



# Haringey Economic Development Strategy

Economic Baseline – Final Evidence Report

February 2020

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Key Issues for the Strategy

# Headlines



**14,210**  
*active enterprises*



**92,000**  
*jobs*



**Strong** *labour market with*  
**low** *levels of unemployment*



**2,150**  
*new businesses started in 2018*



**High levels of deprivation** *and*  
**low levels of social mobility,**  
*particularly to the East of the borough*



**Increasing pressure** *on*  
*industrial land - 60% growth in*  
*rents over the last 4yrs*



**6<sup>th</sup> slowest**  
*growing borough in London in*  
*terms of employment growth*



**1/4**  
*of those in employment are*  
**self-employed** – *higher than*  
*across London*



**Emerging clusters** *of activity in*  
**creative & digital** *sectors*



*Haringey aims to build* **19,580**  
**new homes** *over the next 10*  
*years*

**High streets** *play important role in the borough.*  
*Popular perceptions of high streets are:*

“Diverse”

“Local”

“Convenient”

“Dirty”

“Friendly”

# Introduction

## Aims of the study

Hatch Regeneris has been commissioned by Haringey Council to undertake a comprehensive and in-depth Economic Evidence Study (EES). This will be used to develop the Haringey Economic Development Strategy (EDS), which is being prepared by the Council and is planned for adoption in Summer 2020.

The EES will consolidate existing and new evidence, drawing on a mix of primary and secondary research to identify opportunities and challenges facing the local economy. Primary research undertaken to inform this assessment includes surveys conducted with businesses and residents around high streets, employment sites and industrial areas. The secondary research draws from a range of governmental datasets.

The EES will further identify priorities for the Council and recommend potential interventions to capitalise on Haringey's economic assets.

## Why now for Haringey?

Following a request from Haringey's Housing and Regeneration Scrutiny Panel to provide a clearer roadmap for inclusive growth in the Council, the EES will inform Haringey's approach to delivering good growth, drawing on the New Economic Foundation (NEF)'s headline indicators of national success comprising:

- 1. Good Jobs:** secure jobs that pay at least the Living Wage
- 2. Wellbeing and Health:** improving life satisfaction and the quality of healthcare or public health interventions
- 3. Environment:** reducing carbon emissions to enhance environmental benefits for residents
- 4. Fairness:** ensuring a more equal distribution of income levels across households
- 5. Health:** providing good quality healthcare and public health provision to enable other goals to be achieved.



## Primary Research

To complement the secondary data sources available, primary research has been undertaken by Hatch Regeneris, to gain a better understanding of the performance of businesses and town centres in Haringey. Two surveys have been undertaken as part of this research:

- + **Business Survey:** 123 surveys were undertaken by researchers, talking to businesses within the borough's Strategic Industrial Locations, Locally Significant Industrial Sites and Local Employment Areas.
- + **High Street Usage Survey:** 201 surveys of high street users were undertaken by researchers, to identify the key characteristics of these users, perceptions of the town centre and understand how they could be improved. These surveys took place across the seven Metropolitan and District Town Centres in Haringey.

## Report Structure

This report covers the following 6 areas:

- **Local Context:** A summary of the policy context driving Haringey's development, London's role within the UK and specific trends in the North London economy.
- **Employment:** An overview of the current profile of the Borough's employment trends, qualification and skill levels, occupational groups, travel to work patterns, wages and how this has been changing in recent years.
- **Businesses:** An overview of business dynamism, survival rates and key business sectors driving growth in the borough.
- **Industrial Land:** An assessment of the supply, spatial distribution and quality of industrial space in the borough.
- **Workspaces:** An assessment of the supply of space across the Borough's main employment hubs, and of evolving demand for this space.
- **High Streets:** a summary of some of the key challenges and opportunities existing on high streets in Haringey.

# 1. Local Context



## Introduction & Overview

### Introduction

This section sets out the strategic and economic context within which the EES sits.

Haringey is situated to the north of London, but in relatively close proximity to key employment areas within the City (being less than 5 miles from the City of London). The borough covers an area of more than 11 square miles and is situated within the Inner London group of boroughs.

### Overview

Haringey has strong ambitions to grow over the next ten years. There are targets to build 19,580 new homes over the next ten years. The area sits within the London-Stansted-Cambridge Consortium area, also referred to as the UK's Innovation Corridor, which is a fast growing area stretching from London to Cambridge, with a focus on advanced technology and bioscience.

In line with growth experienced across the rest of London, Haringey has grown in recent years. The growing gap between demand and supply for residential and commercial space across London is also impacting on the borough, with rising rents and land values for space.

Competing demand for space in the borough (from both residential and commercial) creates a challenging conundrum for the borough's economic future. Achieving a healthy balance between the two will support new economic development opportunities and address some of the challenges facing Haringey at the moment (including high deprivation and low employment growth).

## Snapshot

- + *Haringey has ambitions to deliver **19,580 homes** over the next ten years.*
- + *There are a number of **national trends** impacting on Haringey's economy, including Brexit, AI & related tech, changes to the high street and climate change.*
- + ***London-specific trends** include growing pressure on residential & commercial space, infrastructure improvements and the displacement of lower-value businesses.*
- + ***Housing & commercial development** will play an important role in setting the **right conditions** for economic development to take place.*

## Relevant Policy Context

Policy Document	Relevant Headlines
Draft New London Plan (2019)	<ul style="list-style-type: none"> <li>• Sets out the Mayor of London’s ambitions for spatial development across the Greater London area. It covers a range of topics, from design and housing to economic assets and social, sustainable and green infrastructure.</li> <li>• Core to the London Plan is a desire to build strong and inclusive communities, creating good and inclusive growth for all those living in the city. Aligned to this are a number of policies which aim to make the best use of land and space available.</li> <li>• It further identifies a number of Opportunity Areas (OA) across London, including one in Haringey: the Wood Green / Haringey / Heartlands OA. The plan describes this area as benefitting from “excellent, and (...) improving public transport connections and capacity”, making the location ideal for employment growth and service provision in North London. The key sites identified as having development potential are the Wood Green Cultural Quarter, the Clarendon Road Gas Works site and parcels of publicly-owned land near the High Road.</li> <li>• The ten-year housing target for the borough is also set in this Plan to 19,580 homes (or 1,958 homes per year).</li> </ul>
London Economic Development Strategy (2018)	<ul style="list-style-type: none"> <li>• Sets out ambitions to create a fairer and more inclusive London, with Londoners able to participate in, and benefit from, the city’s economic success. Some of the key pillars behind this strategy are delivering a world-class education, providing opportunities for all Londoners, lowering the cost of living, supporting fair pay and employment practices, better health and less poverty and creating inclusive and safe communities.</li> <li>• As part of the Good Growth Agenda defined in this strategy, the Mayor sets out a number of target sectors that London will need to support and grow, from the ‘Everyday Economy’ sectors (retail, construction, hospitality, tourism) to the higher value sectors such as ‘Advanced Urban Services’, ‘Cultural and Creative Industries’ ‘Financial and Business Services’, ‘Life Sciences’, ‘Low Carbon’ and ‘Tech &amp; Digital’</li> <li>• By bringing forward the Good Growth Agenda, the Mayor aims to increase the number of people in good quality work from 5.7 million in 2016 to 6.9 million in 2041.</li> </ul>
Skills for Londoners Strategy (2018)	<p>Sets out the skills challenges London faces, along with priorities and actions required to make the London skills system the envy of the world. Some of the key skills challenges are:</p> <ul style="list-style-type: none"> <li>• Unemployment rates above the national average, with young people, disabled adults, black, Asian, and minority ethnic (BAME) groups and women disproportionately under-represented in the labour market, especially in higher-skilled, better-paid jobs.</li> <li>• Continued and persistent gender, race and disability pay gaps and wages struggling to keep pace with the rising costs of living.</li> <li>• Low levels of qualifications and skills holding many Londoners back, particularly in literacy, English language, numeracy and digital.</li> <li>• A lack of an effective careers information, advice and guidance offer, limiting Londoners’ ability to upskill / reskill and progress in work.</li> <li>• The changing nature of work due to technological advancements and the increasing need for digital skills to find work and access public services.</li> <li>• The soaring cost of childcare posing a significant obstacle to parents - particularly women - accessing education and employment opportunities.</li> <li>• London has some of the best skills and employment support providers in the country, but the system as a whole is unable to tackle poverty, exclusion and inequality, adequately respond to Brexit or meet the other structural challenges the city faces because it is under-funded and fragmented.</li> </ul>

