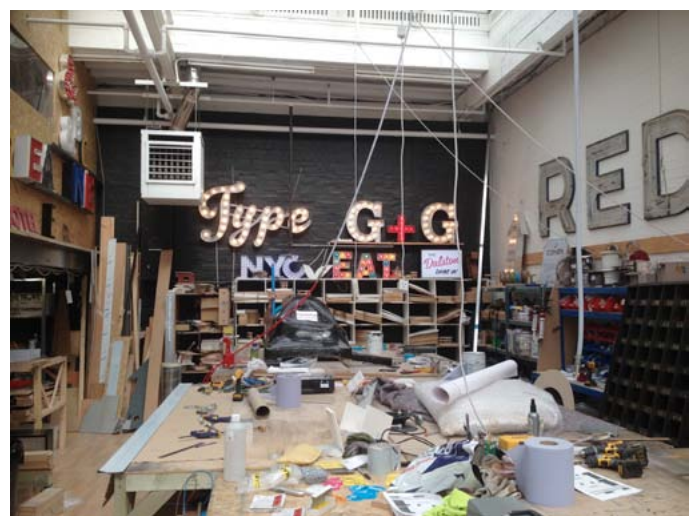
Inside Mosaica restaurant



Entrance to Chocolate Factory 1 from Clarendon Road



Mountview workshop



Goodwin and Goodwin sign makers

Chocolate Factory 2

Chocolate Factory 2 is based on Coburg Road and similar to CF1 provides creative workspaces for artists. The site is the main home of Collage Arts who are based here and manage a number of the workspaces. Collage Arts are a arts charity creating greater participation in the creative industries by providing greater access and support to under-represented sections of the community and providing a range of learning projects, business support, facilities and resources. They help run and manage events such as N22 Open Studios, Haringey Literature Live and Karamel Music Club which is held at Karamel restaurant on the ground floor of Chocolate Factory 2.



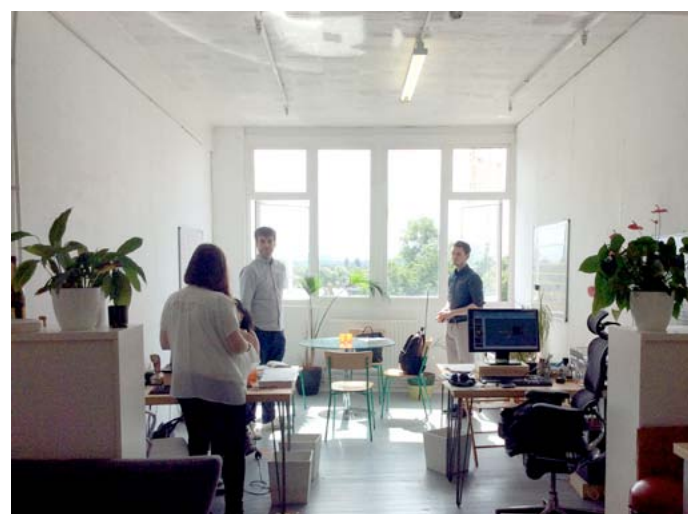
Wood Green Films offices



Chocolate Factory 2 on Coburg Road



Alchemiya office space



Electric Sunshine office space

Creative Quarter Mapping - Photographic studies

Bittern Place

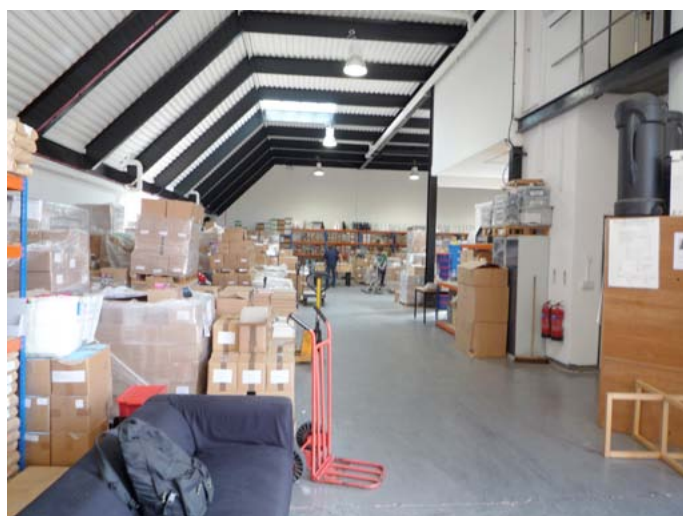
Bittern Place is located off Coburg Road, which links with Mayes Road to the east. The property comprises 3 semi-detached single span units, on a multi-let estate. The warehouse buildings are of steel portal frame construction with brickwork and curtain glazing elevations. It primarily provides warehouse and logistics space. One tenant is London Calling, an arts marketing service who advertise events and venues in London and use the space for printing and organising flyer and poster distribution.



Industrial units and loading space within Bittern Place



View of the gasholders from Bittern Place



London Calling printing and distribution



Blue Nile, clothes and fabric manufacturer

Cypress House

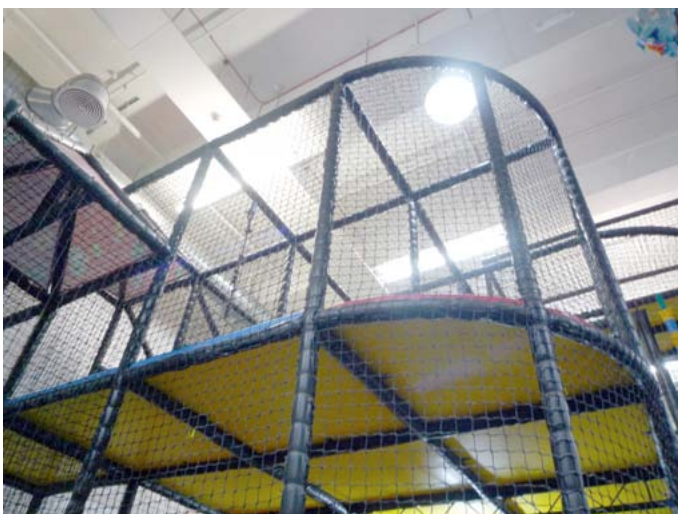
At the eastern end of Coburg Road, Cypress House notably contains a number of leisure uses including the Zone Gym, the London Wing Chun Academy and Kidz Adventure Playzone. It is also home to Petr Weigl, an award-winning artist specialising in contemporary art pieces created from concrete, glass and ceramics. He also rents studio space to young ceramic artists helping create a thriving creative network.



Cypress House seen from Coburg Road



Zone Gym



Kidz Adventure Playzone



Petre Wergl studios, rentable space for ceramic artists

Creative Quarter Mapping - Interviews

A series of business interviews are being carried out within the Creative Quarter to understand how the area 'works' - who works here, what they do, what their needs are, their thoughts on the area and ideas on what would make Wood Green a better place to work in or from. It will focus on capturing the following data:

- Types of business
- Ownership structure including local involvement/stewardship
- Employee numbers
- Premises (type – retail/office/studio/co-working), location, size, rent, lease term, accessibility)
- Other occupier-specific requirements to operate
- Future plans (expand/contract/move)
- Barriers to growth

A detailed business database has been compiled for the Creative Quarter and each of the tenants has been sent an introductory letter and questionnaire by email. A sample 5% of businesses from various fields and specialisms will then be targeted for an in depth interview in person or over the phone. This process is ongoing.

These are extracts from some of the initial conversations; the full interviews will be reproduced in the appendix.

Wood Green Films, Lloyd Gardner



Wood Green films are a bespoke media company and award winning professional filmmakers. The company is led by creative director Lloyd Gardner who has over twenty years of acclaimed film, television and video production experience.

How long have you been here? Since 1998, originally attracted by cheap rents. Creative businesses do not make a profit everyday and consequently need to find ways of being sustainable thus the need for access to affordable space. I have had to diversify and take risks in order to survive, affordable workspace gives you the freedom to experiment.

What would you like to see in future to support you? A venture similar to Camberwell Studios which hires film, video & TV production studios would be valuable as there is a demand and I would consider managing such spaces. There could also be a consortium formed to allow various businesses to come together and bid for projects as well as acting as a network to bring people together. Needs a vision thats delivered, when I first arrived Iceland was going to be an art gallery. Lots of nice ideas havent come forward.

What types of spaces is there a demand for? There is a big demand for affordable desk and studio space for freelancers however designers should be cautious of the model used. Tottenham's 369 is not seen as successful as it is unwelcoming and is not reflective of the local area.

What are the strengths of Wood Green? Culturally very diverse, the people are 'real' here and there is a sense of authenticity, different to Shoreditch which feels like a performance. The Market Hall is fantastic with some very good restaurants whilst Brooks Café on Brook Road is a local gem.

Size of company? 5 freelance employees

Size of space? Approximately 750sqft at £1017 per month

Electric Sunshine, Laura Mulvaney & Ian Cholerton



Electric Sunshine is a creative agency specialising in event production and engagement marketing. They help clients build relationships by creating experiences and campaigns that can help build and connect brands.

How long have you been here? Business was based in Shoreditch but it offered little benefit to business. Wood Green is ideal as they live in Hornsey, they can easily commute to see clients and have space for staff.

What would you like to see in the future to support you? There is a good rapport amongst businesses who share ideas and experiences on running small businesses. Karamel is the only 'social space' it would be good to have another space that can help support and encourage these conversations.

What are the strengths of Wood Green? The Mall is a valuable resource and the Market Hall is vibrant. The gasholder is a significant landmark from their window and enjoyed. Suggested it could be redeveloped akin to the 'Gashouder' venue in Amsterdam.

What are the weaknesses of Wood Green? It lacks polish and does not cater for 'the special'. There is a lack of green space and few places to spend time outside.

Size of company? Currently 3 people but may grow to 5. Rely on freelancers for larger commissions.

Size of space? Approximately 550sqft

Taxassist Accountants, Rukhsana Adam



Taxassist Accountants is a franchise business model forming a national network of accountants who help small business owners and self employed individuals with their tax and accountancy needs.

How long have you been here? Two years, although the decision to locate in Wood Green was somewhat forced and unplanned. The franchise required the business to be established in North London and preferred locations including Muswell Hill and Crouch End proved too expensive. Have since come to love the area having got to know local business owners through ventures such as the 'Business Lounge' in Wood Green Library.

What are your plans for future growth? The business is successful but Wood Green needs to do something to make me stay. The 'Creative Quarter' does not benefit the image of my business and there needs to be better and more professional commercial space to serve such businesses. The location is ideal but the available 'office stock' does not meet the business needs.

Is there anything missing from Wood Green? Yes, a business hub where people can go for networking and business advice. There is so much creative energy in the Creative Quarter which is unorganised and in need of support. Ideas and activity need to be translated into profit in order to generate a local economy and help grow the activity here.

Size of your space? Approximately 300sqft at £500 per month.

Benchmarking other London Metropolitan town centres

The GLA's Town Centre Health Check (TCHC) reports measure the performance of town centres that are classified in the London Plan.

Within the London Plan's typology of town centres, Metropolitan centres play a strategic, sub regional role. They serve wide catchment areas which can extend over several boroughs and further into the South East region. They typically contain at least 100,000 sq.m of retail floorspace and play an important role in providing comparison goods. These centres generally have very good accessibility and play significant employment, service and leisure functions.

The roles and function of town centres are assessed against a set of core indicators and broad thresholds. Those for the 2014 TCHC are set out below in Table 4.1.

Core Indicators	International	Metropolitan	Major	District
Total Town Centre Floorspace sq.m	240,000+	1000,000 - 500,000	50,000 - 100,000	10,000 - 50,000
Total Retail Floorspace sq.m	200,000+	85,000 - 500,000	35,000 - 85,000	6,000 - 35,000
Total Comparison Goods retail floorspace sq.m	180,000+	65,000 - 500,000	20,000 - 65,000	4,000 - 20,000
Comparison Goods retail floorspace as % of total retail floorspace	85% - 100%	75% - 100%	60% - 80%	33% - 60%
Convenience Goods retail floorspace as % of total retail floorspace	0% - 10%	5% - 15%	5% - 30%	10% - 30%
Leisure services sq.m	250,000+	20,000+	10,000+	2,000 - 10,000
Office floorspace sq.m	10,000,000+	70,000 - 10,000,000	40,000 - 70,000	2,000 - 40,000
Zone A Rentals 212 sq.m	4,000+	1,000 - 4,000	700 - 1,500	400 - 1,000
Public Transport Accessibility Level (PTAL) at centroid point	6	5 to 6	5 to 6	3 to 5

Source: TCHC 2014

Table 4.1 - Core Indicators and Thresholds of the GLA's Town Centre Health Check 2014

Wood Green

Wood Green is identified in the Further Alterations to the London Plan 2015 (FALP) as a Metropolitan Centre. When reviewed against the key TCHC measures, it appears to be performing at the lower end of the Metropolitan town centre thresholds. Wood Green's performance across key variables is compared to the range of results for all other Metropolitan Centres in Table 4.2 below, followed by commentary on each of these areas.

Core Indicators	Metropolitan town centre Thresholds	Wood Green 2014
Total Town Centre Floorspace sq.m	100,000 - 500,000	120,757
Total Retail Floorspace sq.m	85,000 - 500,00	90,397
Total Comparison Goods retail floorspace sq.m	65,000 - 500,000	68,702
Comparison Goods retail floorspace as % of total retail floorspace	75% - 100%	76%
Convenience Goods retail floorspace as % of total retail floorspace	5% - 15%	17%
Leisure services sq.m	20,000+	25,471
Office floorspace sq.m	7,000 - 10,000,000	NA (does not rank)
Zone A Rentals 212 sq.m	3,000 - 4,000	circa £1,500
Public Transport Accessibility Level (PTAL) at centroid point	5 to 6	6
Source: TCHC 2014		

Table 4.2 - Wood Green Statistics Compared to all Metropolitan Centres 2014

Scale and Function

Total Floorspace

Town centres are key locations for a diverse range of activities, including retail, leisure and office space as well as housing, social infrastructure and public open space. Total floorspace is defined in the TCHC as the sum of all comparison retail, convenience retail, service retail, vacant retail and leisure uses. Office floorspace, social infrastructure and other civic and community floorspace are excluded from the total town centre floorspace calculation as there is not sufficient robust data available for all centres. The twelve Metropolitan centres as defined in the latest London Plan (FALP) are:

- Bromley
- Croydon
- Ealing
- Harrow
- Hounslow
- Ilford
- Kingston
- Romford
- Shepherds Bush
- Sutton
- Uxbridge
- Wood Green

