

Briefing Note

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To Enfield Borough Council
From Peter Wilks
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Subject Enfield Retail and Town Centre Update

1.0 Introduction

1.1 Lichfields was instructed to prepare a Borough wide retail and town centres study for the Council in 2018, which provided supporting evidence for the emerging New Local Plan (NLP). This evidence was partially updated in November 2020 and December 2021. This Briefing Note assesses the implications of more recent changes to population and expenditure projections, particularly the increase in housing numbers in the Borough.

2.0 Population

2.1 Lichfields' December 2021 update adopted the GLA's 2018 base housing led population projections. These GLA projections suggest Enfield Borough's population would increase from about 335,700 in 2019 to about 361,700 in 2041. The GLA projections assumed the total housing stock in the Borough would increase from by about 125,300 homes in 2019 to 148,300 homes by 2041, an increase of 23,000 new homes. These GLA projections assumed the average number of people per dwelling was 2.7 people in 2019, which was projected to decrease to 2.4 people per dwelling in 2041.

2.2 The updated new homes figure assumed in the NLP is about 34,000 between 2019 to 2041, higher than the 23,000 new homes assumed in the GLA's housing led population projections. The implied total housing stock in 2041 would be 159,300 homes. Based on the GLA's average of 2.4 people per home, the updated Enfield population projection for 2041 is just over 382,000 people. Updated population projections for the stud area zones are shown in Table 1 below.

Table 1: Study area population

Zone	2019	2026	2031	2036	2041
Zone 1 - Enfield North West	57,197	58,716	58,139	58,231	60,020
Zone 2 - Enfield North East	83,724	82,752	83,361	85,024	88,261
Zone 3 - Enfield South East	90,628	102,962	126,949	128,743	124,082
Zone 4 - Enfield South West	104,175	103,078	102,005	104,523	109,868
Zone 5 - Barnet East	63,607	63,816	65,223	67,242	68,445
Zone 6 - Haringey North	108,221	115,807	120,009	123,274	125,564
Zone 7 - Waltham Forest West	65,955	68,218	70,036	70,827	71,570
Total	573,507	595,349	625,723	637,864	647,810

Source:

GLA housing led ward level population projections 2018 based on 23,000 new homes by 2041

GLA population projections adjusted to reflect increase in new homes in Enfield to 34,000 new homes by 2041

3.0 Expenditure

- 3.1 Lichfields' December 2021 update adopted Experian's 2018 local expenditure per capita estimates for the study area zones. Expenditure was projected based on Experian's recommended forecasts at that time, provided in their Retail Planner Briefing Note 18 published in October 2020. The 2021 update also adopted Experian's recommended forecast for changes in special forms of trading (SFT) which is deducted from available expenditure.
- 3.2 Experian's latest Retail Planner Briefing Note 21 was published in February 2024 and now provides actual rather than forecast changes in expenditure and SFT between 2018 to 2022. The new briefing note also provides new forecasts. Updated expenditure (at 2018 prices) per capita with SFT deducted is shown in Table 2 (convenience goods retail), Table 3 (comparison goods retail) and Table 4 (food/beverage). Updated population and expenditure per capita projections have been combined to recalculate total expenditure available in the study area zones in Tables 5, 6 and 7.

Table 2: Convenience goods expenditure per person (£)

Zone	2019	2026	2031	2036	2041
Zone 1 - Enfield North West	2,244	2,131	2,115	2,112	2,118
Zone 2 - Enfield North East	1,890	1,795	1,781	1,779	1,784
Zone 3 - Enfield South East	1,832	1,740	1,727	1,724	1,729
Zone 4 - Enfield South West	2,258	2,144	2,128	2,124	2,130
Zone 5 - Barnet East	2,162	2,052	2,037	2,034	2,040
Zone 6 - Haringey North	1,794	1,704	1,691	1,688	1,693
Zone 7 - Waltham Forest West	2,021	1,919	1,904	1,902	1,907

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

Experian projections and deductions for special forms of trading - Retail Briefing Note 21 (February 2024)

Table 3: Comparison goods expenditure per person (£)

Zone	2019	2026	2031	2036	2041
Zone 1 - Enfield North West	3,635	3,227	3,642	4,111	4,693
Zone 2 - Enfield North East	2,350	2,085	2,353	2,657	3,033
Zone 3 - Enfield South East	2,182	1,937	2,186	2,468	2,817
Zone 4 - Enfield South West	3,597	3,193	3,603	4,067	4,643
Zone 5 - Barnet East	3,446	3,058	3,452	3,896	4,448
Zone 6 - Haringey North	2,177	1,933	2,181	2,462	2,811
Zone 7 - Waltham Forest West	2,886	2,561	2,891	3,263	3,725

*Experian local estimates for 2018 convenience goods expenditure per capita (2018 prices)
Experian projections and deductions for special forms of trading - Retail Briefing Note 21 (October 2024)*

Table 4: Food and beverage expenditure per person (£)