## Relevant Policy Context

### Policy Document

### Relevant Headlines

- London's Industrial Strategy (2019)**
  - The strategy is centred on inclusive growth, this growth will ensure an uplift in living standards benefiting all residence in the city with sustainability ensuring the growth does not cost future generations. The strategy sees improving productivity as a fundamental technique to increasing growth with tackling inequality as a means in which to improve productivity.
  - The strategy highlights London's structural strengths in attracting businesses and also acknowledges the diversity of London's business environment as well as outlining some key challenges such as the high cost of business space in the capital.
  - On infrastructure, there is a clear view that this may be an area of significant challenge for London, in part due to increased demand from a growing population, but also due to the lack of integration in some parts of London's infrastructure network..
- LSCC UK Innovation Corridor Growth Prospectus (2019)**
  - The UK Innovation Corridor, is a functional economic geography linking London to Cambridge and Peterborough, managed by the London Stansted Cambridge Consortium (LSCC). The LSCC brings together businesses and the public sector to promote the UK Innovation Corridor's (UKIC) leadership in advanced technology and bioscience and sustain the corridor's development as the most significant and productive corridor in the country. As one of the boroughs linking the North of London to the rest of the Corridor, Haringey Council is one of the 22 members which make up the UKIC. Although Haringey has a relatively low proportion of activity within the life sciences and tech sector, its transport connections and skills provide an important resource for activities taking place across the corridor.

	% of Employment in Life Sciences	% of Employment in Tech	Location Quotient (Specialisation) in Life Sciences	Location Quotient (Specialisation) in Tech
Haringey	0.1%	3.8%	0.2	0.5
LSCC	1.8%	8.7%	7.4	2.1
England	0.7%	7.2%	1.0	1.0

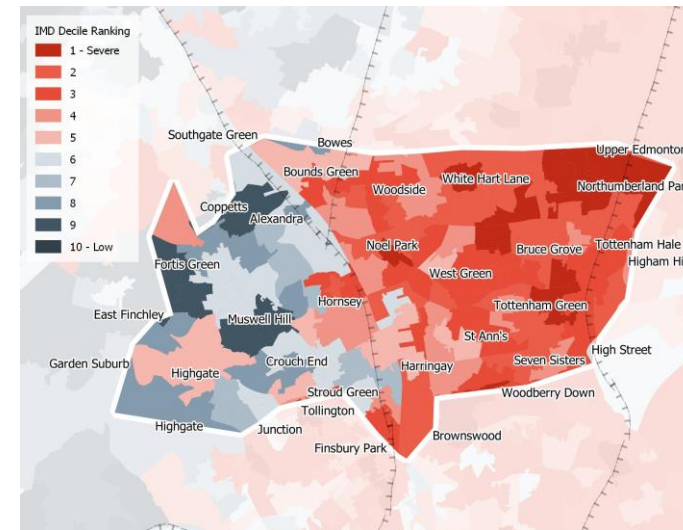
- London Industrial Land Demand (2017)**
  - There has been growing pressure on London's industrial land supply in recent years, with industrial land stock diminishing rapidly, and in excess of the planned release rate set out in the New London Plan. The London Industrial Land Demand report set a benchmark industrial land release figure for the period 2011-2031 at an average of 36.7 hectares per annum (CAG Consultants, 2017). However, in the period 2010-15, the rate of release was 101 hectare per annum – 2.7 times the equivalent SPG original target benchmark.
  - Haringey has seen the sixth largest decline in industrial floorspace over the 2011-2016 period (out of 32 London boroughs) and this has important repercussions for industrial jobs, especially in the warehousing and manufacturing sectors. Much of this has been lost to permitted development rights and office space/creative workspace.

## Recent Economic Change in Haringey

Haringey faces a number of socio economic challenges relating to:

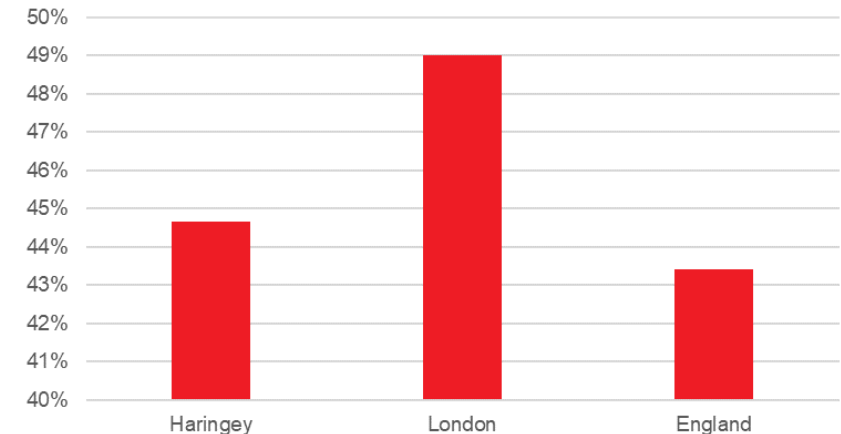
- + **Employment:** Haringey's employment growth over the 2010-18 period has been relatively low, ranking 21<sup>st</sup> out of London's 32 boroughs and the number of jobs in the borough has declined over the longer term (1971-2015).
- + **Income:** Income levels in Haringey are relatively low. Those who work in Haringey have relatively low incomes, with 29% of employee jobs in the borough being paid less than the London Living Wage.
- + **Businesses:** Performance of the business base is more positive. The number of businesses in Haringey grew over the 2010-18 period by 51%, ranking 11<sup>th</sup> out of the 32 London boroughs.
- + **Contribution to London's economy:** Haringey's contribution to London's total output in 2017 (in terms of regional Gross Value Added) was below 1% of the total, ranking 31<sup>st</sup> out of 32 boroughs.
- + **Inequality:** There is a stark divide across the borough – as illustrated by the deprivation map, with high levels of deprivation in the east of the borough compared to typically less deprived areas to the west.
- + **Educational attainment:** While Haringey's proportion of students attaining grade 5 or above in English and Mathematics GCSEs is higher than the national average, it performs worse than London

## Deprivation Levels, 2019



Source: IMD, 2019

## Percentage of pupils achieving grades 5 or above in English and Mathematics GCSEs, 2019



Source: IMD, 2019

## Wider Trends Impacting on Haringey's Economy

### National & International Trends

There are a number of major macro-economic factors which are expected to have an impact on the UK – and local – economy:

- + **Brexit** – uncertainty around the terms of Brexit over the next year is likely to have an impact on the performance of the UK economy. Although the full impact of Brexit is unknown, potential immigration restrictions are likely to have a big impact on Haringey's economy given its sector composition (increasingly in creative and professional services). According to the borough council, 1 in 6 Haringey residents are from the EU. Future UK-EU agreements on migration, even if all current EU residents continue to live and work in Haringey, will have implications on residents and workers in the borough.
- + **AI & Related Tech** – technological advancements, including robotics, drones and driverless vehicles have the potential to displace many jobs formerly done by humans, but it will also create additional jobs as productivity and real incomes rise and new and better products are developed.
- + **Rise of Online Shopping** – developments in technology are changing the way that the retail sector operates, with over 16% of retail spending in the UK currently done online (up from 9% 5 years ago). This

has had significant impacts on UK high streets, with retail units struggling to compete against online competitors on price.