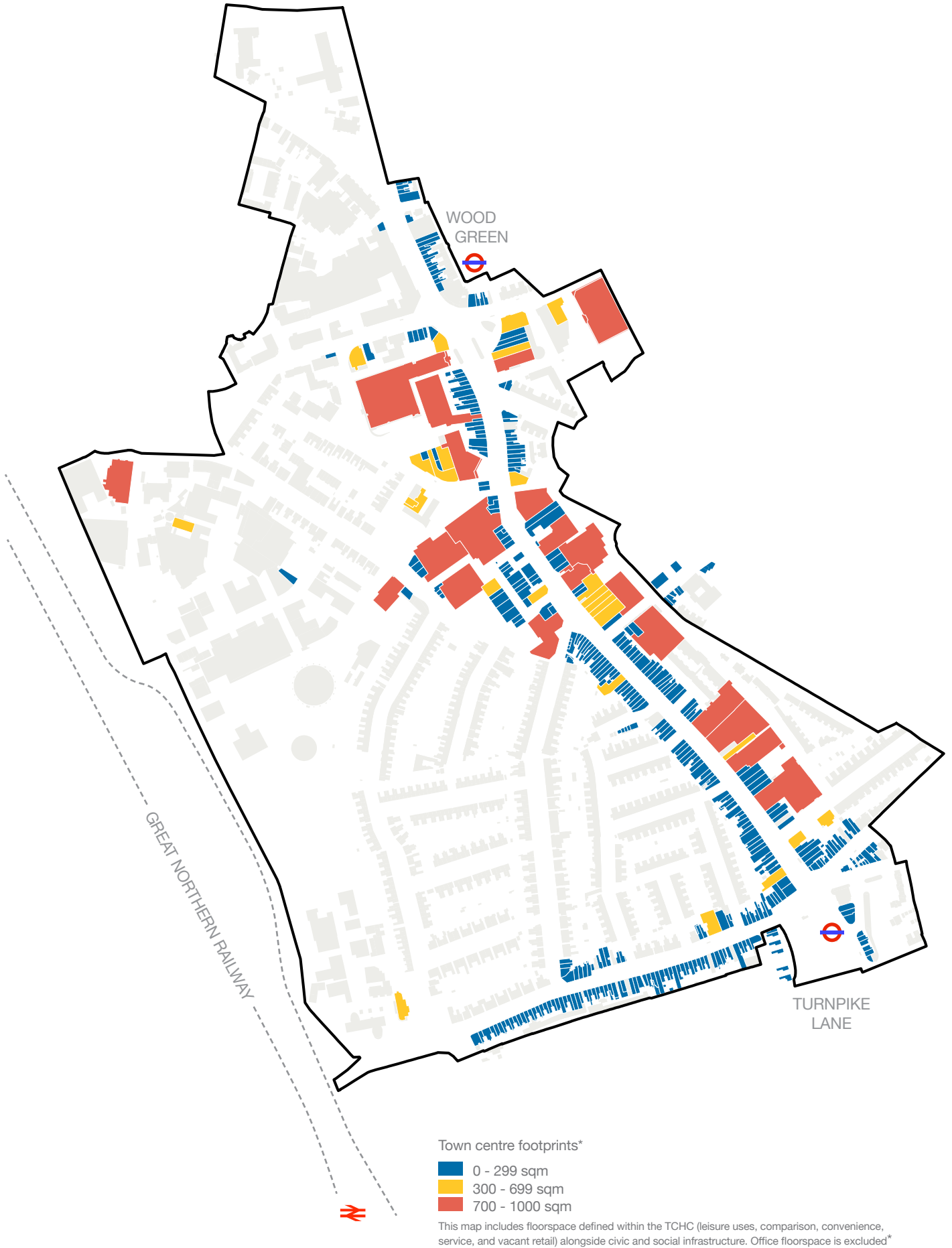
Table 4.3 below ranks London's Metropolitan Centres by total floorspace with Wood Green ranked tenth out of the twelve Metropolitan Centres.

The total floorspace in Wood Green fell by 3% between 2007 and 2012, possibly as a result of the difficult economic downturn. However, overall growth in total floor space occurred in 8 out of the 12 Metropolitan Centres including in Croydon and Shepherds Bush (the latter as a result of the opening of the Westfield Shopping Centre in 2008). This has resulted in Wood Green falling 3 places to 13th in the Town Centre Health Check's ranking of the large town centres, including Major and International centres, by floor space.

The adjacent map illustrates the building footprints found within the AAP boundary as defined within the TCHC including leisure uses, comparison, convenience, service, and vacant retail alongside civic and social infrastructure. Office floorspace is excluded. As expected the largest concentration of larger and medium sized floorplate retail can be found within the Mall where retailers including Primark, Morrisons and Lidl can be found. Further south towards Turnpike Lane there are four large floorplate spaces on the eastern side of the High Road, housing recognised names including Marks & Spencer and BHS. The western side has a much finer grain, constrained by its adjacency to a residential area to the west and characterised by smaller retailers occupying blocks with a typical terrace typology. To the south Morrisons, Gala Bingo, Wood Green Library and the former Gaumont Cinema each occupy significant plots.

2014 Ranking	Town Centre	Total Floorspace sqm	% Change Since 2007
1	Croydon	320,991	11%
2	Kingston	276,438	17%
3	Romford	207,025	15%
4	Shepherds Bush	197,232	302%
5	Sutton	159,635	3%
6	Bromley	156,712	0%
7	Ilford	145,860	-18%
8	Ealing	126,861	-1%
9	Hounslow	124,145	6%
10	Wood Green	120,757	-3%

Table 4.3 - London's Metropolitan Centres Ranked by Total Floorspace (2014) and % Change



Scale and Function

Retail

Retail is one of the key drivers of economic success, vitality and viability of town centres, providing jobs and convenient access to goods and services for customers.

The proportions of comparison goods, convenience goods and service retail floorspace provide an indication of a centre's role and function. Comparison goods retailers have a key role in Metropolitan centres, typically forming over 75% of total retail floor space. This is because Metropolitan centres generally serve a wide catchment area and have a strategic sub-regional role in providing comparison goods to the wider community. Comparison goods retailers draw more visitors to the area and generally provide a higher quality of retailing in the area greatly increasing the vibrancy of a high street.

As indicated in Table 4.4 the 75% benchmark has been easily achieved in Metropolitan centres such as Shepherds Bush and Croydon, where the percentage of comparison goods floorspace as a proportion of total floorspace is 89% and 85% respectively. At the highest end of the scale, 94% of all retail floorspace in Kingston is from comparison goods retailers. However, comparison goods account for only 76% of total retail floorspace in Wood Green where it falls at the lower end of the scale for Metropolitan centres.

The largest recent gains in comparison goods retail floorspace were at Shepherds Bush which benefitted from the opening of the new Westfield Shopping centre, whilst Wood Green recorded losses of comparison goods floorspace over the period since 2007 to 2012 (no floorspace data available).

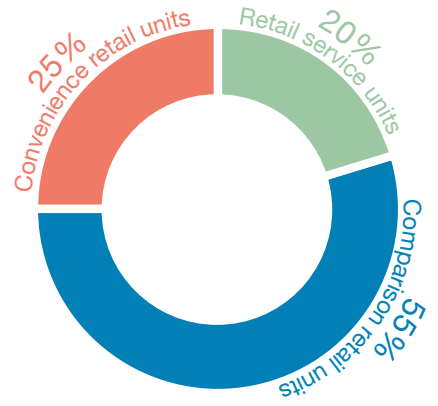


Marks and Spencer opened on the High Road in 1938 and has been one of the areas' most prominent comparison retailers

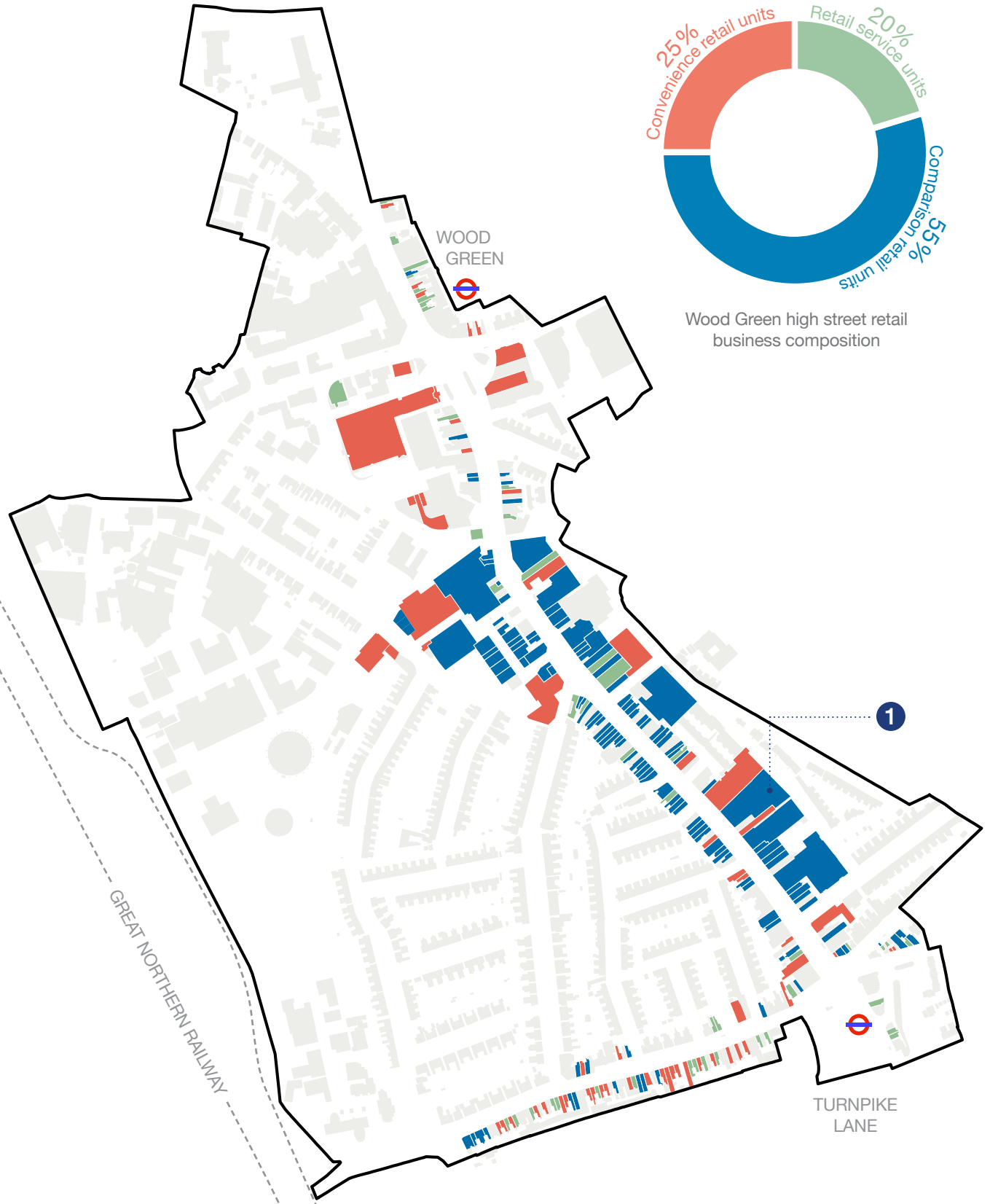
2014 TCHC Ranking	Metropolitan Centre	Comparison Goods Floorspace sqm	Comparison Goods Retail as % of Total Retail Floorspace
1	Kingston	206,480	94%
2	Croydon	176,361	85%
3	Shepherds Bush	130,027	89%
4	Romford	110,776	75%
5	Bromley	104,776	88%
6	Sutton	93,225	78%
7	Ilford	80,771	81%
8	Uxbridge	71,863	81%
9	Wood Green	68,702	76%
10	Hounslow	65,629	74%

Source: TCHC 2014

Table 4.4 - London's Metropolitan Centres Ranked by Comparison Goods Retail Floorspace (2014)



Wood Green high street retail business composition



High street retail uses at ground floor level*

- Comparison Retail (e.g. Clothing and footwear, furniture, jewellery, electrical goods, toys)
- Convenience Retail (e.g. supermarkets, convenience stores, butchers, bakers)
- Retail Services (e.g. dry cleaners, hairdressers, beauticians, travel agents)

*This map is based on individual business units. The Mall Market Hall is classed as one unit.

Scale and Function

Leisure

Leisure uses perform an increasingly important role in successful town centres, largely driven by restructuring in the retail sector and changing consumer habits with people increasingly seeking an enjoyable 'experience' from their trips to town centres.

Leisure floorspace comprises a range of activities including cinemas, theatres, concert halls, restaurants, cafes, takeaways, pubs, bars, and night clubs alongside a range of other facilities. A significant quantum and range of leisure facilities, or a cluster of leisure/night-time economy uses can be an important component of a town centre's function and vitality.

Metropolitan centres generally have a large amount of leisure floorspace however the proportion when compared to total floorspace is generally lower than in International, Major and District centres. Metropolitan centres play an important sub regional role in providing good quality leisure facilities for wide catchment areas.

Table 4.5 shows that Wood Green ranks 8th out of 12 by quantity of leisure space available. However, when viewing leisure floorspace as a percentage of total floorspace it is at the higher end of the scale compared to other Metropolitan centres. This indicates that the proportion of leisure floorspace is in keeping with expectations, though provides no detail on the quality of the leisure offer. Although leisure accounts for 21% of total town centre floor space in Wood Green, the amount of leisure floorspace contracted by 5% over the period of 2007-2012.

When analysing Wood Green's leisure provision on the basis of the total number of leisure facilities (76), Table 4.6 illustrates that in 2009 this was well below the levels in other more comparable sized town centres such as Sutton, Ilford and Bromley. By analysing the sub categories of leisure facilities, it is clear that the number of restaurants, pubs-bars-nightclubs and cafes present is the main area where Wood Green is lacking.

Figure 4.7 indicates that restaurants and cafés make up a lower percentage of leisure floorspace in Wood Green in comparison to the other Metropolitan centres. The mix of leisure facilities, in particular the proportion of restaurants when compared to takeaways or fast food outlets can help when determining the classification of the area.

Wood Green contains the highest proportion of takeaways (35%) compared to other Metropolitan centres. Areas with high levels of takeaways, fast food outlets, and betting shops are generally of a poorer quality. With the exception of Romford, where there appears to be similar numbers of restaurants compared to takeaways, the other Metropolitan centres contain a significantly higher portion of restaurants.

Restaurants and cafés play a vital role in the local economy and positively contribute to the vitality and viability of town centres. According to the data from TCHC 2014, restaurant and café floorspace across London's town centres increased by almost 28% from 2006-2012. With the exception of Wood Green and Ilford, the majority of Metropolitan centres recorded increases in A3 floorspace. This indicates a potential opportunity for Wood Green to focus on as it appears to be significantly behind other Metropolitan centres.

Croydon is ranked as one of the most successful Metropolitan centres, with 92 restaurants (42% of leisure facilities), offering a high level of consumer variety. This number will grow significantly with the addition of a new Westfield Shopping Centre when it opens in December 2018, as experienced by Shepherds Bush. Although not listed in the 2009 TCHC data on leisure, Shepherds Bush experienced the largest increase in the number of restaurant and café outlets, from 2009-2014, of all Metropolitan centres as a direct result of the new Westfield Shopping Centre.

According to data from the 2014 TCHC, the number of pubs and bars in all Metropolitan centres fell following the 2009 TCHC, with the largest decrease occurring in Croydon.