Zone	2019	2026	2031	2036	2041
Zone 1 - Enfield North West	1,583	1,596	1,681	1,749	1,820
Zone 2 - Enfield North East	1,061	1,070	1,127	1,173	1,220
Zone 3 - Enfield South East	1,020	1,029	1,083	1,127	1,173
Zone 4 - Enfield South West	1,673	1,687	1,777	1,849	1,924
Zone 5 - Barnet East	1,637	1,651	1,738	1,809	1,882
Zone 6 - Haringey North	1,097	1,106	1,165	1,213	1,262
Zone 7 - Waltham Forest West	1,266	1,277	1,345	1,400	1,456

*Experian local estimates for 2018 food and beverage expenditure per capita (2018 prices)
Experian growth projections for leisure expenditure - Retail Briefing Note 21 (February 2024)*

Table 5: Total convenience goods expenditure (£m)

Zone	2019	2026	2031	2035	2041
Zone 1 - Enfield North West	128.37	125.12	122.96	122.98	127.12
Zone 2 - Enfield North East	158.27	148.53	148.50	151.25	157.45
Zone 3 - Enfield South East	166.06	179.13	219.21	221.99	214.56
Zone 4 - Enfield South West	235.19	220.96	217.02	222.05	234.07
Zone 5 - Barnet East	137.49	130.97	132.86	136.77	139.62
Zone 6 - Haringey North	194.18	197.30	202.92	208.14	212.61
Zone 7 - Waltham Forest West	133.28	130.89	133.37	134.68	136.48
Total	1,152.85	1,132.91	1,176.84	1,197.86	1,221.91

Source: Tables 1 and 2

Table 6: Total comparison goods expenditure (£m)

Zone	2019	2026	2031	2036	2041
Zone 1 - Enfield North West	207.94	189.46	211.72	239.38	281.67
Zone 2 - Enfield North East	196.72	172.57	196.19	225.90	267.69
Zone 3 - Enfield South East	197.79	199.44	277.52	317.72	349.57
Zone 4 - Enfield South West	374.72	329.09	367.53	425.15	510.15
Zone 5 - Barnet East	219.18	195.17	225.12	262.01	304.45
Zone 6 - Haringey North	235.64	223.81	261.75	303.53	352.93
Zone 7 - Waltham Forest West	190.34	174.74	202.46	231.14	266.63
Total	1,622.33	1,484.29	1,742.29	2,004.82	2,333.10

Source: Tables 1 and 3

Table 7: Total food and beverage expenditure (£m)

Zone	2019	2026	2031	2036	2041
Zone 1 - Enfield North West	90.52	93.72	97.72	101.86	109.25
Zone 2 - Enfield North East	88.84	88.56	93.94	99.71	107.71
Zone 3 - Enfield South East	92.44	105.92	137.53	145.14	145.57
Zone 4 - Enfield South West	174.25	173.89	181.21	193.24	211.37
Zone 5 - Barnet East	104.10	105.34	113.37	121.63	128.84
Zone 6 - Haringey North	118.73	128.14	139.84	149.48	158.44
Zone 7 - Waltham Forest West	83.52	87.12	94.19	99.13	104.24
Total	752.40	782.68	857.81	910.18	965.44

Source: Tables 1 and 4

4.0 Updated floorspace capacity

- 4.1 The updated Borough-wide floorspace projection, based on the new population, expenditure, SFT and sales density data outlined above, are shown in Table 8 (convenience goods retail), Table 9 (comparison goods retail) and Table 10 (food/beverage).
- 4.2 The convenience retail updated projection to 2041 is **3,920 sq.m gross**, compared with **6,403 sq.m gross** up to 2040 estimated in the December 2021 update. The new projected under-supply is lower because expenditure per capita is forecast to decline at a higher rate due to Experian's higher SFT deductions and higher increases in sales densities. These changes offset and exceed the higher population projections and later 2041 end year.
- 4.3 The comparison retail updated projection to 2041 is **-10,009 sq.m gross**, compared with **-3,557 sq.m gross** up to 2040 estimated in the December 2021 update. The new projected over-supply is higher because expenditure per capita is forecast to increase at a lower rate than Experian's previous forecasts. This change offsets and exceed the higher population projections and later 2041 end year.
- 4.4 The food/beverage updated projection to 2041 is **14,073 sq.m gross**, compared with **3,023 sq.m gross** up to 2040 estimated in the December 2021 update. The new projected

under-supply is much due to higher population and expenditure projections, Experian's forecast growth in sales densities and the later 2041 end year.