- + **Climate Change % Net Zero Targets** – will change the way in which businesses operate, with the need for more environmentally friendly practices to meet national and global emission cutting targets. The Mayor of London has committed to making London a “zero carbon city” by 2050. Businesses and communities will be required to make changes in order to assist with this target, such as adhering to the minimum energy efficiency standards (MEES) building regulations to ensure buildings are as energy efficient as possible.
- + **Health and Social Care** - As with all areas of the country, Haringey is set to see a substantial rise in its over 65 population in the next 20 years. According to ONS population projections, Haringey will see a 73% increase of over 65s between 2020-2040, compared with a London-wide increase of 63% and a national increase of 41%. This implies the area will be more acutely impacted by growing health and social care needs that are necessary to serve this ageing segment of the population.

## Wider Trends Impacting on Haringey's Economy

### Regional Trends

Although the wider economic environment is set to be more uncertain in coming years, the outlook for the London economy remains generally positive. The GLA's Economic Outlook expects to see increases in the number of workforce jobs in 2017, 2018 and 2019, with household incomes and spending also expected to rise over the period.

The Mayor of London has set out his economic aspirations within the London Plan and the Economic Development Strategy to continue London's recent economic trajectory, with ambitious targets for housing growth and ambitions to create a fairer and more inclusive economy. In the *new London Plan*, the Mayor has set out a ten-year housing target of 649,350 net housing completions, with around 3% of these (19,580) expected to be in Haringey.

The *Mayor's new Economic Development Strategy* for London has ambitions for London to become the world's greatest city for business, being more productive and innovative, as well as ensuring that growth is 'good' – planned and sustainable.

London's economy has been steady despite wider uncertainty in the national economy. London's economy grew by 2.1% in real annual terms in the second quarter of 2019. However there are signs of uncertainty affecting

London's economy, with business trends at private sector firms and new business indices down in the first half of 2019. Despite this, consumer confidence is bucking a national trend in London, with consumers generally positive about their outlook.

There are a number of trends taking place across London relevant to the Haringey economy:

- + Rising pressure on industrial land is seeing strong growth in rental prices, as the supply of space diminishes and demand remains strong.
- + There is high demand for housing, with house prices close to record highs, despite recent declines over the last year (-1.4% between August 2018 and 2019).
- + Rising rents for residential and commercial space is leading to the displacement of resident and business communities, particularly from Central London.
- + Transport infrastructure investment, including the near-completion of the Elizabeth Line and potential for Crossrail 2, will reshape labour market areas in London and improve connectivity.

## Relationship between Housing and Economic Development

Haringey has ambitious housing targets to meet over the next ten years, with the London Plan setting a housing target of 19,580 homes (or 1,958 homes per year). Delivering these homes whilst also providing the space needed by growing local businesses is a significant challenge. Adding to this, Haringey has relatively high median house price compared to other boroughs.

Delivering housing is important if the borough is to continue its economic development. It can enhance economic performance, place competitiveness and ensure that people of all wealth levels are able to access good jobs in the area. This enhances the productivity potential of the area and helps local businesses tap into a wider pool of skills, experience and backgrounds.

However consideration should be given to the economic needs of areas undergoing housing development. If done in isolation from the wider economic context, housing development can lead to segregation and spatial concentrations of poverty.

There is a growing body of national research that recognises the links between housing and economic development. The New Homes Bonus alongside increased Council Tax and local spending (and hence business rates) will increase the funds Haringey has at its disposal to reinvest in economic development.

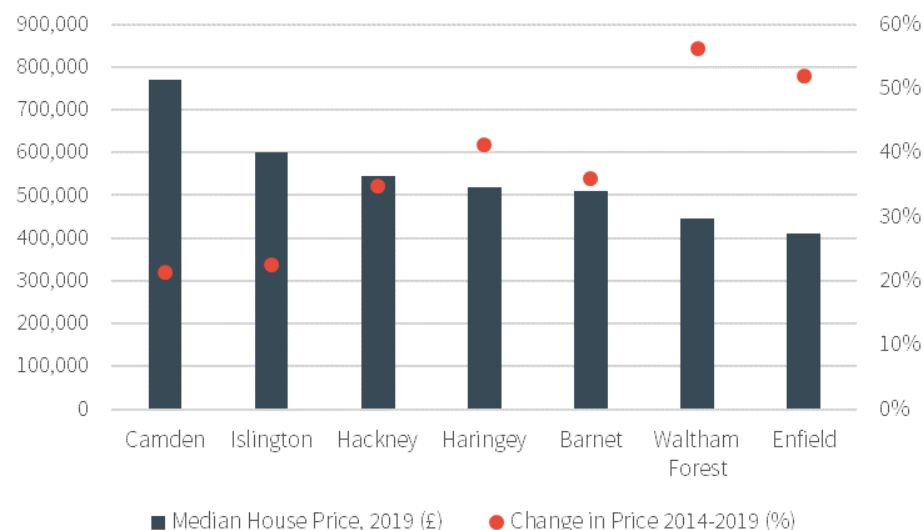
To ensure new development supports economic growth (and the five key success measures), Haringey must demand more from development which takes place to maximise the economic development opportunities that might arise from these and support the five key success areas. In particular, this means considering developments which can:

- + Provide the right sort of housing to attract a diverse and skilled

workforce and which can service Haringey's growing sectors.

- + Help stimulate town centres and the cultural and creative economy.
- + Generate good jobs for local people which pay at least the Living Wage.
- + Deliver improved schools and educational facilities.
- + Create high-quality physical infrastructure and public realm.

Median House Price in Haringey and Comparator Areas, 2019



## Unemployment and Economic Inactivity

Across Haringey, there are high levels of unemployment amongst those people with disabilities and ethnic minority groups (especially ethnic minority males).

This trend is also observed across economic inactivity rates, which tend to be higher amongst those people with disabilities (especially female), and ethnic minority groups.

Economic Inactivity by Different Demographic Categories, 2019



Unemployment by Different Demographic Categories, 2019



Source: Annual Population Survey, 2019

## 2. Employment



## Introduction & Overview

### Introduction

This section provides an overview of the current employment landscape within Haringey, establishing a profile of the borough's jobs, the occupations in which its residents work and the wages these jobs pay.

This is an important section in helping to identify Haringey's current progress on many of the five headline measures of success identified by the New Economics Foundation, including good jobs, wellbeing and fairness.

### Overview

Haringey currently has a relatively strong labour market, with high levels of participation, low levels of unemployment and strong skills levels. More than three-quarters of Haringey's working age population are currently economically active, with the unemployment rate well below the level experienced across London. There are still challenges around economic participation in some groups, particularly people from ethnic minority backgrounds.

Recent employment growth in the borough has been relatively slow; Haringey is the sixth slowest growing borough in London over the last five years. Employment is projected to continue growing, albeit at a rate of growth below the London level. Haringey has a high net-outflow of commuters, particularly into Central London, reflecting the strong transport connections the area has. This brings wealth into the area, but does mean that those working in Haringey earn less than those working in comparator areas.

Social mobility and deprivation are challenges for the borough, particularly towards the East. The Social Mobility Index ranks Haringey 25<sup>th</sup> out of 32 London boroughs, with a number of neighbourhoods among the 10% most deprived nationally.

## Snapshot

- + *Haringey has a relatively **strong labour market**, but has some challenges around **inclusion** in some demographic groupings.*
- + *Haringey is the **sixth slowest growing borough** in terms of employment growth over the last five years.*
- + *There is a **net-outflow of 43,321 workers** from the borough each day.*
- + *The East of the borough has high levels of **deprivation** and low levels of **social mobility**.*
- + *The average person living in Haringey **earns over £5,200 more** than the average person working in Haringey.*

## Strong labour market, with low levels of unemployment...

Haringey currently has a relatively strong labour market, with low levels of unemployment, and an economic activity rate comparable to the rest of London.