2014 TCHC Ranking	Metropolitan Centre	Comparison Goods Floorspace sqm	Comparison Goods Retail as % of Total Retail Floorspace
1	Kingston	46,395	17%
2	Croydon	44,779	14%
3	Romford	41,423	20%
4	Shepherds Bush	40,672	21%
5	Sutton	28,295	18%
6	Bromley	26,446	17%
7	Hounslow	25,699	21%
8	Wood Green	25,471	21%
9	Ealing	24,027	19%

Source: TCHC 2014

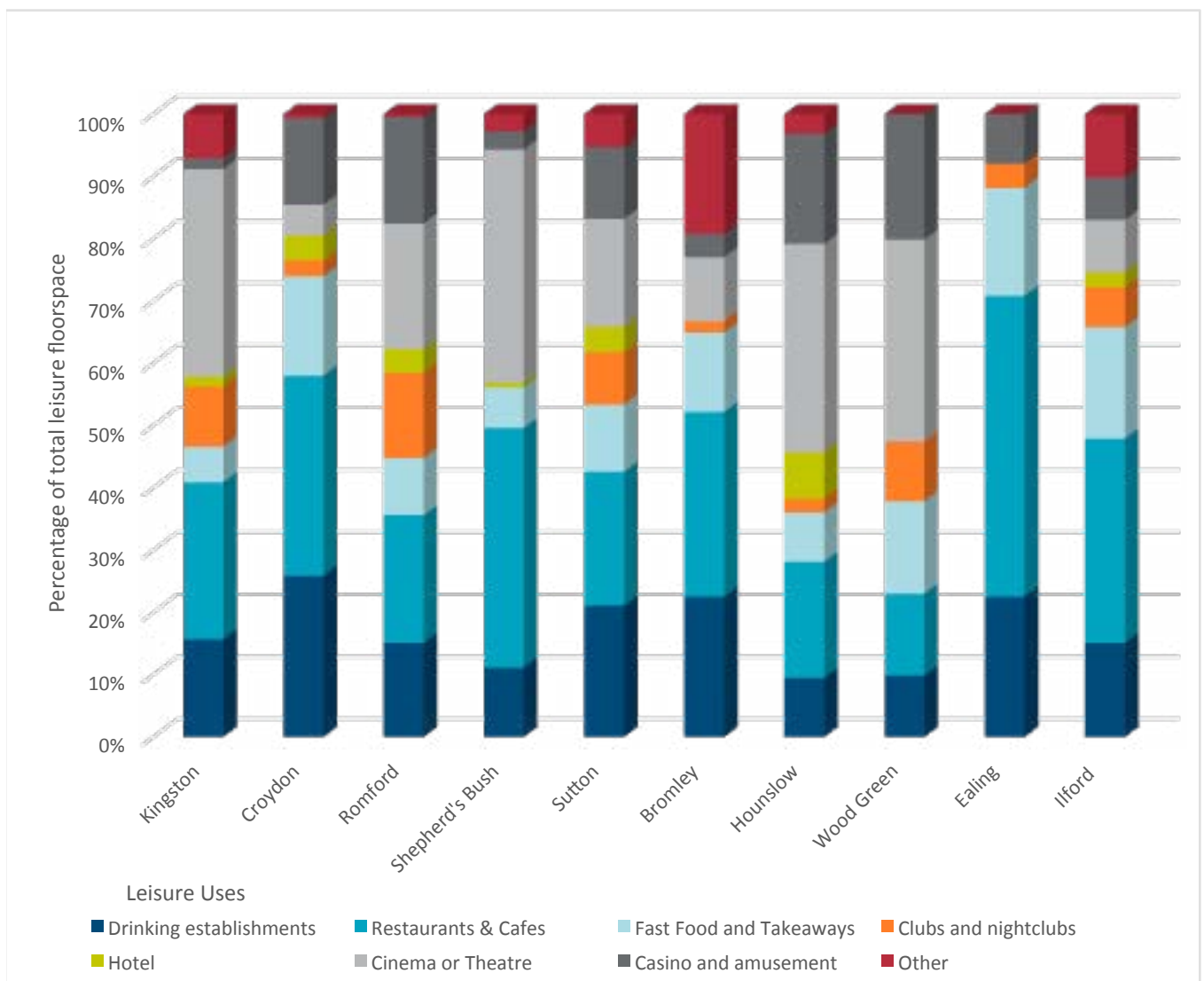
Table 4.5 - London's Metropolitan Centres Ranked by Total Leisure Floorspace 2014

Croydon	3	(1%)	92	(40%)	66	(29%)	52	(23%)	17	(7%)	230
Ealing	1	(1%)	64	(44%)	34	(24%)	28	(19%)	17	(12%)	144
Romford	1	(1%)	39	(33%)	37	(31%)	22	(18%)	20	(17%)	119
Kingston	2	(2%)	62	(53%)	19	(16%)	25	(21%)	9	(8%)	117
Sutton	1	(1%)	37	(36%)	31	(30%)	22	(21%)	12	(12%)	103
Ilford	2	(2%)	42	(43%)	28	(29%)	15	(15%)	10	(10%)	97
Bromley	3	(4%)	41	(49%)	16	(19%)	17	(20%)	7	(8%)	84
Wood Green	2	(3%)	22	(31%)	25	(35%)	10	(14%)	13	(18%)	72
Harrow	2	(3%)	34	(47%)	19	(26%)	9	(13%)	8	(11%)	72
Uxbridge	1	(2%)	22	(39%)	15	(26%)	12	(21%)	7	(12%)	57

Source: TCHC 2009

Table 4.6 - 2009 Data on Leisure Facilities in London's Metropolitan Town Centres

Figure 4.7: Breakdown of Total Leisure Floorspace in London's Metropolitan Town Centres (2013)



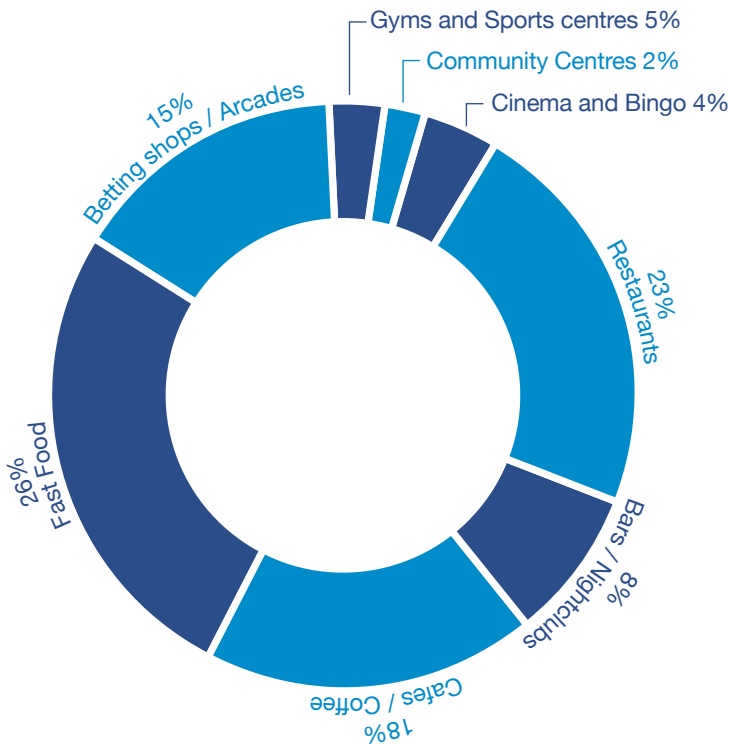
Source: TCHC 2014

Scale and Function

Leisure

This map illustrates all leisure space within the AAP/ IF area across a range of different use types including cinemas, restaurants, takeaways and bars or pubs. As previously noted, a leisure offer is an important component in a town centre's function and vitality and this map and supporting evidence provide more detail on the quality of Wood Green's leisure offer. Wood Green's cinema floor space is amongst the highest when compared with other Metropolitan centres but research has revealed that the Vue Cinema is used as a church at weekends to supplement income and perhaps questions the viability of the existing offer.

Fast food outlets and betting shops / arcades account for just over 40% of the leisure offer. Restaurants are seen as venues that provide waiter service with a mixture of independent and chain businesses occupying the High Road and locations such as the eastern side of the Mall. Although highly subjective, the general offer is skewed towards the lower end market with restaurants in a similar vein as Mosaica noticeably absent. Cypress House in the Creative Quarter is home to a number of private leisure facilities including Zone Gym, martial arts centres and Kidz Adventure Zone.



‘Of the leisure offer within the AAP area, betting shops and arcades account for 15% and fast food outlets 26% - evidence of its low grade nature’

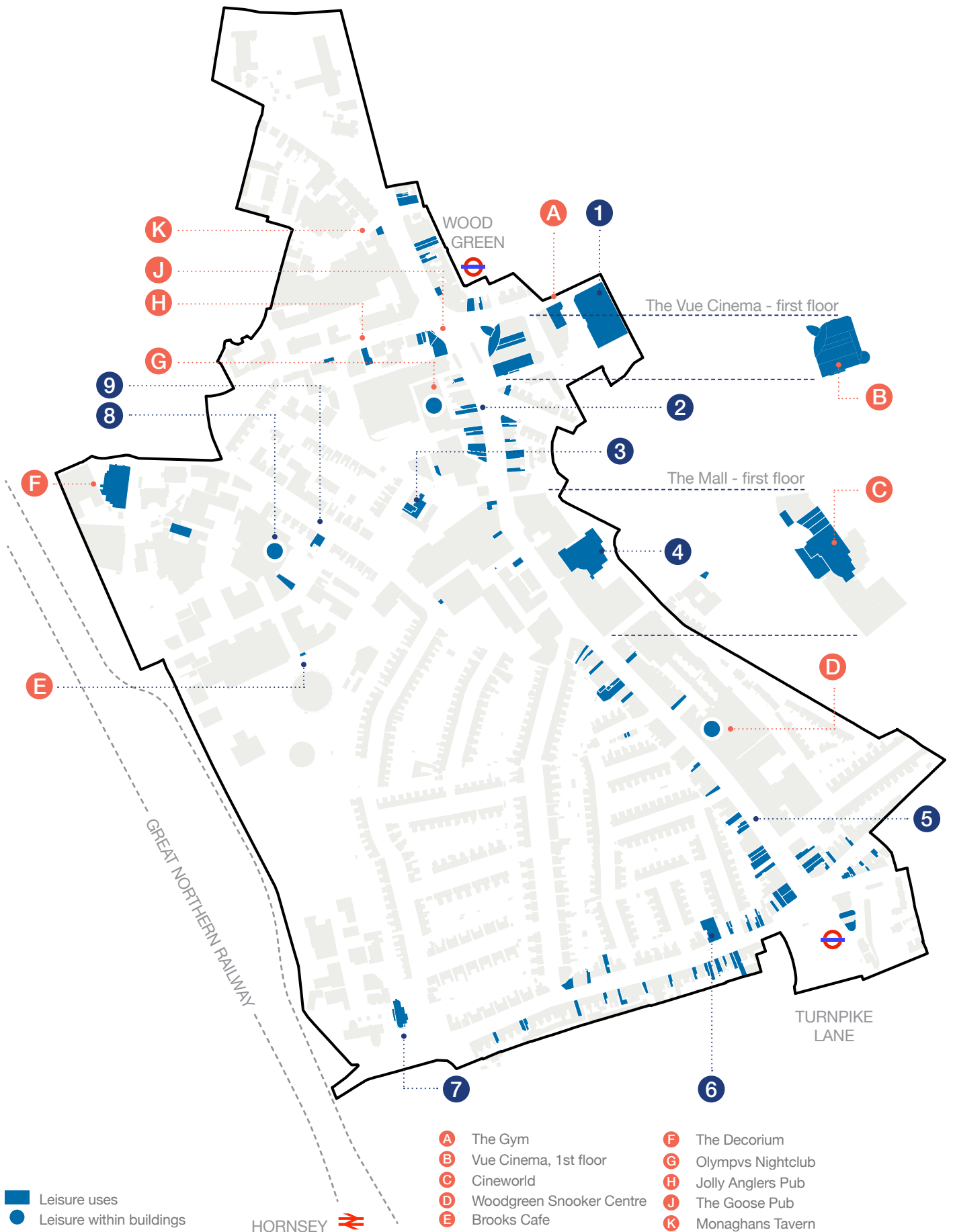
Percentage of leisure use types within the AAP area



Mecca Bingo on Lordship Lane



Betting shops are a common sight on the High Road





3 The Asian Centre on Caxton Road



4 Entrance to Easy Gym on the eastern side of The Mall



5 Fast food and take aways



6 The Toll Gate Pub on turnpike Lane



7 West Indian Cultural Centre on Clarendon Road



8 Gyms, sports facilities and childrens play centre within Cypress House

9



Scale and Function

Office

The scale, role and function of town centres are influenced by the scale and nature of commercial enterprises operating in the area. Office space is only viable in some Metropolitan centre locations.

Generally, the 12 Metropolitan centres and some Major centres, such as Canary Wharf, contain the largest estimated office floorspace in the town centre network. However, many Metropolitan centres have recorded a contraction in office floorspace driven by the permitted conversion of office to residential schemes. As can be seen from Table 4.8 below, office floorspace plays an important role in most Metropolitan centres, and also in a number of Major Centres.

As indicated in Table 4.8, Wood Green does not rank in the top 7 Metropolitan centres for office floorspace nor the top 15 for all town centres, with only 35,900 sqm of office floorspace. However, Ealing, a town centre that has ranked close to Wood Green in other key performance measures, has increased its amount of office floorspace by 9,154 sqm since 2008. Therefore there does seem to be an important role for viable office schemes in town centres. However, many Metropolitan centres that have experienced a surplus of office space have benefitted from reducing supply through Permitted Development rights office to residential conversion schemes. This has resulted in the net loss of 108,000 sqm of office space in London's town centres.

2014 Ranking	Town Centre	Office Floorspace sqm	Net Gains / Losses (2008-2012) sqm	Town Centre Classification
1	Canary Wharf	1,790,569	0	Major
2	Croydon	629,010	-6,351	Metropolitan
3	Hammersmith	327,305	0	Major
4	Camden Town	239,324	524	Major
5	Ealing	173,020	9,154	Metropolitan
6	Bromley	162,193	0	Metropolitan
7	Fleet Street	150,430	0	CAZ Frontage
8	Sutton	137,648	-2,610	Metropolitan
9	Uxbridge	135,625	-16,275	Metropolitan
10	Kensington High Street	133,054	-1,141	Major
11	Wembley	117,880	-3,220	Major
12	Harrow	108,844	-1,358	Metropolitan
13	Wimbledon	100,000	374	Major
14	Kingston	99,932	-6,271	Metropolitan
15	Richmond	94,139	-61	Major

Source: TCHC 2014

Table 4.8 - London's Town Centres Ranked by Quantity of Office Floorspace (2014)

Capacity

Capacity focuses on the ability of town centres to adapt to the changing needs of a population and provide opportunities for expansion and redevelopment to cater for projected growth. Housing has become of increasing importance by contributing towards the vitality of a healthy town centre. At the end of March 2014 there were currently 15,915 of net additional dwellings under construction on the edge of town centres and a further 21,369 units with planning permission but yet to start. Of the 21,369 units with planning permission 8% were on the edge of Metropolitan centres and Wood Green recorded the highest number of planned net additional dwellings with 1,250 net units. It was the only Metropolitan centre to feature on the TCHC ranking of the Top 20 town centres ranked by housing capacity from 'not started' planning permissions, ranking 5th. This indicates that Wood Green has the potential capacity to grow by accommodating a large number of dwellings around the town centre which would increase its vitality and viability

Financial Performance

The level and growth of turnover in a town centre is an important indicator of its health. They are vital to enable practitioners to derive robust estimates of retail sales densities, which help inform future retail expenditure capacity and floorspace requirements.

Comparison goods turnover is used to rank town centres and compare the performance of these centres as retail destinations.

Table 4.9 indicates that Shepherds Bush has the highest turnover from comparison goods retail, and achieves a turnover 320% higher than Ilford, which ranks 10th largest by comparison goods turnover. By contrast Wood Green is outside the top 10 Metropolitan centres for comparison goods retail turnover (no turnover data provided in TCHC report).