Table 8: Convenience goods floorspace capacity 2019 to 2041

Area	2019	2026	2031	2036	2041
Turnover density new floorspace (£ psm net)	£12,000	£12,024	£12,133	£12,193	£12,254
Floorspace capacity (sq.m net)					
Enfield Town	0	-320	-387	-317	-57
Zone 1 - Enfield North West	0	-147	-220	-208	-94
Zone 2 - Enfield North East	0	-463	-178	-38	251
Zone 3 - Enfield South East	0	614	2,866	3,044	2,685
Zone 4 - Enfield South West	0	-1,014	-1,103	-772	-41
Total	0	-1,330	979	1,710	2,744
Floorspace capacity (sq.m gross)					
Enfield Town	0	-457	-553	-452	-81
Zone 1 - Enfield North West	0	-210	-315	-297	-134
Zone 2 - Enfield North East	0	-662	-254	-55	359
Zone 3 - Enfield South East	0	877	4,094	4,349	3,836
Zone 4 - Enfield South West	0	-1,449	-1,575	-1,102	-59
Total	0	-1,900	1,398	2,443	3,920

Table 9: Comparison goods floorspace capacity 2019 to 2041

Area	2019	2026	2031	2026	2041
Turnover density new floorspace (£ psm net)	6,000	6,248	7,104	8,077	9,183
Floorspace capacity (sq.m net)					
Enfield Town	n/a	-8,704	-7,364	-6,813	-5,067
Zone 1 - Enfield North West	n/a	-146	-158	-157	-123
Zone 2 - Enfield North East	n/a	-3,583	-3,080	-2,882	-2,152
Zone 3 - Enfield South East	n/a	-1,969	1,198	1,474	1,290
Zone 4 - Enfield South West	n/a	-2,197	-2,249	-2,042	-1,456
Total	n/a	-16,599	-11,653	-10,419	-7,507
Floorspace capacity (sq.m gross)					
Enfield Town	n/a	-11,606	-9,819	-9,083	-6,756
Zone 1 - Enfield North West	n/a	-194	-211	-209	-163
Zone 2 - Enfield North East	n/a	-4,777	-4,107	-3,842	-2,869
Zone 3 - Enfield South East	n/a	-2,625	1,598	1,966	1,721
Zone 4 - Enfield South West	n/a	-2,930	-2,998	-2,723	-1,941
Total	n/a	-22,132	-15,538	-13,892	-10,009

Table 10: Food and beverage floorspace capacity 2019 to 2041

Area	2019	2026	2031	2036	2041
Turnover density new floorspace (£ psm gross)	5,000	5,178	5,293	5,346	5,399
Floorspace capacity (sq.m gross)					
Enfield Town	0	112	2,776	4,516	6,451
Zone 1 - Enfield North West	0	-62	98	297	510
Zone 2 - Enfield North East	0	35	329	488	654
Zone 3 - Enfield South East	0	480	1,813	2,118	2,106
Zone 4 - Enfield South West	0	-383	1,004	2,471	4,352
Total	0	181	6,021	9,891	14,073

4.5 The combined retail and food/beverage floorspace projections (cumulative) are as follows:

- Up to 2026 = -23,851 sq.m gross
- Up to 2031 = - 8,119 sq.m gross
- Up to 2036 = - 1,558 sq.m gross
- Up to 2041 = + 7,884 sq.m gross

4.6 As in the December 2021 update, the new figures suggest an over-supply of floorspace up to 2036, due to the decline in demand for comparison goods retail floorspace.

4.7 The significant projected over-supply of comparison retail floorspace in the short term (- 22,132 sq.m gross at 2026) has already led to redevelopment interest in Enfield's retail sites. The closure of the large Ikea store in the Borough is a special case. Its closure is not expected to significantly change the comparison goods floorspace capacity figures because this store had a wide catchment area serving north London and beyond. Most of the Ikea store's turnover would have been expenditure inflow from beyond the Borough, and as a bulky goods retailer, the store has a relatively low average sales density. The closure of the Ikea store is not expected to significantly increase expenditure available to other facilities in Enfield Borough.

4.8 The longer-term combined floorspace projection to 2041, allowing for gains and losses, is +7,884 sq.m gross, which is only marginally higher than the previous projection of +5,869 sq.m gross up to 2040.

5.0 Accommodating growth and implications for the NLP

5.1 The combined retail and food/beverage floorspace projection up to 2040 was estimated to be 5,869 sq.m gross in the December 2021 update. The revised figure up to 2041 is 7,884 sq.m gross up to 2041.

5.2 The 2021 update recommended the future strategy should continue to assume vacant units can accommodate growth i.e. vacant shop units could theoretically accommodate most of

the 5,869 sq.m gross projection to 2040. Proposals for a new neighbourhood at Meridian Water was expected to accommodate any residual capacity over the plan period.

- 5.3 Assuming vacant floorspace can absorb some of the projected capacity from the 2019 base year then the update figures suggest any residual need to accommodate growth up to 2041 will be limited.
- 5.4 The growth in convenience goods retail floorspace (+3,290 sq.m gross) and most of the growth in food/beverage floorspace is driven by population growth. Strategic housing development at Chase Park, Crews Hill and Meridian Water will accommodate much of this population growth. Given the scale of these strategic developments new facilities will be needed to cater for day -to-day needs within walking distance of the new homes. The provision of new local shops and services in these developments is expected to meet any residual need for new floorspace over and above the reoccupation of vacant floorspace.