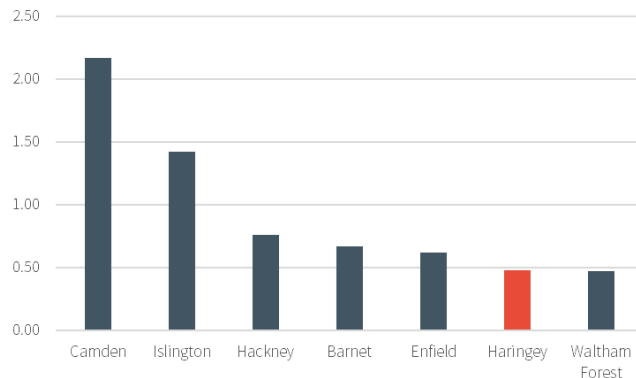
Currently 78% of Haringey's working-age population are economically active, a similar level to London (78%). Haringey compares well against comparator areas, only being outperformed by Waltham Forest and Islington.

The employment rate of Haringey's working-age population is also strong, with three-quarters of the population currently in work.

The unemployment rate is 3.8%, which is the second lowest amongst the comparator areas and sits below the London rate of 4.8%.

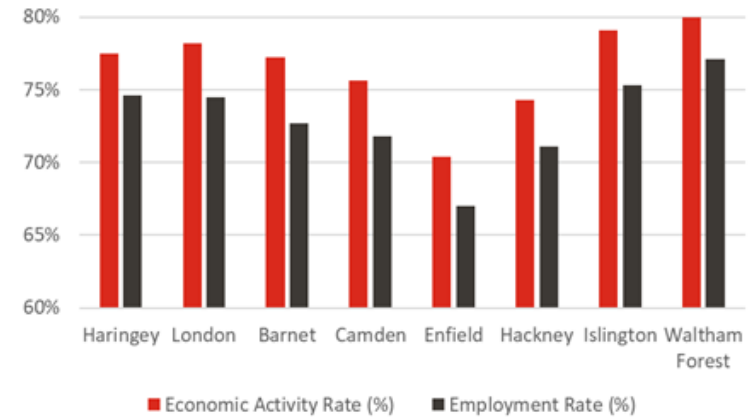
Haringey has a lower job density than most comparator areas, with 0.5 jobs per working-aged resident.

### Job Density for Haringey and comparators, 2018

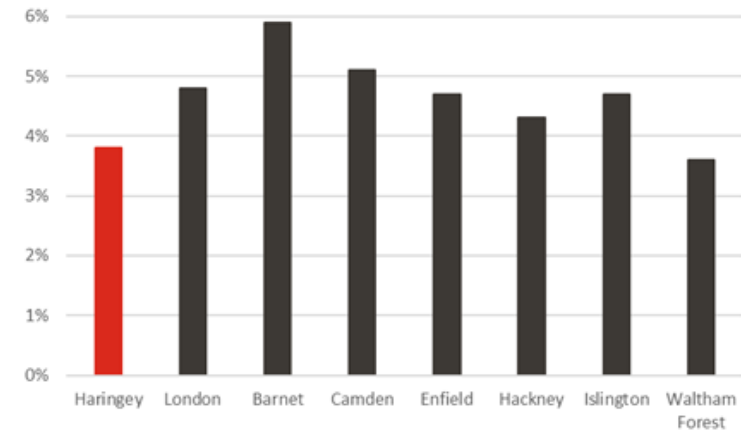


Source: Annual Population Survey, ONS, 2019

### Economic activity and employment rates (%) for Haringey and comparators, 2019



### Unemployment rate (%) for Haringey and comparators, 2019



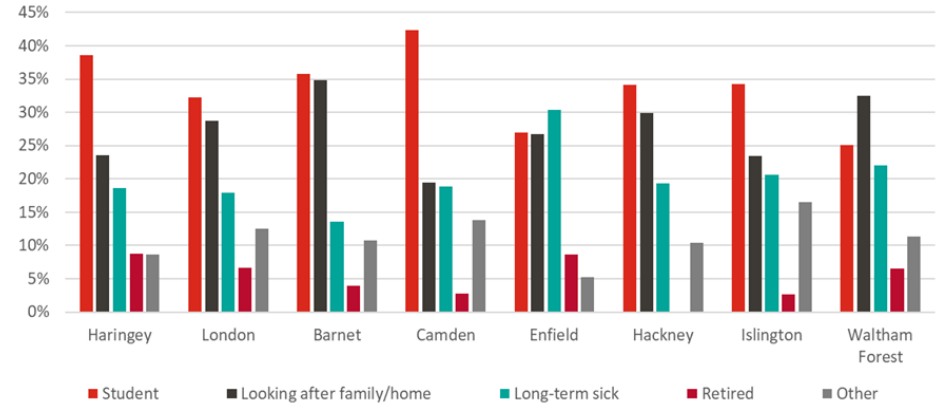
## Low levels of economic inactivity, particularly amongst 25 to 49 year olds...

Common reasons for economic inactivity include studying, looking after family/home and being long term sick. Studying and retirement appear to be larger drivers of economic inactivity in Haringey than in other areas.

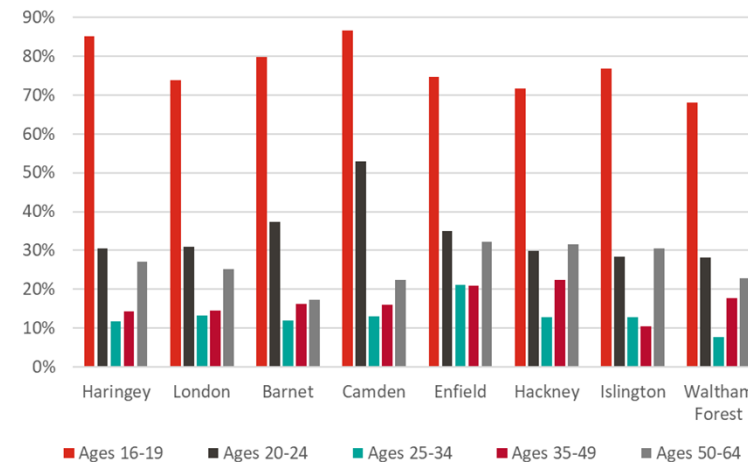
The proportion of the population who are economically inactive also varies across age ranges. Those who are aged 16-19 are typically the most economically inactive, although this reflects the fact that many of them are currently studying.

Haringey has relatively low levels of economic inactivity amongst those aged between 25-49, being the second lowest ranked borough relative to comparator areas (and below the London average).

Percentage (%) of economically inactive by reason in Haringey and comparators, 2019



Percentage (%) of economically inactive in Haringey and comparators by age, 2019



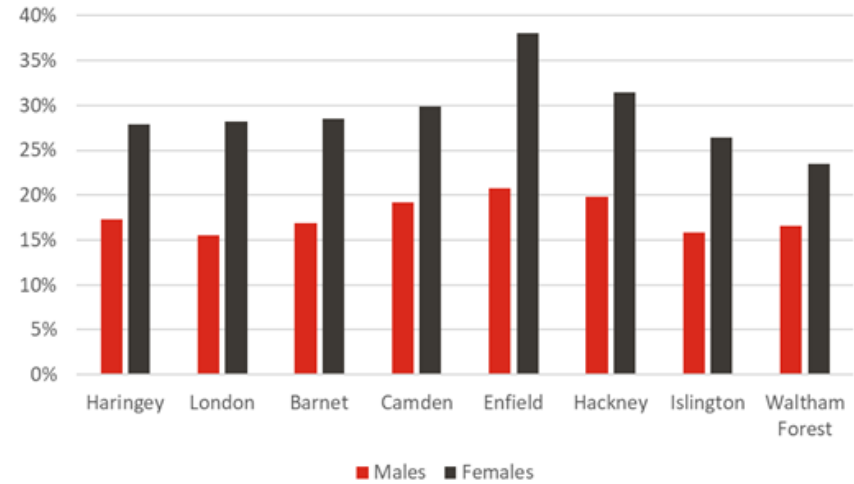
Source: Annual Population Survey, ONS, 2019; Population Estimates, ONS, 2018