2014 Ranking	Town Centre	Comparison Goods Retail Turnover (£m)
1	Shepherds Bush	516
2	Kingston	432
3	Croydon	353
4	Bromley	301
5	Ealing	251
6	Uxbridge	239
7	Hounslow	235
8	Romford	198
9	Sutton	181
10	Ilford	160

Source: TCHC 2014

Table 4.9 - London's Town Centres Ranked by Quantity of Office Floorspace (2014)

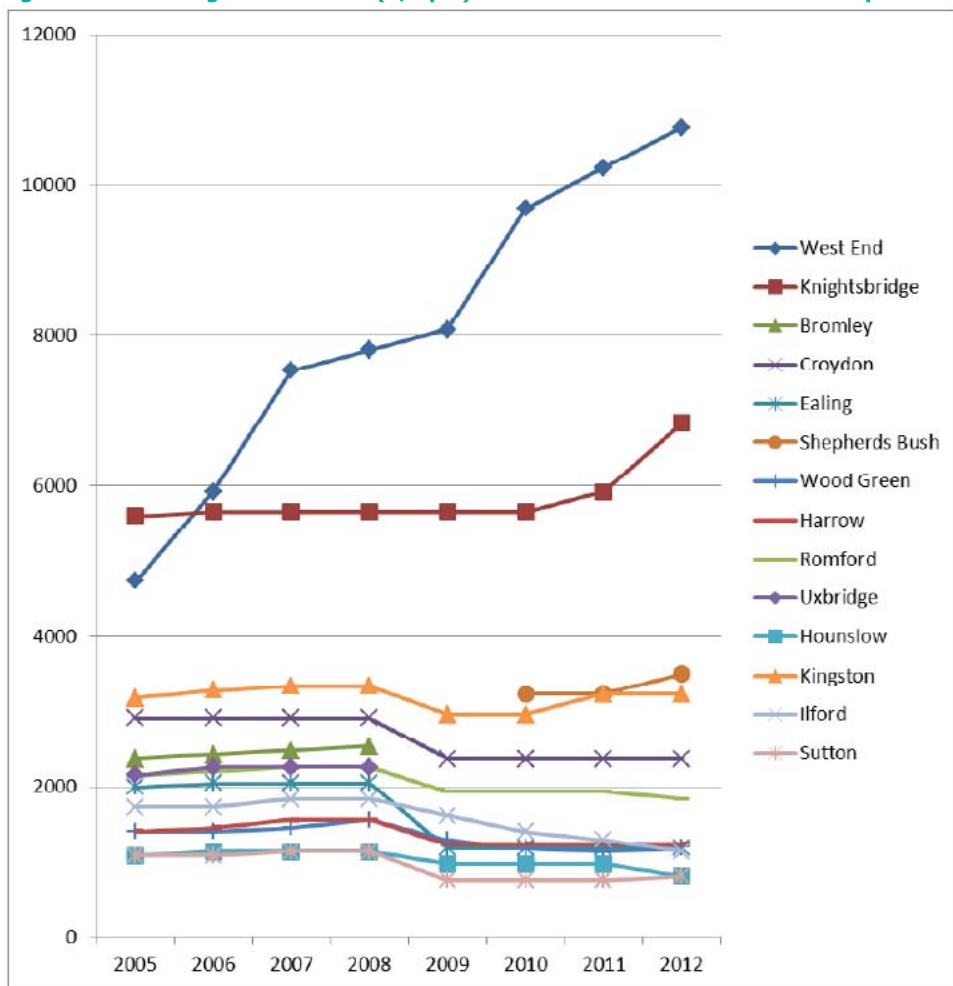
2014 Ranking	Town Centre	Rents 2014 (£ sqm pa)	% Change 2008-2009	% Change 2009-2010	% Change 2010-2011	% Change 2011-2012
1	Shepherds Bush	£3,498	NA	NA	0%	8%
2	Kingston	£3,229	-11%	0%	9%	0%
3	Croydon	£2,368	-19%	0%	0%	0%
4	Romford	£1,830	-14%	0%	0%	-6%

Table 4.10 - London's Metropolitan Centres Ranked by Annual Retail Rents (£/sqm)

Financial Performance

Figure 4.11 indicates how retail rents in Metropolitan centres in particular generally declined between 2008 to 2010 during the economic downturn and have since shown little rental growth whilst International centres have been resilient, however Shepherds Bush is the only Metropolitan Centre to experience growth in retail rents. Wood Green is characterised by annual retail rents at the lower end of the range for Metropolitan centres. From the graph, Wood Green has been achieving similar rental levels to Harrow and more recently Ilford. Whilst Hounslow and Sutton are in a lower rental band than Wood Green, Romford and Uxbridge Metropolitan centres appear to record rents approximately 30% or more higher. Kingston and Shepherds Bush record the highest annual retail rents at around £3,500 sqm, with the latter being the only Metropolitan centre to record noticeable rental growth since 2006.

Figure 4.11 - Average Retail Rents (£/sq.m) in London's International and Metropolitan Town Centres



Source: Colliers International

Accessibility

Town centres need to be highly accessible if they are going to perform their economic role and cater for a wide variety of people and businesses.

The quality of public transport accessibility greatly supports the health of town centres, allowing them to perform a wider role and draw expenditure from a larger catchment area. Public Transport Accessibility Level (PTAL) (2012) data is the key measure of public transport accessibility for London's town centre network.

According to the health check data, centres with the highest PTAL level 6 – including 6b - measure include all International and Metropolitan centres, CAZ frontages, 61% of Major centres and 18% of the District centres.

A high level of accessibility is vital if Wood Green is to maintain its designation as a Metropolitan centre. Alongside good public transport including two tube stations to the north and south and extensive bus network, the TCHC 2014 report notes that Wood Green should seek to incorporate a parking regime that balances the London Plan 2011 desirability of reducing car use, while recognising that many people will continue to use their cars as a means to travel to Wood Green. As Wood Green already achieves a PTAL rating between level 6a and 6b, it should ensure that public transport is maintained at this level and where possible improved further. The future arrival of Crossrail 2 would further significantly improve Wood Green's PTAL levels.

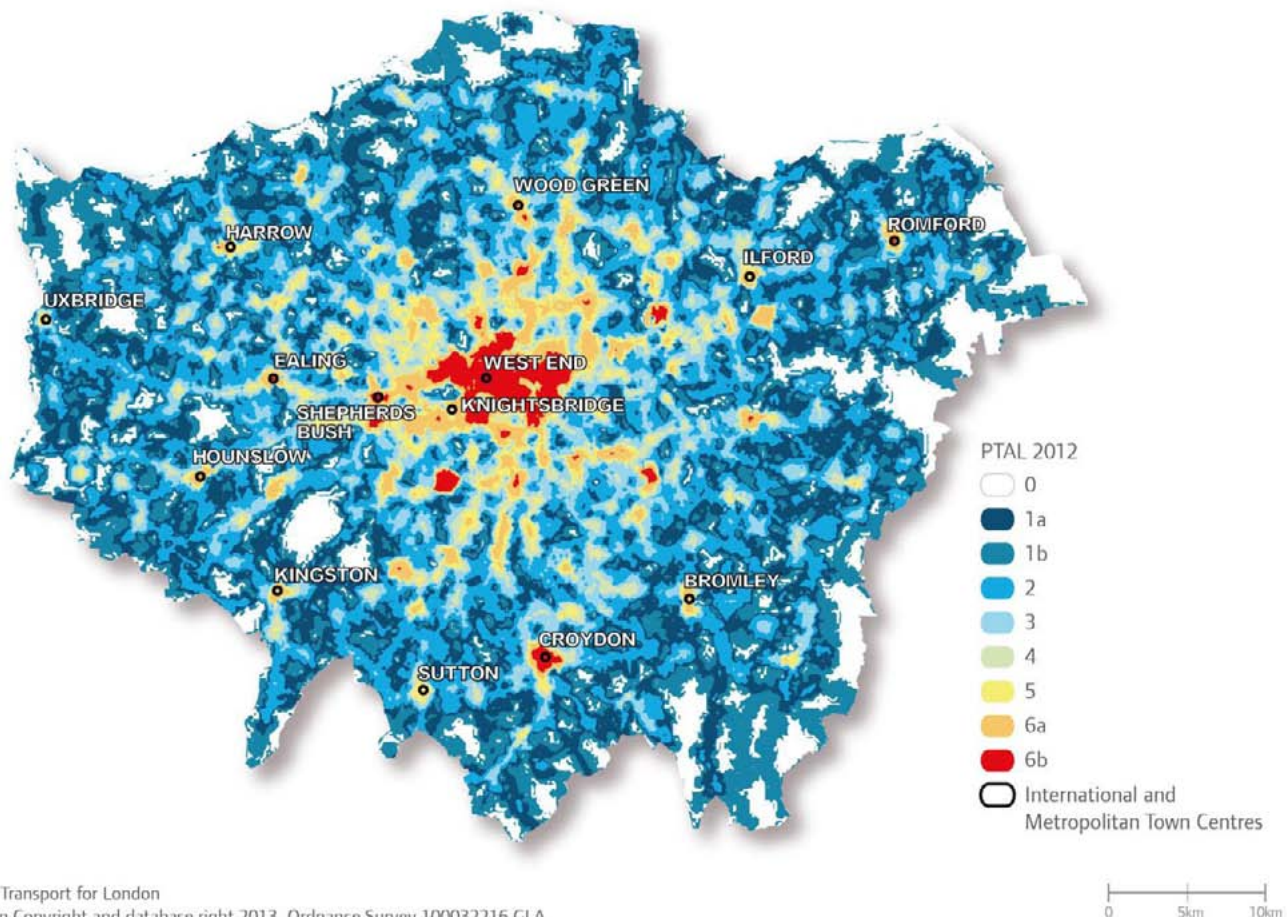


Figure 4.12 - London's PTAL Levels and Metropolitan Centres

Town Centre Initiatives

The Further Alterations to the London Plan (2015) states that boroughs should support and encourage town centre management, including the implementation of Business Improvement Districts (BIDs). Town centre strategies produced in partnership with the private sector, property owners, infrastructure agencies and the community are identified as a tool for effective management and promotion of town centres. Although the TCHC does not state which Metropolitan town centres have town centre strategies in place, the majority have town centre managers and strategies in place. The following Metropolitan town centres have BIDs:

- Croydon
- Ealing
- Kingston
- Ilford
- Sutton

Wood Green currently does not have a BID programme in place, however we understand that this is being explored by the Council.

Effective management and promotion of individual town centres can enhance their vitality and viability, with both public, third and private sectors and local community working together, pooling resources to achieve the best outcomes for a town centre. The majority of Metropolitan centres have town centre managers as well as town centre strategies which help to promote safety, security and environmental quality.

From the 2014 data, just under half of the Metropolitan centres have BIDs established. The Croydon BID was established in 2007, and renewed in 2012. It focuses on promoting cleaner and safer streets, enhanced accessibility and improving the image of Croydon. Since its implementation, the area has experienced a 10% reduction in overall reported crime and a 35% reduction in robbery.

Accidents and Environment

The Quality of Environment measure takes into account air quality, from the GLA's London Atmospheric Emissions Inventory, access to open spaces, conservation areas and heritage assets.

Wood Green was not ranked in the top 20 for all town centres for access to the highest quality of open space. This is a key area where Wood Green could seek to improve on to increase the number of visitors to the town centre and help protect its position as a Metropolitan Centre.

2014 Ranking	Town Centre	Pedestrian	Cycle	Public Vehicle	Private Vehicles	Total No.of Collisions
1	Ilford	26	7	11	101	145
2	Croydon	25	11	23	77	136
3	Wood Green	32	10	29	62	133
4	Shepherds Bush	33	30	13	52	128

Source: TCHC 2014

Table 4.13- Metropolitan Centres with the Highest Number of Collisions 2011

Conclusion

From reviewing the TCHC 2014 data, Wood Green is performing towards the lower end of the Metropolitan centre thresholds on key measures.

Wood Green is one of the smallest Metropolitan centres by total floorspace which is defined as the sum of all comparison retail, convenience retail, service retail, vacant retail, and leisure uses. In Wood Green the total floorspace contracted by 3% between 2007 and 2012.

Wood Green recorded losses in comparison goods retail floorspace over the period 2007 to 2012, falling to 76% of total retail. This is at the lower end of the range for all Metropolitan centres. Enhancing the quality of the retail mix towards more comparison goods will greatly improve Wood Green's retail offer. A key area for Wood Green to focus on is the quantity and quality of leisure facilities provided in the town centre, in particular the number of quality restaurants, pubs-bars-nightclubs and cafes compared to other leisure sub categories such as fast food and takeaways and cinemas-theatres-concert halls where it is well provided for.

Wood Green is characterised by annual retail rents at the lower end of the Metropolitan town centres.

Wood Green does not feature in the ranking for the top 7 Metropolitan centres for office floorspace indicating it is not an established office location other than for public sector occupiers.

Wood Green has the potential capacity to grow by accommodating a large number of dwellings around the town centre which would increase its vitality and viability.

Wood Green has particularly strong accessibility levels with an overall PTAL rating of 6 and the capacity to provide the projected future needs of the population, this will only improve should Crossrail 2 be delivered.

Finally, an attractive environment and good quality public realm contributes to an enhanced and more attractive experience for consumers. Wood Green was not ranked in the top 20 for all town centres for access to the highest quality of open space. This is a key area where Wood Green could seek to improve on to increase the number of visitors recognising that some streetscape improvements have been delivered in the town centre very recently.

Wood Green SWOT Analysis Arising from TCHC Review

Figure 4.14 provides a SWOT analysis summarising the key areas impacting upon the future designation of Wood Green as a Metropolitan town centre.

Strengths	Opportunities
<ul style="list-style-type: none"> • Wood Green has a high accessibility PTAL level of 6 – 6b. Further improved subject to the arrival of Crossrail 2 • Significant capacity for new residential around the town centre which will drive town centre vitality • Good level of cinema leisure provision with 2 on the High Road. • Good levels of parking provision 	<ul style="list-style-type: none"> • Significant capacity for new residential around the town centre. • Improve A3 and A5 leisure offer such as restaurants and cafes to drive footfall and dwell time. • Redevelop and/or refurbish existing retail blocks to provide modern retail offer meeting retailer requirements. • Create new and enhanced public space. • Improve connectivity with surrounding neighbourhoods • Establishment of a BID for Wood Green to drive safety, environmental and business improvements. • Comparatively low rents make it an affordable location for retail tenants.

Weaknesses	Threats
<ul style="list-style-type: none"> • Poor mix and quality of leisure facilities in the form of A3 and A5 contrasting with a high number of takeaways. • Low levels of comparison goods retail turnover and proportion of floorspace compared to other Metropolitan centres • Wood Green had the 3rd highest number of traffic accidents out of all Metropolitan centres in 2011.. • Poor town centre accessibility to the highest quality of open space • Low rental levels 	<ul style="list-style-type: none"> • No improvement in quality and mix of retail offer. • Loss of significant retailers in the town centre (such as Marks & Spencer as recently announced) and contraction of retail floorspace. • Competition from regional shopping centres such as Brent Cross and Westfield Stratford • Loss of Metropolitan town centre status. • No go ahead for Crossrail 2.

Figure 4.14 - Wood Green Metropolitan Status SWOT Analysis



L

NEW
OPEN

NEW
11

1498247252

11

90

Metropolitan Town Centre Examples of Success - Case Studies

Overview

DTZ has identified the three Metropolitan town centres as being successful on a number of key measures in the GLA's Town Centre Health Check and will be analysing the key factors that have played a key role in the town centre's success over the past economic cycle. The three Metropolitan town centres are:

- Croydon
- Shepherds Bush
- Ealing

Croydon

Croydon is the largest Metropolitan Centre in London with a total floorspace of approximately 320,000 sqm. This has grown by 11% over the past economic cycle, showing how resilient the centre has been during the economic crisis. It has a high proportion of Comparison Goods at 85% of total retail floorspace, which generated £353 million of turnover in 2014. It has an established secondary office base and a large town centre Business Improvement District (BID), consisting of 580 organisations over a number of sectors including retail, office, leisure, hospitality and the public sector, as well as a wide variety of leisure facilities.

A combination of factors is making Croydon town centre more attractive to business occupiers:

- Occupiers are being pushed out of Central London by increasing rents and lack of choice, looking for more affordable but well-connected space
- Improved transport links, with Central London and South East
- A reduction in office supply due to office to residential conversions resulting in improving rental values and new stock being built e.g. Ruskin Square.

Croydon was identified as an area for regeneration in the latest 2014 TCHC. It has undergone significant improvements over the past 5 years and has significant future retail and other development schemes in the pipeline in order to ensure that it continues to perform as one of the most successful Metropolitan centres competing against the fastest growing other Metropolitan centres of Stratford and Shepherds Bush.

We set out thematically the initiatives carried out by London Borough of Croydon which are the most relevant to the future regeneration of Wood Green.



East Croydon Footbridge by Hawkins / Brown



Proposed £1bn redevelopment of Croydon's Whitgift Centre
Image credit - Westfield Corporation

Working with Strategic Stakeholders

Numerous town centre improvement programmes have been delivered in partnership with strategic stakeholders such as Network Rail, Transport for London and the Greater London Authority (GLA). The benefit has been to ensure projects, in particular infrastructure, have been well coordinated in delivery with the result being leveraging a greater scale of improvement.

Connected Croydon Programme

Connected Croydon is a programme of coordinated public realm and transport improvements across Croydon town centre. The aim was to create an attractive environment that will secure inward investment into the town centre by creating a wide network of joined up public spaces with a high quality streetscapes that promote public transport, walking and cycling. Funding has been from a combination of sources including the borough Community Infrastructure Levy (CIL) and planning obligations. The borough also obtained £23 million of funding from the Mayor's Regeneration Trust and a further £3.29 million was secured from Local Implementation Plan (LIP) from TfL to spend on projects which support the Mayor's Transport Strategy.

Social Infrastructure

Improvements in Education

A priority of London Borough of Croydon has been to improve education provision in the town centre area in order to attract more families to live there. The Council identified huge demand from local families for new, high quality primary school places. Quality of education provision has a significant impact on the perception and attraction of an area to live for buyers and can lead to a premium being paid. This has had the effect of improving the viability of new residential schemes in an area and encouraging town centre living. Council interventions so far have included the expansion of a number of primary schools from one form entry to two form entry which has doubled the capacity of the schools.

- Forestdale Primary School – one form to two form entry allowing additional 30 pupils each year, September 2013
- Howard Primary School – one form to two form allowing capacity to double, August 2014
- Harris Primary Academy – new school taking 60 reception students each year, September 2014.

Over the next three years £96 million will be spent on expanding a further 8 schools. Funding was obtained from the Department for Education Fund for part of the improvements.

Scheme	Details	Delivery Date	Benefit
East Croydon Footbridge	<ul style="list-style-type: none"> • New pedestrian walkways and entrance into East Croydon Station 	2014	<ul style="list-style-type: none"> • Additional passenger capacity at the station entrance, reduced congestion, enhanced accessibility of the town centre and level access to the platforms.
Lansdowne Road	<ul style="list-style-type: none"> • New 350m pedestrian route into the station • Reduced road area at junctions to increase space for pavements for pedestrians 	2013	<ul style="list-style-type: none"> • Reduced traffic dominance and help to transform the town centre into an attractive place for living, working and socialising. • Increased accessibility from the station by providing a 24-hour accessible route through the central shopping area. • Improved pedestrian safety
Redevelopment of West Croydon Bus Station	<ul style="list-style-type: none"> • Improved lighting • More capacity passengers • Disable access • CCTV 	2016	<ul style="list-style-type: none"> • 20% increase in passenger footfall which to accommodate the anticipated increase in passengers from the new Westfield-Hammerson retail shopping centre • Safe and attractive environment to help encourage more occupiers, shoppers and residents to visit the town centre
South End Street Improvements	<ul style="list-style-type: none"> • New shop frontages alongside the restaurant quarter • Street clutter removal • New street furniture, tree planting, street lighting, signage and way finding • Relocated parking bays • Promotion of outdoor events e.g. South End Food Festival 	Late 2014	<ul style="list-style-type: none"> • Overall improvement in appearance of Croydon • A safer environment for pedestrians • Improved connectivity and accessibility

Table 5.1- Croydon Recently Delivered Infrastructure Projects

Delivery

Planning Policy

Croydon was designated an opportunity area in the Croydon Opportunity Area Planning Framework (COAPF), prepared by the Council and adopted in 2013. The COAPF plays a key role in promoting and supporting:

- 7,300 new homes, in particular promoting higher build densities within the OA
- The redevelopment of the retail core and revival of the high street
- The delivery of new infrastructure
- Locations for new office space
- Enhanced transport and parking capacity.

The COAPF makes the area more attractive to developers as there is an allowance for increased densities, and guidance development principles which increases the viability of developments.

The West Croydon Masterplan and Old Town Masterplan provide detail on new initiatives to be delivered which will realise the full potential of the town centre supporting its Metropolitan Status. It also enables a number of small interventions to be bound together in a single vision, helping to prioritise public space projects, creating a comprehensive regeneration strategy.

Use of Council CPO Powers to Deliver New Westfield

The Whitgift Centre and surrounding area is one of the most prominent features of Croydon town centre with limited coordinated investment in the area since the early 1990s. As a result, much of the retail provision is tired and no longer meets the needs of modern shoppers and occupiers. Over the past few years Croydon Council has been seeking, through its planning policies, to encourage the redevelopment and refurbishment of the area in a comprehensive way. In February 2014 the council granted outline planning permission and conservation area consent for proposals by Westfield and Hammerson to comprehensively redevelop the Whitgift Centre and surrounding land with a new retail and leisure destination in Croydon.

Core elements of the permitted scheme including 136,500 sqm of retail, 16,400 sqm of leisure, 1,900 sqm of offices and up to 600 residential new homes. Instead of developing separate competing developments, Westfield and Hammerson combined their land assets (as the Croydon Partnership) to deliver the scheme. Since formation the Croydon Partnership has sought to negotiate for the acquisition of all necessary land and interests in the development site. Despite acquiring some significant land interests, but it became clear that all the land and interests needed to implement the consented scheme are unlikely to be assembled by agreement within a reasonable timescale. To overcome this issue Croydon Council agreed to use its CPO powers. A CPO inquiry was held February-March 2015 and a Secretary of State decision confirming the CPO was awaited at the time of writing

Initiative	Scheme	Details	Date	Benefit
Use of Compulsory Purchase Order Powers	Westfield-Hammerson Development	<ul style="list-style-type: none"> CPO for Croydon Westfield development 	2019	<ul style="list-style-type: none"> By facilitating the comprehensive land assembly for the scheme and removing third party rights, the Council is providing certainty to the developers and speeding up delivery of the preferred scheme. This will potentially realise the comprehensive benefits of the scheme for Croydon town centre sooner.
Use of Council Funds and Public Borrowing	Boxpark	<ul style="list-style-type: none"> £3 million loan from the Council's Revolving Investment Fund to Boxpark. Public borrowing Boxpark Croydon will be a temporary retail offer made from shipping containers 	2016	<ul style="list-style-type: none"> It offers a unique shopping experience not found in conventional shopping areas, attracting cutting edge brands who want to engage differently with their audience. Brings new jobs, attracts visitors and draws in customers and new businesses from across the South East to Croydon. Boxpark will help to promote the new Ruskin Square commercial-led development.
Town Centre Management	Croydon BID	<ul style="list-style-type: none"> Business Improvement District (BID) set up by Croydon Council consisting of 580 organisations operating over a number of sectors: retail, office, leisure, hospitality and public sector 	Set up 2007	<ul style="list-style-type: none"> Businesses pay 1% of rateable value as a BID Levy each year to fund a number of improvements within the BID district area including: <ul style="list-style-type: none"> a. Cleanliness and appearance, including three day a week cleanse of streets, planting schemes and public art displays b. Safety and security, including funding for extra police and CCTV c. Enhanced accessibility and way finding d. Events programme improves the perception and acts as a draw to the town centre e. Since implementation a 10% reduction in overall crime and 36% reduction in robbery.
Use of Council Land Assets - Local Asset Backed Vehicle (LABV)	Croydon Urban Regeneration Vehicle (CCURV)	<ul style="list-style-type: none"> 28 year 50:50 partnership between Croydon Council and John Laing 	2008	<ul style="list-style-type: none"> Delivery of the Council's regeneration ambitions by bringing together: <ul style="list-style-type: none"> a. The Council's land assets b. John Laing's equity funds and development expertise. Key projects delivered include Bernard Weatherill House (new Council offices), the new BREEAM excellent rated Council offices completed in 2013, and the redevelopment of the former Council offices Taberner House into a high quality residential scheme.

Table 5.2- Croydon Council-Led Initiatives

SME Business Initiatives

Croydon Council have set up a number of incentives, funded by the Connected Croydon Programme, such as the West Croydon Investment Programme, in order to attract Small and Medium Enterprises (SMEs) into Croydon Town Centre.

Initiative	Scheme	Details	Benefit
Use of Compulsory Purchase Order Powers	Croydon Enterprise Loan Fund (CELFF)	CELFF is managed by Croydon Council and offers business loans to: <ul style="list-style-type: none"> Start-ups (trading for 12 months or less) value of: £1,000 to £5,000 Existing Businesses (trading for more than 12 months) value: £2,000 to £25,000 	<ul style="list-style-type: none"> Interest on the loans are charged at a competitive lending rate. No additional fees and no penalties for early repayment. Reduced lending costs and flexibility encourages the establishment of new businesses and existing SME businesses into the town centre.
	West Croydon Investment Programme (WCIP) – West Croydon Enterprise Hub	<ul style="list-style-type: none"> Part of the Connected Croydon Programme Funding from the Mayor’s Regeneration Fund to support new businesses and the creation of an ‘Enterprise Hub’. The Hub is operated through a partnership between private, public and third sector parties. 	<ul style="list-style-type: none"> Achieves Council’s vision for Croydon to become a centre for entrepreneurial business development and technology, attracting businesses, creating new jobs and promoting growth and investment. The Hub provides an onsite outreach service to support local businesses offering mentoring, business and start-up training, leadership and HR/legal advice.
Business Rates Relief Scheme	West Croydon Investment Programme (WCIP)	<ul style="list-style-type: none"> Includes a £1 million business rate relief scheme offering new and existing businesses up to 100% relief for a year as part of the Croydon Business Support Package New businesses are able to claim a discount of up to 65%. 	<ul style="list-style-type: none"> To encourage growing businesses with a particular focus on technology and creative industry sectors to relocate into the Croydon Opportunity Area and town centre as well as help nurture new and existing local SMEs.
High Streets Improvement and Retail Support Package	London Road and South End Activation projects	<ul style="list-style-type: none"> Part of larger retail support package offered by Council with support from European Regional Development Fund (ERDF). Businesses are provided with fitted out (previously vacant) premises designed around their business needs. 	<ul style="list-style-type: none"> The package helps support and attract SME retail businesses to the area and improves the vitality of the high street as vacant units come back into use.
Free support for SMEs	Build to Compete 2	<ul style="list-style-type: none"> Funded by Croydon Council and ERDF. Its purpose is to open up supply chain and procurement opportunities to SMEs based in Croydon by offering free networking events, support and advice. 	<ul style="list-style-type: none"> Helps SMEs grow by giving them access to and winning new business opportunities in the public and private sector, not be available to them, encouraging more to locate in the area The public sector benefits from more competition bidding for works and services, and improving supplier diversity.

Cultural Initiatives

Scheme	Details	Benefit
Platform @ Ruskin Square	<ul style="list-style-type: none"> Community space linking the new pedestrian bridge and Ruskin Square Hosts events such as World Food Market, pop-up performances and television screens showing popular events such as Wimbledon 	<ul style="list-style-type: none"> The platform acts as a showcase for local talent, space for festivals and events as well as creating a cultural draw to the town centre The space increases dwell time and supports the night time economy, in particular food and beverage businesses.
Surrey Street Food Hub	<ul style="list-style-type: none"> Part of the High Streets Improvement and Retail Support Package The Council gave seven street food traders £3,000 and free premises for 6 months in an enclosed space for food related businesses to trade, with a demonstration kitchen and evening food promotions in Surrey Street Provides culinary training courses and a wide range of food related activities. 	<ul style="list-style-type: none"> Creates a focal point and draw to the area, encouraging networking and a sense of community. The Food Hub attracts local people living in the area and also visitors increasing dwell time The scheme lasted 6 months, closing May 2015, however the Council are considering similar events in the Platform @ Ruskin Square.



Surrey Street Food Hub



South End Activation, high street improvements by Hassell Studio

Summary of Key Areas Where Wood Green Could Learn from Croydon

- **Leisure Initiatives** - Croydon Council have focussed on leisure-led initiatives such as the Surrey Street Food Hub. The Council offered free premises in Surrey Street Market for 6 months and £3,000 start-up initiative to a number of street food traders. The Council's aim was to attract more visitors to the town centre, raising its profile as a food destination, add vitality and encourage similar businesses to the area.
- **Supporting SMEs** - The Council have funded a programme of pop-up shops in vacant retail units as part of their high streets improvement and retail support package and implemented a number of incentives to support new and existing Small to Medium Enterprises (SMEs), encouraging them to locate to the town centre through initiatives such as the Business Rates Relief Scheme and free business support and advice.
- **Improving Connectivity** – Physical public realm connectivity improvements have been delivered alongside a number of coordinated street and public realm improvements as part of the Connected Croydon Programme set up by the Council to improve the attractiveness of the area and create linked up public spaces and greenways improving accessibility to the area.
- **Utilising Public Sector Assets and Delivering New Council Accommodation** – Croydon Council set up the CCURV to facilitate the delivery of the new development in the town centre including new Council accommodation. The London Borough of Haringey (LBH) has significant land assets in and around Wood Green which can facilitate redevelopment across the town centre, including a requirement for new office accommodation. A strategy is currently being developed for a delivery vehicle to manage all of the LBH's land assets.
- **Enhancing Schools Provision** - The Council identified huge demand from local families for new, high quality primary school places. Quality of education provision has a significant impact on the perception and attraction of an area to live for buyers and can lead to a premium being paid. Council interventions may include for example improving the capacity of the schools.
- **Improvements to Existing Public Transport** – Working with Network Rail, the Council has improved access to East Croydon station by delivering a new pedestrian footbridge, entrance and improvements to increase capacity in the station.
- **The Importance of a Supporting OAPF** - Croydon was designated an opportunity area in the Croydon Opportunity Area Planning Framework (COAPF) and adopted in 2013. The Croydon's OAPF plays a key role providing a strategic overarching planning framework that promotes the renewal of the town centre. By contrast Wood Green (including Haringey Heartlands) is defined in the London Plan as an Intensification Area. We understand Haringey Council is exploring the potential for Wood Green to be designated an Opportunity Area.
- **Utilising Council CPO Powers to Support Land Assembly.** Croydon Council in partnership with Westfield and Hammerson agreed to use their CPO powers to acquire the residual land ownerships needed to deliver the new Westfield scheme. Without the use of the CPO, it is unlikely that the full intended scheme could be realised and/or in the timescales required.