## Varying levels of economic participation, based on demographic factors...

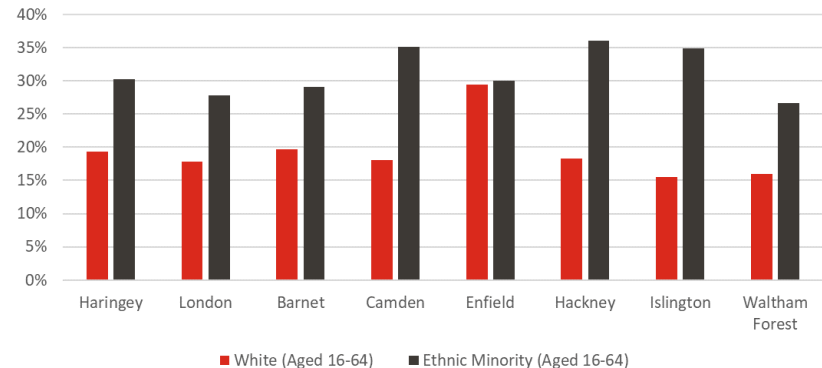
Men in Haringey (and London) have much lower levels of economic inactivity (11 percentage point gap) than women. Data from the Annual Population Survey shows this is largely due to a higher proportion of women who are out of the workforce looking after family and/or home. This gap is slightly below the gap experienced across London (13 percentage point gap) with Haringey having one of the lowest women's economic inactivity rates relative to the comparator areas. By comparison the economic inactivity rate for men is slightly above the London-level (17% relative to 15% across London), with this rate around average relative to comparator areas.

Ethnic minorities tend to have a higher rate of economic inactivity. Amongst the white population in Haringey, 19% are economically inactive compared to 30% of those from an ethnic minority background. This 11 percentage point gap is similar to the London pattern (10 percentage point gap).

Percentage (%) of economically inactive by gender in Haringey and comparators, 2019



Percentage (%) of economically inactive whites and ethnic minorities in Haringey and comparators, 2019



## Relatively small employment base, with high levels of part-time employment...

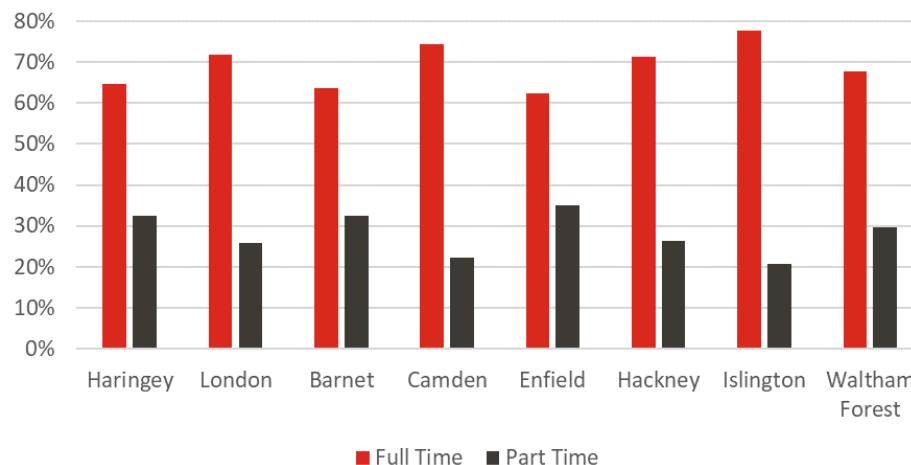
There are a total of 92,000 jobs in Haringey, accounting for 2% of all jobs in London. By comparison, Haringey is home to 3% of London's population (if it was to have the same proportion of residents as jobs, as a proportion of London's level, Haringey would need nearly twice as many jobs).

Nearly two-thirds of jobs in Haringey are full-time, with the share of part-time employment being higher in Haringey relative to its comparators. Only Enfield and Barnet have higher shares of part-time employment.

Levels of full-time and part-time work vary across age ranges. Those aged between 20-24 and 50+ are more likely to be in part-time employment, whereas a higher proportion of those aged 25-49 tend to be in full-time employment.

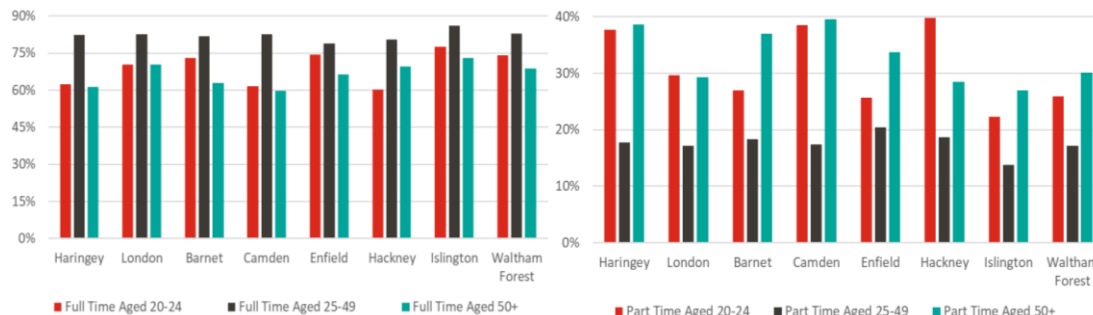
Further examination of Haringey's residents in full time and part time work shows that 69% of part time employment in the borough is filled by women while well over half of those in full time employment (62%) are men.

Full-time, part-time in Haringey and comparators, 2018



Note: BRES self-employment is calculated as the difference between employment and employees. It only captures self-employed workers registered for VAT or PAYE schemes.

Percentage (%) in Employment Working Full-time and Part-time by age, 2019



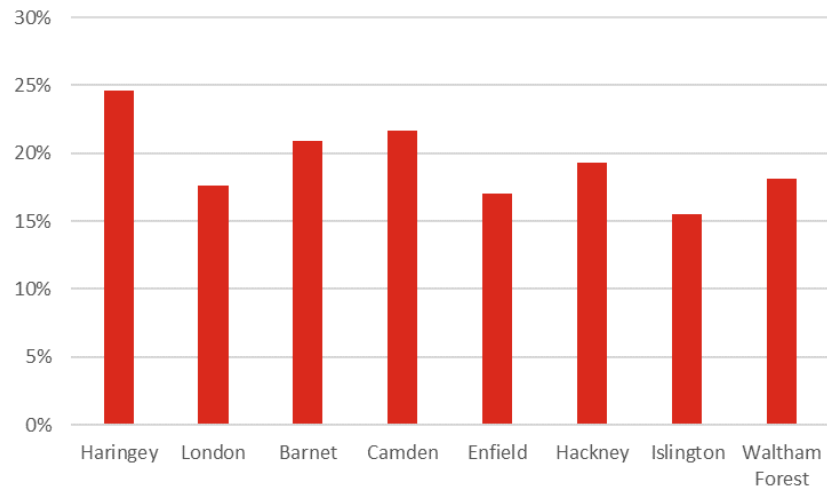
## Strong representation of self-employed people in Haringey...

Data from the Annual Population Survey, finds that a quarter of those in employment are self-employed in Haringey. This is the highest level amongst comparator boroughs, and seven percentage points above the London level.

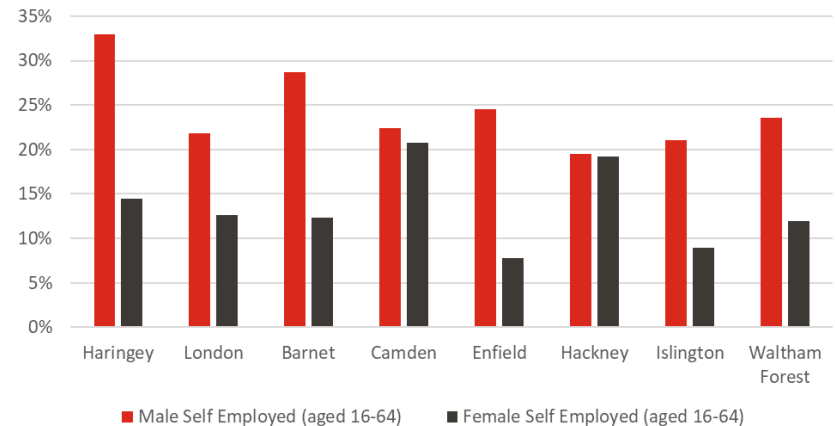
High levels of self-employment suggests there are a high number of freelancers located in the borough or that the entrepreneurial level is high in the borough.

At about 19 percentage points (pp), Haringey exhibits the largest differential between the proportion of male and female people in work that are self employed. This is approximately 9 pp higher than the variation across London.

% of Employed 16-64 year olds who are Self-Employed, 2019



Self Employment by Gender, 2019



## Strong representation of self-employed people in Haringey...

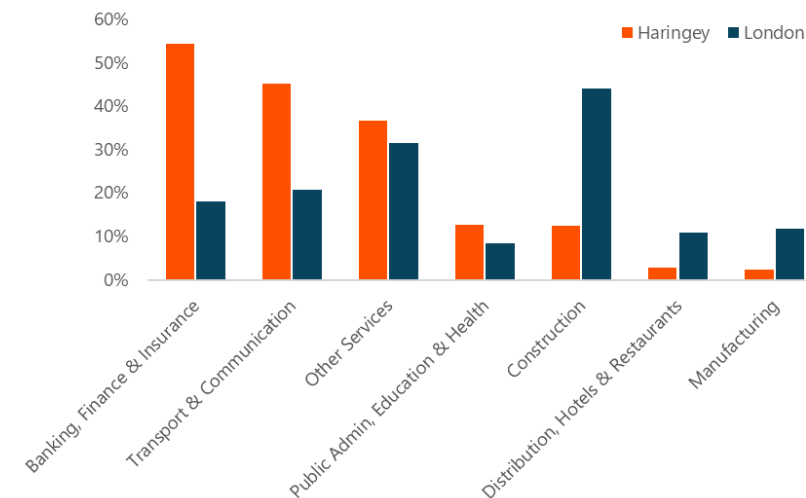
As mentioned previously, self-employment levels in Haringey are among the highest in London, with nearly a quarter of those in employment being self-employed.

Those who are self-employed are generally in higher-value occupations and sectors.

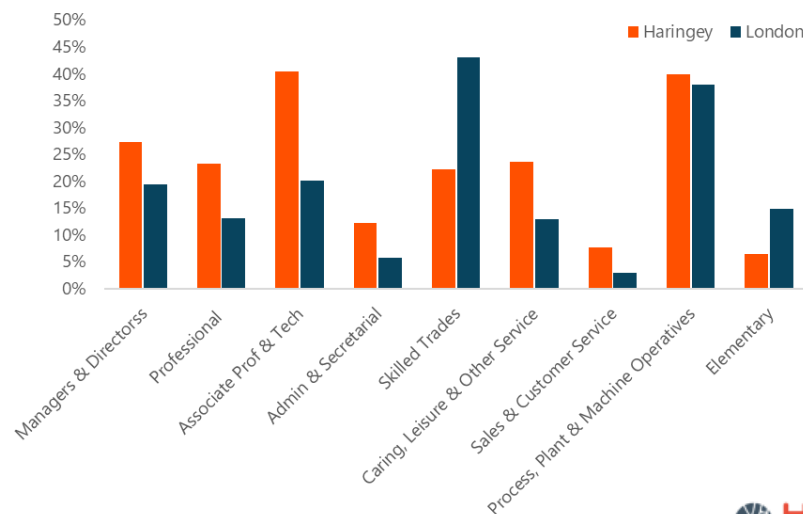
When analysed by sector, nearly half of banking, finance & insurance employment in Haringey is self-employed people – a proportion far above the London level. Self-employment also accounts for a high proportion of activity in transport & communication and other services (which includes the creative sector). By comparison there is a much lower proportion of self-employment in the construction sector compared to the rest of London.

When analysed by occupation, Haringey tends to have a higher proportion of self-employment in higher value occupations, including managers & directors, professionals and associate professional & technical occupations compared to the London level. By comparison there is a much lower proportion of self-employment within the skilled trades occupations compared to London.