Shepherds Bush

Shepherds Bush, located in the London Borough of Hammersmith and Fulham (LBHF), is a newly designated Metropolitan centre which has experienced one of the most significant improvements in town centre health in London in the past 10 years as defined by key TCHC measures. The completion of the Westfield Shopping Centre in 2008 elevated the town centre's status from a District town centre to a Metropolitan centre following the London Plan Town Centre Health Check 2009. Westfield has brought a dramatic increase in footfall and is now the dominant retail feature of the area, increasing the total floorspace by 302%. It is now the 4th largest Metropolitan centre in London. 89% of retail floorspace in Shepherds Bush is occupied by comparison goods retailers, a key indicator of the TCHC. The centre was ranked the top Metropolitan Centre for turnover from comparison goods and achieves the highest retail rents.

The 2014 Town Centre Health Check identified future potential for Shepherds Bush to be reclassified as an International town centre.



Shepherds Bush Westfield, internal and external views

Accessibility

Infrastructure Improvements

The Council asked residents and commuters on their views on transport within the borough. The aim was to make improvements tailored to the needs of the people. LBHF then implemented a number of traffic improvements investing £170m in funding consisting of developer S106 contributions and the LBHF's own funds, with an additional £30m from Transport for London.

Westfield London played a crucial role in the success of Shepherds Bush in the past economic cycle. The site has become a retail anchor serving a wide catchment area and has been the catalyst for major regeneration. Through S106 Negotiations the developer, Westfield Group, agreed to improve the transport network for the surrounding area, helping to accommodate the anticipated increased pressure on existing facilities as a result of the increased footfall the development would attract. The S106 agreement for Westfield London levered £170 million into transport infrastructure improvements.

S106 agreement benefits from Westfield Centre have also delivered other benefits to the town centre community including a new library and refurbished Shepherd Bush common.

New buyers in the area were up 13% and the area has become more desirable to retail occupiers and visitors with the Westfield Centre drawing 23 million visitors in its first year. This success has highlighted how leveraging private sector investment can deliver significant infrastructure improvements which will support Shepherds Bush town centre for many years to come as well as future development where there is a significant residential and retail pipeline around the town centre. Forthcoming developments include Stanhope's Television Centre redevelopment, £1bn further extension of Westfield and Shepherds Bush Market.

Scheme	Details	Date	Benefit
New Shepherds Bush Overground Station	<ul style="list-style-type: none"> New Overground station on West London Line designed and funded by the Westfield Group as part of S106 redevelopment contribution. Included the provision of an integrated bus interchange and interchange with the London Underground Central Line Station. 	Completed September 2008	<ul style="list-style-type: none"> Fully accessible new station on existing Overground line provides additional connections to transport system, improving public transport capacity and town centre accessibility Shepherds Bush now has a PTAL level 6.
New Wood Lane Tube Station	<ul style="list-style-type: none"> Contributions from the developer aided the construction of the new underground station on the existing Hammersmith and City line 	2008	<ul style="list-style-type: none"> Increased capacity and accessibility accommodating for the increased volume of passengers resulting from the Westfield Shopping Centre opening.
Barclays Cycle Hire Scheme	<ul style="list-style-type: none"> LBHF contributed £2 million towards the scheme using Section 106 funding New cycle lanes and 4 new routes 7 new local cycle hire docking stations supporting arrival of 1,700 bikes for LBHF borough 	December 2013	<ul style="list-style-type: none"> Improved cycle accessibility around the area, attract more visitors. Promotes more sustainable and greener mode of transport
Wood Lane Bus Station	<ul style="list-style-type: none"> New bus transport hub located next to the new Wood Lane Tube Station. 	2008	<ul style="list-style-type: none"> Provide extra bus capacity for commuters and visitors to the area, as well as connectivity to Westfield and other public transport modes.

Delivery

Compulsory Purchase Order

Shepherd's Bush Market has been running for 100 years and at its peak in the 1980's had over 200 businesses trading. However over the subsequent decades the Market has visibly declined in size, performance and condition. The Market is considered by the Council to be a vitally important component of Shepherd's Bush and believes that its under performance has a detrimental impact on the economic and social performance of the town centre as a whole.

In 2012, the LBHF granted planning permission to Orion Shepherd's Bush Market Ltd to redevelop the site and adjoining land, including refurbishing and widening the Market - providing more larger pitches, improved lighting and security, new toilet facilities, public square in front of a relocated Bush Theatre - and constructing new buildings of up to nine storeys to provide up to 212 residential units plus more than 14,000 sq m of non-residential floorspace. The freehold is mostly owned by Transport for London, however, there were a large number of third party interests to be acquired. Following the grant of planning permission, LBHF made the CPO to acquire the third party land not already owned by TfL and Orion. Without the CPO it is unlikely the delivery of the plans to regenerate the Market could be realised within a sufficient timescale and maximising the regeneration benefits.

Once completed the redevelopment will attract a broader range of visitors to the area, providing a retail offer differentiating from Westfield whilst leveraging private sector investment, provide 200 new homes to the area and act as a further catalyst for regeneration of the town centre

Supportive Planning Policy

Shepherds Bush is located within White City Opportunity Area (WCOA). White City was identified as an Opportunity Area in the 2004 London Plan. The White City Opportunity Area Planning Framework (WCOAPF) was adopted in 2013.

WCOAPF provides an indicative masterplan of how the area deliver 10,000 jobs and 5,000 new homes. It identifies capacity to cater for a range of commercial uses, focussing on creative industries, biotechnology, retail and entertainment.

The London Plan 2011 sets out that WCOA, including Shepherds Bush, could accommodate a minimum of 5,000 new homes and has an employment capacity of 10,000 jobs. The WCOAPF's land use strategy identifies and prioritises providing employment space for creative, academic, technology and SME sectors. The main areas identified as opportunities include:

- Research and development led by small start-up firms
- Production, broadcasting and entertainment
- Fashion design and retail headquarters, linking with proximity to Shepherds Bush Market fabric shops.

The WCOAPF also states that there should be investment in key sites such as Shepherds Bush Market, the West 12 Centre and the town centre should be focussed on retail, arts, cultural and leisure including a focus on driving the night time economy. The Opportunity Area status has been useful to developers as it sets out the Council's vision, identifies the development opportunities and parameters, encourages increased building densities and sign posts where infrastructure investment may be needed.

Social Infrastructure Improvements

Scheme	Details	Date	Benefit
Shepherds Bush Green	<p>£2.6 million refurbishment of the Green. Includes:</p> <ul style="list-style-type: none"> • 2 new play areas for children • Enhanced landscaping • Improved access routes across the square for pedestrians and cyclists 	May 2013	<ul style="list-style-type: none"> • Improved the attractiveness of the area for families and visitors, increasing dwell time, boosting the local economy and attracting further investment • Enhanced perception of safety
Shepherds Bush Town Centre West	<p>Funding from the Council, developer contributions and TfL for:</p> <ul style="list-style-type: none"> • Upgrade and redesign pathways • Improve and addition of pedestrian crossings • Cycle lanes • Upgraded street lighting • Tree planting and pocket plants • New public space in front of University of the Arts London 	March 2016	<ul style="list-style-type: none"> • Improve accessibility for pedestrians and cyclists, making the centre more sustainable and offering a more attractive environment which will help attract further development and investment. • Enhanced perception of safety • Reduction in traffic collisions, a measure on the TCHC
Chroma Vision CCTV	<ul style="list-style-type: none"> • New CCTV installed around Shepherds Bush Metropolitan centre funded by s106 agreement between LBHF and Westfield Group 		<ul style="list-style-type: none"> • Since installation crime has fallen by 10%. The improvement in safety has been a key factor in making the area more desirable and attractive to visitors, supporting the evening economy.
Additional Police Officers	<ul style="list-style-type: none"> • Funded by contributions from the Westfield Group 		<ul style="list-style-type: none"> • Helps visitors and residents feel safe, reduces crime rates and increases the attractiveness of the destination

Through further expansion of Westfield the s106 agreement will realise the following benefits:

- £12.25 million towards White City Opportunity Area initiatives, including public realm improvements
- £7 million towards additional public transport infrastructure improvements, including increasing bus capacity as well as road improvements
- £600,000 towards new local jobs and training initiatives.

Cultural Initiatives

Scheme	Details	Date	Benefit
Bush Theatre	<ul style="list-style-type: none"> Relocation of the theatre into the former library building 	2011	<ul style="list-style-type: none"> Larger facility which acts as a cultural anchor, the scheme involves a café, to attract an increased number of visitors. The council are also proposing to introduce 'feature' high quality paving on the pavement outside the theatre
Shepherds Bush Library	<ul style="list-style-type: none"> Relocation of old Library from Shepherds Green and integrating it into the Westfield Development, split over two floors containing the latest technology, chill-out space and children's activities 	2008	<ul style="list-style-type: none"> This scheme was delivered by Westfield London and has seen a 700% increase in membership, 50% visits increase compared to old library, 45% increase in book loans, inclusion of a Work Zone – local recruitment service and work skills training. The increased community facilities in the area, further encourage more residents into the town centre and increases dwell time.



Entrance to Shepherds Bush Market



Shepherds Bush Common refurbishment

Summary of Key Areas Where Wood Green Could Learn from Shepherds Bush

Whilst it is clear that the regeneration and improved performance of Shepherd's Bush has benefitted from major external investment in the form of Westfield at a scale that will not be replicated at Wood Green, there are nonetheless numerous initiatives that have been implemented in Shepherds Bush that could improve the town centre health of Wood Green:

- **Public Transport Improvements** – LBHF's main focus prior to the opening of Westfield London was to improve the public transport connectivity in the town centre and provide additional capacity to serve the new shopping centre. In the long term, Crossrail 2 provides the opportunity to support comprehensive development across Wood Green town centre. In the short to medium term Haringey Council should focus on driving connectivity and capacity improvements from the existing network with stakeholders such as TfL.
- **Good Quality Public Spaces** - LBHF have also focussed on implementing a number of initiatives aimed at improving the safety and perception of the town centre such as installing CCTV, upgrading lighting in public spaces and funding additional police officers.
- **Pursue Opportunity Area Planning Status (OA) for Wood Green** - To set out the Council's vision, identify key development opportunities, where increased building densities would be acceptable, what infrastructure and public realm investment is needed and obtain the buy in of the GLA through formalising the Opportunity Area Planning Framework (OAPF) in the London Plan. OAPF's generally provide a greater level of detail than Area Action Plans which are the key planning documents for Intensification Areas. Delivery of an OAPF will require developing a more detailed business case for the viability and feasibility of comprehensive redevelopment of Wood Green town centre building on the work of the WG Investment Framework (WGIF). OAs are considered by the GLA to have potential for at least 5,000 jobs or 2,500 new homes or a combination of the two, along with other supporting facilities and infrastructure. These will be key factors in determining whether Wood Green is a suitable candidate for OA designation.
- **Deliver Social and Cultural Infrastructure Improvements** - New social infrastructure such as libraries, security improvements, cultural assets such as theatres and new public space make a big contribution towards making town centres places that people want to visit and use. In Wood Green a coordinated strategy for the delivery of these needs to be embedded in the short, medium to long term proposals for the town centre going forward.
- **Through the use of the Council's CPO powers** LBHF demonstrated how it can play an important role in facilitating land assembly to enable large scale redevelopment to take place. By using these powers Haringey could realise a much more likely that a greater scale of redevelopment, within a more certain timescale can be realised. What about the Council using powers such as CPO (as in Shepherd's Bush to deliver the market scheme) to deliver independent retailers alongside additional resi etc?

Ealing

Ealing Metropolitan town centre performed particularly well in turnover from Comparison Goods in the 2014 TCHC ranking 5th. Ealing is also characterised by a high amount of office floorspace, ranking 2nd, after Croydon in the 2014 TCHC. However, it did not score as well in total floorspace requirements or retail rents.

In the 2008 Spatial Development Framework, part of the Local Development Framework, Ealing Council identified Ealing Metropolitan centre as the principal focus for shopping in the London Borough of Ealing. It also identified a number of weaknesses which could threaten the future prosperity of the centre including:

- Range and quality of retail, leisure, arts and community facilities
- Quality of pedestrian environment
- Quality and capacity of arrival points into the town centre
- Quality and efficiency of interchange between different modes of public transport
- Levels of traffic congestion
- Lack of clear identity and image
- Perception of crime associated with night time activity

Many of these points were identified in the recent research for the Thinkingplace work completed for the London Borough of Haringey whose aim was to develop a compelling new narrative for Wood Green.



Ealing Broadway shopping centre



Accessibility

Infrastructure

Ealing will benefit from the arrival of Crossrail in 2019. The Council with TfL have started to improve the local transport infrastructure around the town centre, in order to take advantage of the opportunities Crossrail will bring. This will bring additional public transport capacity and create an attractive environment for commuters and attract good quality occupiers.

Scheme	Details	Date	Benefit
Ealing Broadway Station – Crossrail	<ul style="list-style-type: none"> Substantial remodelling, new entrance doubling floor area, public realm improvements, lifts for step free access, redesigned waiting room, new pedestrian footbridge, platform extensions, and new communication systems. It also includes new toilet facilities, CCTV and improved station signage. 	2018	<ul style="list-style-type: none"> Increased capacity making surrounding area more accessible and attractive to commuters to support extra capacity from Crossrail trains Improve the appearance, amenity and perception of safety within the area.
Transport Infrastructure Improvements	<ul style="list-style-type: none"> Corridors and Neighbourhoods (CAN) £2.5 Million funding from TfL to make borough wide transport improvements. Including: <ol style="list-style-type: none"> Traffic calming measures New and improved pedestrian crossings, footways and traffic signal removals and cycle safety Public realm enhancements Improved bus stops 		<ul style="list-style-type: none"> Enhanced road safety in the area Improve the attractiveness of the area for residents, encouraging more people to relocate into the town centre Improve accessibility Increase the perception of safety
Ealing Broadway Station Forecourt Improvements	<ul style="list-style-type: none"> Upgraded lighting, CCTV, artwork, seating and using shared space principles outside the station for pedestrians, cyclists and vehicles. Shared space uses high quality paving to show road priorities. 	Spring 2017	<ul style="list-style-type: none"> Increased capacity to accommodate projected growth in volume of passengers. Improve the look and feel of the town centre encouraging more people to visit and improve the perception of safety in the area

Delivery

Planning Policy

In the Unitary Development Plan (UDP) 2004, the London Borough of Ealing identified a large number of strategic development sites and developed Supplementary Planning Documents for a number of key sites. The purpose was to aid the regeneration of the area to help it respond positively to competition from other Metropolitan Centres such as Croydon and Kingston.