Self Employment by Sector, 2019



Self Employment by Occupation, 2019

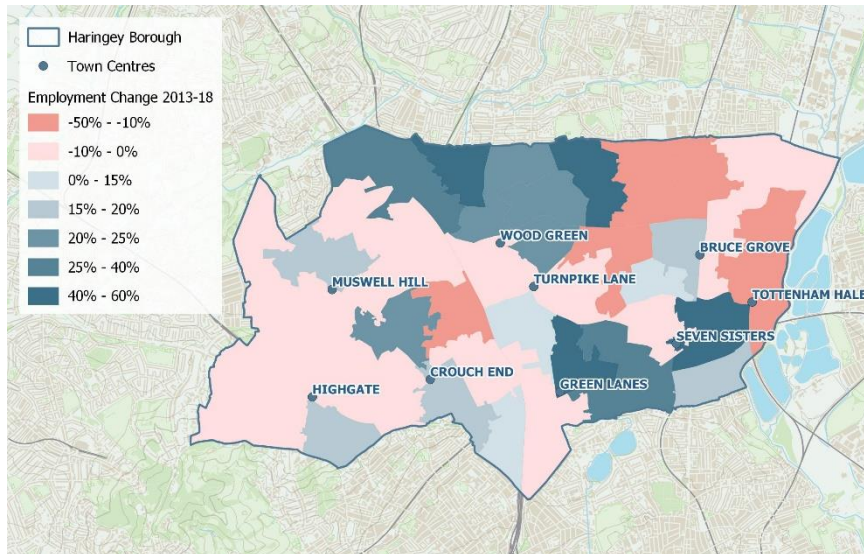


## Haringey lags behind London's employment growth, with patchy performance across the borough...

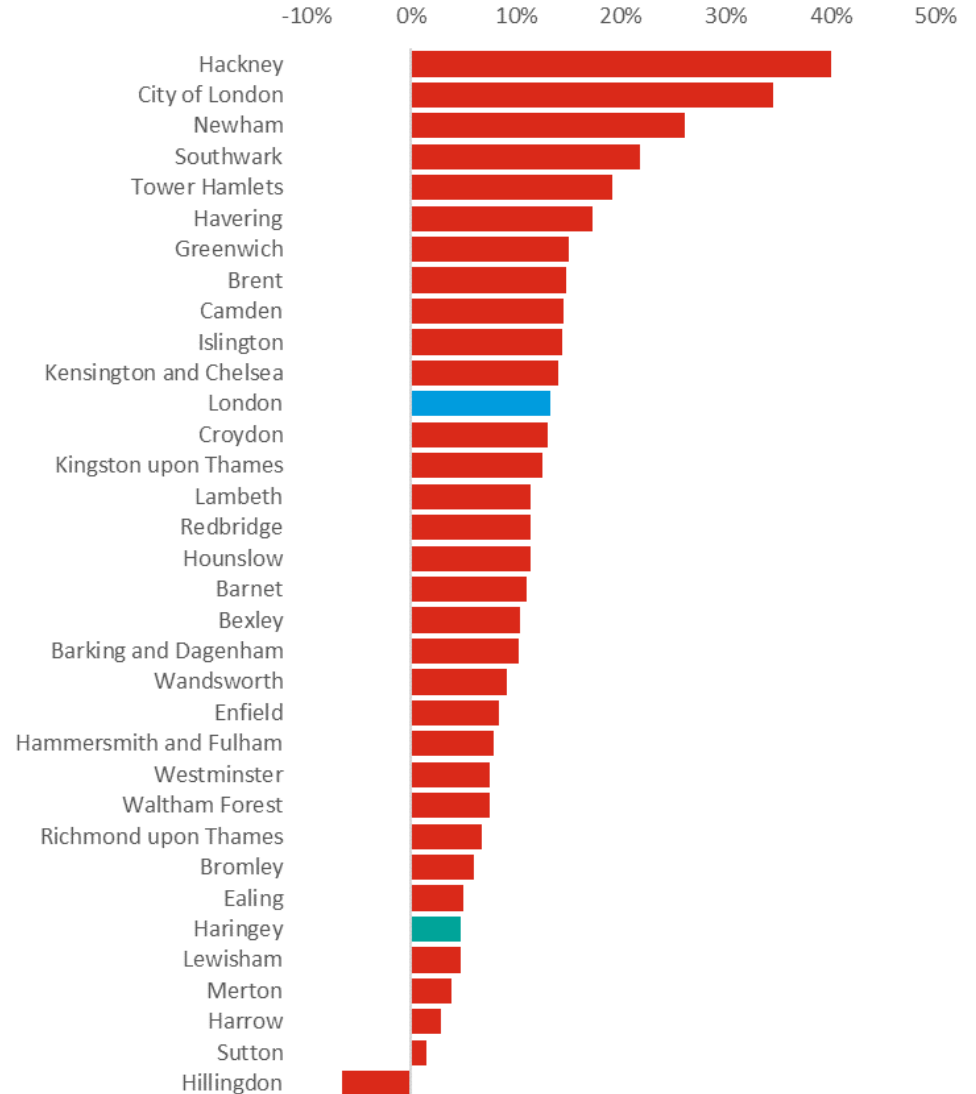
Relative to other London boroughs, Haringey has experienced slow employment growth over the last five years, being the sixth slowest growing borough in London.

When analysed spatially within the borough, strong employment growth has been experienced around the South East of the borough, in particular around Seven Sisters and Green Lanes, and to the North West, around Wood Green. Negative employment growth has occurred around Tottenham Hale and to the north of Crouch End.

Employment Growth, 2013-18 by MSOA



Employment Growth, 2013-18 by London borough



Source: Business Register and Employment Survey, 2019

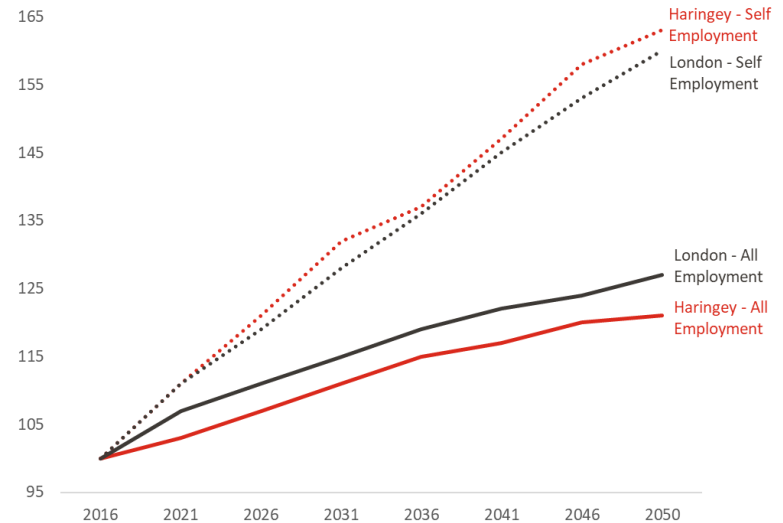
## Strong employment growth expected in the future, but behind London projections...

Evidence in the Haringey Employment Land Study (which draws on a range of GLA, Atkins and Experian employment projections), expects that between 3,070 and 22,000 new jobs are expected to be created over the next 18 years.

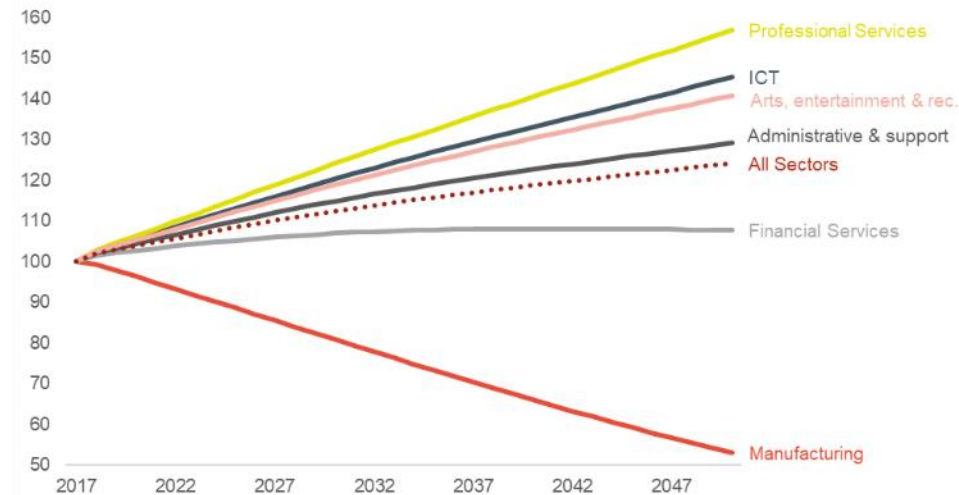
Stronger than average employment growth is expected amongst the self-employed group, particularly in Haringey, with this reflecting the growing presence of entrepreneurs already in the borough (which is expected to grow into the future). Although strong growth is expected, self-employment will still be lower than overall employment, accounting for 29% of all employment (compared to 21% at present).

Sector projections for London (this is not broken down by borough) suggests that professional services, ICT and arts, entertainment & recreation are those sectors expected to grow fastest in the future. These sectors best represent many of the activities taking place in the creative sector in Haringey, and shows there is likely to be strong demand from these sectors in the future. Ensuring the right type of space is made available for these sectors is important to enable their continued growth in the future.

### Expected Employment Trends, Haringey & London



### Expected Employment Sector Trends, London



## Concentration of activity in high-value occupations...

Haringey's workforce is employed across a wide range of occupations. The most common occupations includes professional, associate professional & technical, and directors & senior officials. Combined these occupations account for more than half of Haringey's workforce.

Haringey's occupational profile is broadly in line with the London average, with a combined 58% of workers working in the three occupations cited above. Although similar to the London average, it lies below Islington (71%) and Camden (75%), reflecting a higher concentration of high-value activities in these areas.

Haringey's strength in the manufacturing sector is reflected in its occupation profile, with Haringey having a higher proportion of workers in skilled trades occupations compared to London, accounting for 11% of employment in Haringey compared to 7% across London.