The Council's spatial development framework review identified five spatial priorities for Ealing Town Centre:

- Prioritise retail
- Protect, retain and consolidate existing business uses and space within the business quarter on Uxbridge Road.
- Ensure a mix of uses on the Arcadia site, such as residential, commercial and retail
- Prioritise the townscape role of new buildings and consistency of scale with developments focusing on high quality streetscape, new urban spaces and an appropriate response to existing character.
- Encourage growth of a cultural quarter in order to build on the diverse and creative mix of uses and to help the night time economy and extend the reasons for people to visit Ealing Town Centre



Proposals for Arcadia Centre Ealing



Architects impression of Ealing Broadway station

Ealing Council-Led Initiatives

Scheme	Details	Intervention	Date	Benefit
Ealing Filmworks Development	<ul style="list-style-type: none"> The scheme comprises of an 8 screen 1,000 seat cinema, a high quality mix of restaurants, Cafes and shops, 161 new homes and improved pedestrian links 	<p>SPD - The Council also put together Ealing Cinema Site Supplementary Planning Document (SPD) 2013 specific to the site, to articulate clear design principles for developers.</p> <p>CPO – A CPO to assemble the remaining land needed is currently being pursued</p>	2017	<ul style="list-style-type: none"> By articulating a clear vision for the site through the SPD, developers were able to respond appropriately. The CPO increased the deliverability of the scheme enabling the developer to acquire the land and remove any third part interest or rights attached
Arcadia Centre – Phase 1	<ul style="list-style-type: none"> Refurbishment of old shopping centre, converting the centre into a space for three shops: Morrison's, MacDonald's and TK Maxx. 	<p>SPD –The Arcadia Site Supplementary Planning Document (SPD) 2013 sets out clear framework and principles for a development.</p>	2014	<ul style="list-style-type: none"> Anchor tenant Morrison's will create 300 jobs for the area, increase footfall in the area, providing a catalyst for regeneration of town centre.
Arcadia Centre – Phase 2	<ul style="list-style-type: none"> 200 unit residential mixed use redevelopment and 20 retail units and café lined passageway and parking for bikes and cars. 	<p>SPD –The Arcadia Site Supplementary Planning Document (SPD) 2013 sets out clear framework and principles for a development.</p>	2017	<ul style="list-style-type: none"> Contribute towards the regeneration of the area and attracting good quality occupiers to the area
Ealing Broadway Shopping Centre	<ul style="list-style-type: none"> Refurbishment of building to increase retail floor area providing new double height shops and two new storeys, 55 new homes for rent. 	<p>SPD – Identified for refurbishment and mixed-use development to include retail, commercial, leisure, residential and community uses in the Development Sites DPD.</p>	2014	<ul style="list-style-type: none"> Redevelopment of the shopping bringing significant private sector investment to Ealing town centre. Increasing footfall to the area via new residents, visitors, shoppers, as well as attracting good quality anchor retail tenants. Improved town square with modern events space to host markets and festivals for the local community.
Dickens Yard	<ul style="list-style-type: none"> Residential-led scheme comprising 698 new homes, 22 retail units and 100,000 sqft of commercial floorspace, a new community hall and town square 	<p>Utilising Public Land Assets - Partnership with developer St George. The land was a Council car park and previously housed a number of Council offices</p>	2015	<ul style="list-style-type: none"> New upmarket residential quarter for Ealing, gentrification of the area and encouraging occupiers to move into Ealing by offering high quality commercial space, improved public space creating attractive environment which encourages further investment
Ealing Broadway and West Ealing BIDs	<ul style="list-style-type: none"> The BID focuses on funding to reduce crime, by appointing a Town Centre Ranger, improved signage and street lighting, cleaner streets, promotion of events and activities, car parking initiatives and lobbying for local businesses. 	<p>East Ealing BID set up by Ealing Council in 2011 and West Ealing BID in 2014</p>	2011	<ul style="list-style-type: none"> Improved perception of safety and reduced levels of anti-social behaviour litter leading to higher levels of customer satisfaction and making town centre more attractive to visit. Events promotion raises the profile for Ealing Broadway as a place to shop resulting in an increased number of visitors to the town centre.

Ealing Cultural Initiatives

Encouraging the growth of the Cultural Quarter was identified as one of Ealing's five spatial priorities in the Spatial Development Framework Review as the Council believed that a cultural centre would increase the night time economy, encourage more people to visit the town centre and create an identity for the area.

Ealing Cinema was a significant development site identified by Ealing in Development Sites DPD 2013. The Council was keen for the site to become a cultural anchor and significant leisure and entertainment destination. The DPD set out a requirement for a mixed use scheme to include a multi-screen cinema whilst the Ealing Metropolitan Centre Spatial Development Framework identified the need for a new film focussed cultural quarter, with the potential for pedestrian links, a new cinema, studios, media related creative industries and outside space for performance. The Ealing Cinema SPD 2013 sets out key objectives that a successful development would need to meet:

- Comprehensive redevelopment to achieve the most benefit for the town centre and the creation of new pedestrian links. The Council stated that they would actively use its own land holding within the site to facilitate development
- Focus on the delivery of high quality culture and leisure uses on the site
- Create a new cinema square public space for the town centre that provides enhanced connectivity
- Improve the environment on and around the site, including surrounding streets and spaces.

The SPD also directed that proposals must be based on a masterplan for the site as a whole that will realise the full potential of the site. The site is now being developed into Ealing Filmworks, which includes a cinema, gallery space, outdoor seating space, a mix of restaurants, cafes, shops and bars, new homes and improved pedestrian links. The scheme should complete 2018.



Architects impression of the Ealing Filmworks Development

Summary of Key Areas Where Wood Green Could Learn from Ealing

- Strategy for Cultural Initiatives Delivery - Identifying the lack of a clear identity and image in Ealing, the Council focussed on the creation of a cultural quarter, centred on a cinema and event space. The Council encouraged development by producing supporting site specific Supplementary Planning Documents, identifying development sites with indicative uses to the maximum benefit of the site is realised. In Wood Green the Council should develop a strategy encompassing a vision, quality mix of uses and strategy for the delivery of a new cultural offer for the town centre. Currently this is proposed to focus on the Cultural Quarter to the west.
- Land Assembly – Ealing demonstrated its support for facilitating the delivery of new development in the town centre by using its CPO powers to assemble the land needed to deliver the Ealing Filmworks scheme. Without it the benefits of comprehensive redevelopment are unlikely to be realised. In the medium to long term – and dependent on the future plans for Wood Green town centre – the London Borough of Haringey may need to consider using CPO powers in order to assemble the land needed to deliver comprehensive redevelopment.
- Set up a Business Improvement District (BID) – Ealing set up two different BIDs with slightly different priorities but with the overarching aim of improving the perception, safety and attractiveness of the town centre. A BID is an initiative that could greatly address key issues around perception of safety, quality of environment and attractiveness of Wood Green to visitors (INSERT REFERENCE FROM FLUID / ELSEWHERE IN REPORT). However, implementation is dependent on local businesses agreeing to pay additional business rate contributions in an area where affordability of accommodation is a key issue.
- Protect Retail and Consolidate Employment Uses – Through the planning framework, Ealing identified the importance of prioritising retail and consolidating commercial uses in its town centre. A similar approach is likely to be needed in Wood Green to ensure these uses are not competing with higher value uses, in particular residential.
- Lever Improvements to Areas around Public Transport Nodes – Ealing awaits the arrival of Crossrail which will greatly improve connectivity to and from the town centre. Wood Green would greatly benefit from developing proposals for enhancing the areas around existing nodes such as Wood Green and Turnpike Underground Station, then also Crossrail station(s) if confirmation on go ahead is received. Leverage relationships with Network Rail and TfL.

Council-Led Interventions and Investment for Wood Green

Introduction

Drawing on the findings in the preceding sections of this report, we set out the priority interventions and investment required to attract/nurture target businesses.

In this and additional supporting reports produced for the Wood Green Investment Framework we have identified the following types of businesses as being those that should be targeted due to their likely ability to improve the overall health and vitality of Wood Green town centre.

- Support New and Existing SME Businesses – The London Borough of Haringey has a high proportion of self-employed and micro businesses in the Borough which should be supported and grown. Encouraging SME businesses to either remain, relocate or start up in Wood Green would greatly support the vitality of the town centre.
- Developing Further Wood Green and Haringey's Strongest Business Sectors – For example – excluding industrial based uses - Arts, Fashion, Creative occupy 34% of SME workspace in Haringey.
- Comparison Goods Retailers – Wood Green has a comparison goods retail offer (76%) - measured as a proportion of total retail floorspace - at the lower end of the scale compared to other Metropolitan town centres. Comparison Goods retailers draw more visitors to an area, serve a wide catchment area and generally provide higher quality retail offer compared to convenience retail.
- Independent Retailers – Improve the vitality of the high street and retail offer by attracting new quality independent retailers.
- Public Sector and NGO Occupiers – Wood Green is a well-connected and affordable rent location in London with significant future regeneration potential. Local or regional public sector and NGO organisations (local or regional) seeking new or refurbished office accommodation with the benefit of town centre amenities may find Wood Green an attractive location.
- Cafes and Restaurant Operators – The TCHC identified low provision of cafes and restaurants in Wood Green town centre compared to other Metropolitan centres
- Cultural Institutions – At present there does not exist many organisations in Wood Green who can run cultural facilities and programmes of events. At the time of writing this report the Mountview Academy of Theatre Arts, a drama and production school announced that it intended to relocate to a new home outside the borough.

Interventions and Investment

Taking into account the findings from the case study analysis, we consider that the following areas should be considered for Wood Green in order to assist with the enhancement of the town centre's vitality and viability and maintenance of Metropolitan Centre status.

Support and Promote SME Businesses in Wood Green through Focused Initiatives

SMEs can take the form of businesses working which occupy a range of property uses including retail, leisure and workspace. SMEs have specific needs and we have seen in the previous section how Councils are providing targeted support. Croydon Council have focused particularly on supporting retail-based SMEs:

- Funding a programme of pop-up shops in vacant retail units as part of their high streets improvement and retail support package. Includes Croydon Street Food Hub.
- Short term peppercorn or affordable rents
- Flexible lease terms.

They have also implemented a number of incentives to support new and existing SMEs including:

- Loans for start-up and existing businesses at competitive lending rates
- Business rates relief of 100% for up to a year
- An Enterprise Hub facility with business outreach services and skills development
- Opening up new business opportunities to SMEs from the public and private sectors

Ealing Council have taken the approach of protecting and consolidating commercial uses within Ealing town centre, ensuring that higher value uses such as residential do not displace them.

Through other research DTZ is aware that for its station properties Network Rail takes the approach of identifying demand for a number of independent retailers in their properties then developing a retail strategy for each property to identify the optimum mix of tenants appropriate to the passenger. Tenants are then chosen based on the current tenant mix, not the level of rent they are willing to pay. Network rail offer a variety of units including:

- Inline units – built units on the perimeter of the station provided as shell and core on long term leases
- Pop-ups – inline units that are fitted out by network rail and available for short term leases (less than 3 years)
- Rents for the units are based on a percentage of turnover, backed up by a minimum guaranteed rent (MGR)

At East Village in Stratford the landlord Get London Living offers a variety of 30 smaller retail units 600 sqft - 2,800 sqft in addition to some larger units. The scheme has recently converted one of the larger retail spaces into a shared space for a variety of independent occupiers offering a shopping collective. The vision is for the new shared space to create a community of brands, artists, retailers, makers and traders who come together to share the creative space. It is more suited to 'makers' who should offer something new to the local residents. The space has also been designed with the intention that it can also be used for events, festivals and fairs where the occupiers contribute to the events on site.

Encouraging businesses to locate (and remain) within the town centre improves the viability of retail and leisure uses by drawing additional spending from employees and increasing revenue as well as increasing vitality. Overall these have the effect of contributing towards and improvement in the Metropolitan centre status whilst attracting creating new jobs and promoting growth.

Establish a Business Improvement District (BID) for Wood Green

A BID is a zoned town centre initiative that could greatly address key issues around perception of safety, quality of environment and attractiveness of Wood Green to visitors. BIDs typically focus on reducing crime, improving the environment and perception of the BID district through initiatives such as improving signage and street lighting, cleanliness and appearance of streets, promotion of events and activities, car parking initiatives and lobbying for local businesses and investors. Management is typically led by a BID manager with town centre rangers.

The likelihood of success of establishing a BID is dependent on the support of local businesses agreeing to pay additional business rate contributions (typically 1% of business rates) in an area where affordability of accommodation may already be a key issue.

Since being established, Croydon's BID district has seen a 10% reduction in overall crime and 36% reduction in robbery. Since setting up two BIDs which focus on slightly different priorities, Ealing town centre has seen an improved perception of safety, reduced levels of anti-social behaviour and litter leading to higher levels of customer satisfaction.

We understand that the Council is in the early stages of considering establishing a BID for Wood Green.

Use of Council Land Assets and Consolidation of Council Accommodation

Public authorities with extensive land ownership presence in a town centre can more easily lever regeneration through redevelopment and/or refurbishment of existing properties. This is the case in Wood Green with London Borough of Haringey's property portfolio.

Croydon, in a similar position developed its regeneration strategy around a local asset backed delivery vehicle called the Croydon Urban Regeneration Vehicle (CCURV), a 28 year partnership with John Laing. By putting in Council assets it is able to facilitate regeneration through providing sites for redevelopment for residential, office (including a new Council office) and retail. In addition to delivering physical regeneration in the town centre, value realised from new development can be reinvested in new facilities such as new Council accommodation. The redevelopment of Croydon's former offices at Taberner House is the fourth major development to come forward having started end of 2014.

Like Croydon, the London Borough of Haringey (LBH) has significant land assets in and around Wood Green which could be used to facilitate redevelopment across the town centre for good quality retail and commercial uses to attract the types of businesses listed above. In particular Council assets could be used to deliver new SME workspace when cross subsidised alongside the delivery of residential development to generate the value needed.

Develop a Strategy for a Cultural Offer

Wood Green has identified an area for a Cultural Quarter in the Heartlands area close to Wood Green as well as a proposition to be largely anchored around the Chocolate Factory workspace owned by Workspace Group. However we understand there is currently no cultural institution or anchor to steer the cultural offer. The Council should develop a delivery strategy which builds on the existing vision, with quality mix of uses and the relationship of this area to Wood Green town centre and its amenities.

Having identified a lack of identity in Ealing town centre, Ealing Council focussed on the creation of a cultural quarter, centred on a cinema and event space. The Council encouraged development by producing supporting site specific Supplementary Planning Documents, identifying development sites with indicative uses to the maximum benefit of the site is realised.

In Wood Green, Haringey may wish to identify potential cultural institutions that could anchor and manage new cultural developments. Attracting cultural businesses and institutions to Wood Green would drive employment in the area with associated benefits for the town centre.

Exploit Development Capacity in Wood Green to Drive New Residential and Commercial Development

Wood Green may have the capacity to deliver up to 5,000 new homes and has a target of delivering up to 1,500 new jobs. Should the above quantum of development arising from the above be delivered, it would substantially increase the spend profile of the Wood Green catchment area from local residents and employees. This would enhance the vitality of the area supporting nearly all the businesses identified earlier in this section, particularly retail and leisure businesses who would benefit from an improved spending profile.

This measure is best supported through a supportive planning policy framework either in the form for the Area Action Plan being developed or and OAPF.

Consider Putting in Place an OAPF for Wood Green Town Centre

Croydon was designated an opportunity area in the Croydon Opportunity Area Planning Framework (COAPF) and adopted in 2013. The Croydon's COAPF has played a key role providing a strategic overarching planning framework that promotes the renewal of the town centre. An OAPF has played a similar role in Ealing to realise large scale redevelopment of the town centre centred on retail-driven offer. By contrast Wood Green (including Haringey Heartlands) is defined in the London Plan as an Intensification Area, which is defined by the GLA as an already built up area with good existing or potential transport links and can support redevelopment at higher densities. The GLA defines Intensification Areas as having significant capacity for new jobs and homes but at a level below that which can be achieved in the Opportunity Areas. Whilst Haringey Council is developing an Area Action Plan (AAP) for Wood Green, we understand it intends to explore with the GLA, the potential for Wood Green to be designated an Opportunity Area. Opportunity Areas are considered by the GLA to have potential for at least 5,000 jobs or 2,500 new homes or a combination of the two, along with other supporting facilities and infrastructure.

Typically an OAPF is prepared for an Opportunity Area whereas an Area Action Plan (AAP) may be prepared for an Intensification Area. If Wood Green is accepted by the GLA as an Opportunity Area, then an OAPF will be prepared to guide future housing and employment growth. Otherwise, Haringey Council will prepare an AAP to guide development of the area. Either document will stipulate a vision, the development opportunities and parameters to guide where investment should be directed in key sites, building densities as well as where infrastructure investment may be needed. An OAPF would also have the benefit over the AAP of having greater GLA buy-in to future proposals for Wood Green through the OAPF designation and inclusion in the London Plan. We would argue this has more strategic significance for London, potentially strengthening the argument for investment for strategic bodies such as TfL.

In LBHF the White City Opportunity Area land use strategy identifies and prioritises providing employment space for creative, academic, technology and SME sectors. The main areas identified as opportunities include:

- Research and development led by small start-up firms
- Production, broadcasting and entertainment
- Fashion design and retail headquarters, linking with proximity to Shepherd's Bush Market fabric shops.

In the context of Wood Green, an OAPF would provide an important framework which identifies the overarching priority interventions that would assist the town centre attracting the types of businesses it wishes to target.

Improve Social Infrastructure Provision

Providing good quality social infrastructure plays an important part in both serving existing residents, businesses and visitors as well as attracting new ones to an area. Typical examples include education, libraries, health, sports and civic facilities.

Croydon Council identified huge demand from local families for new, high quality primary school places in the town centre. Croydon's interventions so far have included the expansion of several primary schools from one form to two form entry which has doubled the capacity of the schools. Over the next three years £96 million will be spent on expanding a further 8 schools. Funding was obtained from the Department for Education Fund for part of the improvements.

Quality of education provision has a significant impact on the perception and attraction of an area to work and live. Sometimes this can lead to a premium being paid. This drives demand and improves viability of commercial and residential uses in an area.

Develop a Quality Leisure Offer

Providing good quality social infrastructure plays an important part. The 2014 Town Centre Health Check identified that whilst Wood Green has good provision of cinemas, other types of leisure facilities that would expect to be found such as restaurants, cafes and theatres are lacking in number whilst lower quality takeaways are high. To improve Wood Green on key TCHC measures, improve footfall and dwell time as well as develop the nighttime economy, it is worth looking at initiatives delivered in other key Metropolitan town centres.

Croydon Council have focussed on leisure-led initiatives such as the Surrey Street Food Hub. The Council offered free premises in Surrey Street Market for 6 months and £3,000 start-up initiatives to a number of street food traders. The Council's aim was to attract more visitors to the town centre, raising its profile as a food destination, add vitality and encourage similar businesses to the area.

Like social infrastructure provision, improving Wood Green's leisure offer would assist attracting target businesses.

Improve Town Centre Connectivity

Connectivity plays a key role in the function of a town centre and its surrounding neighbourhoods. The success of future development proposals in and around the town centre depends on the quality of connectivity serving them. Connectivity across Wood Green is largely based on movement along the High Road with some good east to west connections to some surrounding neighbourhoods in some areas but poor connections with others, particularly from the Library towards the Cultural Quarter. To improve connectivity in this area may require significant measures in terms of planning, land assembly and public realm improvements.

Through the case studies we have noted that all the local authorities have incorporated connectivity improvements as key parts of their strategy for revitalising their town centres, in particular Croydon. In Croydon the following initiatives - through the Connected Croydon Programme - were key to improving connectivity:

- £50 million set up for high street, public space and transport improvements across the town centre.
- New £20 million pedestrian footbridge across all platforms of East Croydon station linking new Stanhope-Schroders' Ruskin Square scheme with Menta's Cherry Orchard Road scheme on the other side of the railway lines.
- Lansdowne Road public realm improvements: New 350m pedestrian route into East Croydon station and reduced road area at junctions to increase space for pavements for pedestrians.

In Shepherd's Bush, LBHF focused in partnership with TfL in leveraging the most from the public transport infrastructure investment from the new Westfield Shopping Centre, by improving connectivity between the town centre and key public transport nodes. Improving connectivity in Wood Green would greatly assist attracting target businesses

Improve the Quality and Capacity of Education Provision in Wood Green

Quality of education provision is a key factor in determining where people – in particular young families – choose to live and can command a premium in residential property prices of up to 12% for the top performing schools.¹

Where the delivery of new residential in and around a town centre is important such as it is in Wood Green, improving the quality of education provision is an important factor in driving residential value and therefore viability. New residents add vitality and bring spending into town centres, supporting the retail and leisure offer.

Croydon is investing £96 million on education provision in the next three years.

¹ <http://blogs.lse.ac.uk/politicsandpolicy/school-house-prices-gibbons/>

Use Council CPO Powers to Facilitate Comprehensive Town Centre Regeneration

In the long term, to realise comprehensive regeneration of a town centre, it is likely to require acquiring numerous individual land parcels and resolving third party legal rights. With so many individual parcels of land ownership it is rarely possible to acquire and resolve all these within a reasonable time period. Both Ealing and Croydon have demonstrated the importance of their roles in facilitating the delivery of new development in their town centres by utilising CPO powers available to them. Without them it is possible that the proposed Ealing Filmworks and new Westfield-Hammerson Croydon schemes would be delivered without having to compromise somehow or simply not progress at all.

CPOs provide certainty through yielding up development sites within specific time periods. Council CPO costs are commonly covered by the private development partner.

The use of CPO powers would need to be considered alongside the development of future planning documents such as the Wood Green AAP (or an OAPF), as without the use of this it may not be possible to realise the comprehensive nature, scale and ambition of proposals envisaged.

Council Leadership of Strategic Stakeholders to Secure Support and Resources

To realise the revitalisation of town centres in London though interventions such as those mentioned above requires close working with key stakeholders. In London the key strategic stakeholders are the GLA, Transport for London (TfL), Network Rail, Metropolitan Police, NHS and the Environment Agency. These stakeholders not only play a key role in providing expertise, planning and political support, investment and physical delivery. As the local planning authority, the London Borough of Haringey plays a central role in the future development proposals for Wood Green. Key to that role is leading the strategic stakeholders to ensure that town centre proposals deliver the maximum benefit.

In Croydon we have seen the role Network Rail have played in significantly improving public transport accessibility by investing nearly £15 million towards a new pedestrian bridge over as well as serving East Croydon station in addition to an enhanced entrance.

In Shepherds Bush LBHF levered £30 million of additional funding from TfL for road improvements on top of £170 million from S106 contributions from Westfield.

Spatial Requirements

To guide the development of proposals for the Wood Green Investment Framework, we set out a number of areas that should be focused on incorporating findings from earlier sections in the report with proposed approaches for delivering each.

DTZ's comments on retail should be read in conjunction with DTZ's Retail Demand and Development Opportunities Study (2015).

- Local property agents have indicated that the stretch between M&S and WH Smith (south of the Mall) on the High Road, has the greatest footfall whilst the area around the library also has a healthy footfall. Interventions relating to retail should utilise areas of greatest footfall and how it may wish to be shaped across the town centre.
- Avoid breaking up ground floor frontages with other uses along the High Road, e.g. employment or residential. These uses are essential to support a vibrant and prosperous town centre but are more appropriate above ground floor Class A uses or set back from the high street. Ealing took the approach of protecting commercial uses – including retail – to ensure that higher value uses such as residential do not break up the high street.
- Redevelop or refurbish existing retail blocks to provide a modern, well designed retail offer meeting retailer requirements in terms of floorplates. The decline in middle market retailers in this area, such as Marks & Spencer, is one indication of the need in this area. Deliver in conjunction with comprehensive public realm improvement works.
- Consider creating a focal point within the retail core with new public space such as a square e.g. around the Wood Green Library which can provide Class A3 (including outdoor dining) opportunities and be used to host events such as markets.
- Review existing land ownership situation and to what extent the optimum enhancement of the retail core and general town centre offer through proposals can only be delivered viable comprehensive redevelopment and in turn whether this requires compulsory purchase to be used. Use of Council assets such as the library site will be key.
- Improve connectivity and integration of retail core with surrounding area and neighbourhoods.
- Consider whether a new retail focal point in the existing library area would make a suitable location for relocation of Council civic and potentially back office function [to be confirmed as part of ongoing accommodation strategy work]
- Consider where short-medium term retail offers such as Boxpark (found in Shoreditch and Croydon) could be accommodated in Wood Green to provide a differentiated offer from conventional high street retailers. Also pop up / short term retailers.
- Identify location for a new market where existing market activities can be consolidated and improved. This would offer an additional layer of vitality and retail offer.
- Identify most appropriate future location of Morrisons/ supermarket retail within the town centre to optimise the potential for enhancing the retail core and opportunities for linked trips. It is assumed that the continued presence of a supermarket of the scale of Morrisons in Wood Green is supported by the Council.
- Drive quality of retail operators, particularly in A3 and A5 (including family-orientated A3 offer). Lack of quality food and beverage offer is particularly pronounced and is strongly linked to the health and offer of the nighttime economy. Cinemas and theatres are particularly good drivers of footfall in a town in the evenings.
- Ensure sufficient and convenient/ flexible provision of car parking for shoppers and town centre visitors, however focus should be on enhancing and developing new linkages with public transport, in particular tube and bus. Ensure good quality and safe cycling and pedestrian routes through the town centre which integrate with surrounding areas in Haringey. Sufficient cycle parking and Santander Hire Cycles in appropriate locations is also emerging as a key requirement.
- Overall improving dwell time in the town centre through a range of retail offers and other attractions (including enhanced A3 offer) is key to supporting spending and therefore viability.
- Outside the retail core improve offer of smaller scale retail and/or service uses at ground floor level, particularly in the area around the proposed Crossrail 2 station. Mix of other uses above may be appropriate.
- Cultural Quarter: provision of some ancillary, small scale retail and/or service uses at ground floor level.
- Consider how the establishment of a Business Improvement District (BID) in Wood Green would work in relation to spatial retail proposals. What are the key requirements? Maintenance only or also capital contribution towards improvements?

Develop Wood Green's Cultural Offer

- Cultural facilities/assets/institutions. Whilst cinema provision in the town centre is very good, there is no identifiable theatre facility or other cultural institutions. This could form a key anchor as part of future proposals for the Cultural Quarter.
- Identify a cultural institution anchor. A key requirement will be identifying if there is an existing organisation that is seeking to relocate to a new facility. External funding is key to realising delivery of a new building.
- Provide a package of incentives for cultural industries to locate to the area.
- Identify opportunities to link cultural quarter and Wood Green town centre with forthcoming proposals for Alexandra Palace and the BBC.

Maintain, Enhance and Develop SME Business Floorspace

- SME businesses form 99% of total businesses by size in Haringey. 93% of the businesses employ 10 or less people and therefore this sector should be focus of support and enhancing.
- Opportunities to protect and enhance quality of existing workspace in existing buildings should be explored wherever possible. Also requires differentiation in offer for a range of occupiers across blocks. Existing conversion and refurbishment of existing building stock for SME workspace makes up 50% of new floorspace delivered across London. Historic buildings with character are particularly attractive to occupiers.
- Viability of new space is marginal and occupiers are very price sensitive therefore needs to be delivered directly via the most viable uses such as residential. This could either be through ground floor workspace with residential above delivered as a planning requirement. Alternatively new workspace blocks subsidised through land value which will most likely require public land assets to subsidise delivery as private developers will not provide.
- The opportunity for workspace in Wood Green is for more affordable modern floorspace to attract businesses being pushed out of more central London locations.
- Demand for small size industrial and workshop units will remain high whilst larger units will see a downward trajectory. Industrial land and buildings are under pressure from higher value uses such as residential, which when redeveloped has the effect of reducing supply. A particular issue for small businesses where there is demand. Where there is planning protection in place, industrial units should be refurbished for modern occupier requirements. Affordability is a key issue.
- Connectivity and proximity to public transport and amenities is important. Crossrail 2 will deliver a step change for Wood Green in the long term, whilst improving connectivity should be a key focus in the short-medium term.
- Utilise opportunities where possible for Council to be an anchor tenant for any new office space, be it for back office function alone or with civic function.
- Clustering of workplaces enhances appeal of an alongside good quality surrounding environment and amenity offer.
- Through our case study work, we have identified through initiatives in Croydon the key requirement for future workspace proposals to consider the delivery of an Enterprise Hub (EH). The EH is an office and networking-based facility that delivers outreach support to local businesses offering services such as mentoring, business and start-up training, leadership and HR, legal advice. This could be accommodated in an existing building in Wood Green but location is key in relation to wider workspace spatial proposals.

Deliver New Residential in Appropriate Locations and at Density

- Residential is the most viable and value generating use in the context of Wood Green. This is particularly relevant where new residential can be delivered on land owned by the Council as value realised can be reinvested elsewhere in the town centre.
- The three top constraints on the potential for and viability of residential are levels of affordable housing provision (London Borough of Haringey policy is 50%), density and extent of development land available for redevelopment (the larger the site the more the opportunity to optimise the efficiency of housing being delivered).
- Use of compulsory purchase powers is often key to realising the potential of proposals by creating certainty and accelerating land assembly of sites to deliver schemes. This can be led by the Council in partnership with a development partner. As Wood Green is an attractive location with even better future prospects with the arrival of Crossrail 2, opportunities for partnership will be attractive to residential and mixed use developers, albeit ones with the financial capability and experience.
- A supportive planning framework – such as an AAP or OAPF - is crucial to supporting delivery.

Enhance Town Centre Public Realm Offer

- Good quality public realm is key to attracting retailers, occupiers and visitors to town centres due to its impact on defining people's perception of an area as an attractive, pleasant and safe location to be.
- Public realm initiatives should include design/spatial proposals which create a safe environment as this is one key area in relation to Wood Green that requires improvement based on feedback from the Thinkingplace study.
- Traffic calming measures are important for improving the visitor experience for pedestrians and cyclists.

Maximise the Potential of Local Public Transport Infrastructure

- Accessibility to a town centre viable public transport is one of the most critical factors in supporting town centre vitality through delivering and directing footfall. The Council should seek to maximise the maximum improvements in the following which should be considered as part of spatial proposals for Wood Green town centre:
 - a. Improve passenger capacity in line with anticipated growth in residents, businesses, retail and leisure uses.
 - b. Ensure connectivity between key public transport nodes and town centre developments is considered as part of spatial proposals. The greater the connectivity throughout the town centre, the more attractive a location.
 - c. Forecourt improvements including lighting, CCTV, artwork, seating and increases in space.
 - d. Improve environment immediately around bus and tube stations to make them more attractive and perception of safety.

Enhance Education Quality and Capacity

- Quality of education provision is a key factor in determining where people choose to live and can command a premium in residential property prices of up to 12% for the top performing schools.¹
- Where the delivery of new residential in and around a town centre is important such as it is in Wood Green, improving the quality of education provision is an important factor in driving residential value and therefore viability. New residents add vitality and bring spending into town centres, supporting the retail area.
- Croydon is investing £96 million on education provision in the next three years.
- Location is key consideration in relation to other uses.

Deliver Other New Social Infrastructure

- Refurbishment of existing green spaces to create an attractive environment for residents, occupiers, shoppers and visitors to an area. Can have other benefits such as improving sense of safety and improving dwell time in an area.
- CCTV and supporting security initiatives coordinated with the located police force.
- Consideration for where health, police, library and other public services are provided in Wood Green town centre. Some will require more prominent high street locations than others though key requirements will be accessibility. Public administration, education and health are the single highest employers in Wood Green (28%), therefore a key occupier in the area indicating significant floorspace with potential.
- Identify existing strategic stakeholder property assets that can be disposed of and consolidated with other stakeholders to realise value, development sites and modern public service facilities.

¹ <http://blogs.lse.ac.uk/politicsandpolicy/school-house-prices-gibbons/>