Employment by major occupational group, 2019

	Haringey	London	Barnet	Camden	Enfield	Hackney	Islington	Waltham Forest
Professional occupations	26%	26%	31%	32%	23%	31%	36%	24%
Associate prof & tech occupations	20%	19%	14%	24%	17%	22%	22%	18%
Managers, directors and senior officials	12%	13%	15%	19%	11%	9%	13%	7%
Skilled trades occupations	11%	7%	8%	5%	8%	4%	3%	10%
Elementary occupations	9%	8%	7%	5%	10%	9%	4%	8%
Administrative and secretarial occupations	6%	9%	12%	5%	11%	6%	8%	11%
Caring, leisure and other service occupations	6%	7%	5%	4%	7%	7%	6%	8%
Sales and customer service occupations	6%	6%	5%	3%	5%	6%	5%	6%
Process, plant and machine operatives	5%	5%	3%	4%	8%	3%	3%	8%

## Net outflow of commuters to Central London, with local travel-to-work patterns..

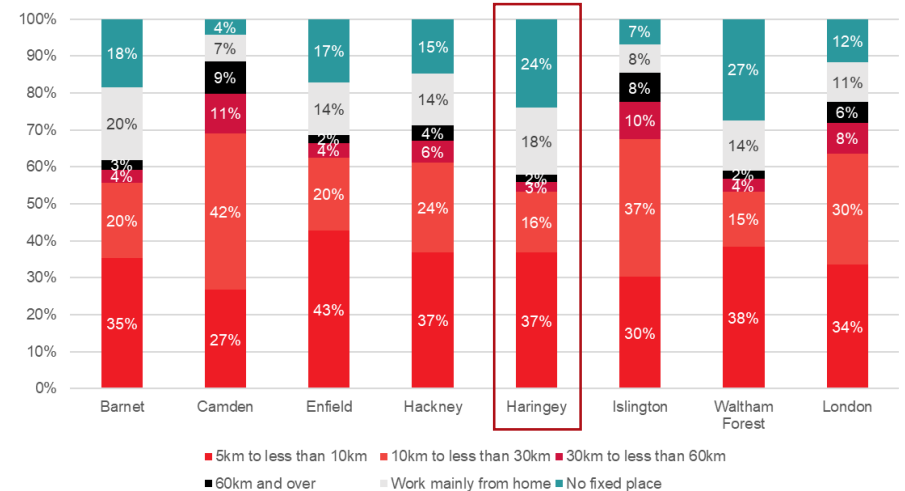
Census 2011 data provides the latest analysis on travel to work patterns at the Haringey level.

This reveals that around 15% of Haringey's population works from home, with a further 60% travelling less than 30km to their place of work. Only 4% of Haringey's population reported travelling further than 30km to their place of work, suggesting a relatively small labour market catchment area (which broadly covers the whole of London).

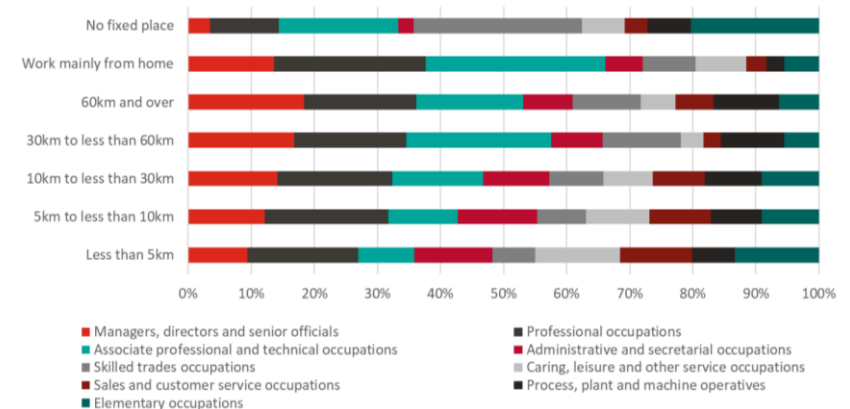
The graphic overleaf shows the flows of workers into and out of Haringey each day. Haringey has a net-outflow of 43,321 workers per day, with popular destinations for Haringey's residents including Westminster, City of London, Camden and Islington. Enfield, Barnet and Waltham Forest are the most common locations from which people travel to Haringey for work.

There is a direct relationship between the level of occupation and distance travelled to work – those travelling longer distances to work are more likely to be employed as managers, directors and senior officials, or in professional occupations.

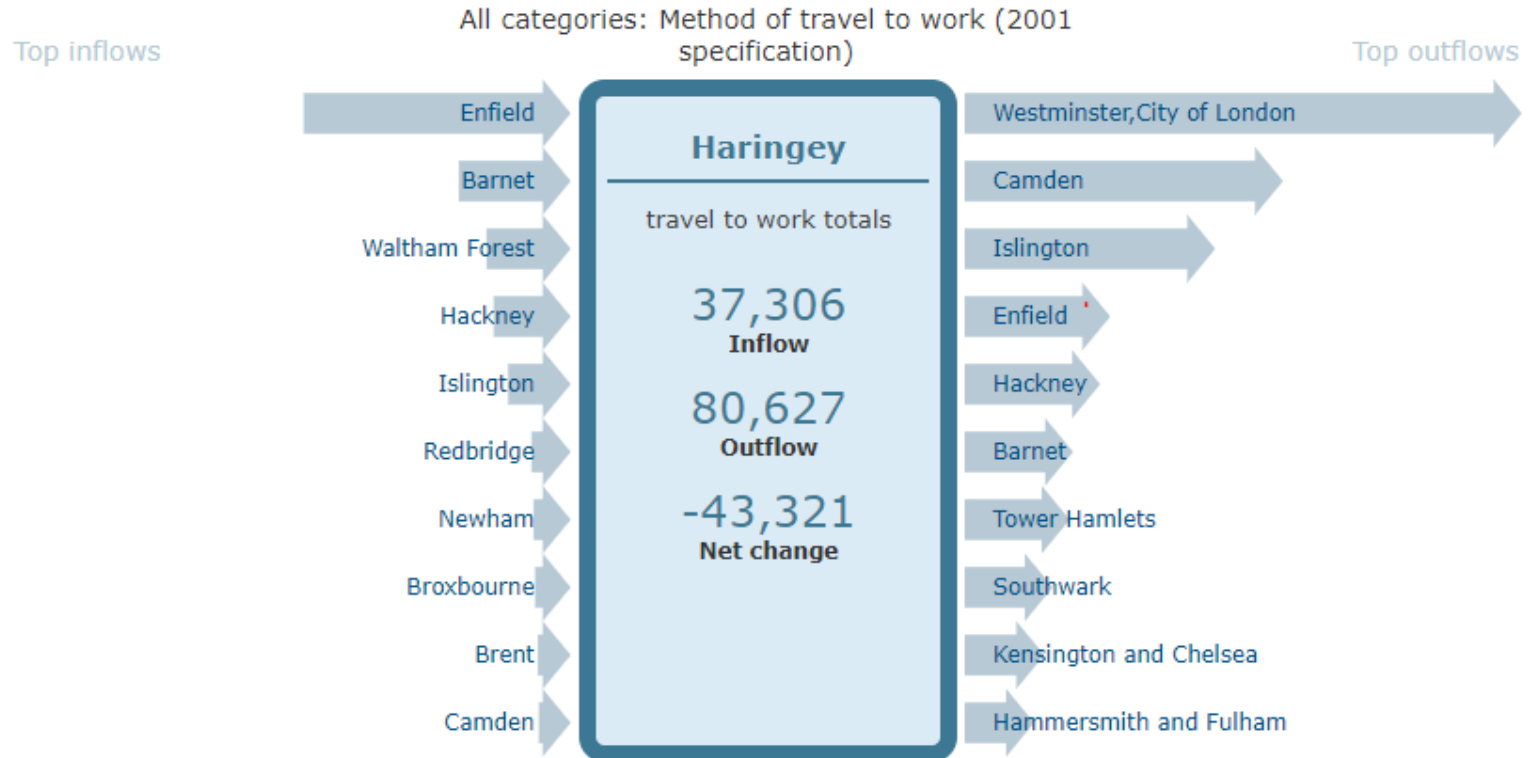
Distance Travelled to Work (Workplace Population) in Haringey, surrounding boroughs and London, 2011



Distance Travelled to Work (Workplace Population) by Occupation in Haringey, 2011



## An Out-commuting Population to Central London...



Commuting totals (all categories: method of travel to work (2001 specification)) for Haringey:

- Inflow: **37,306** person(s) commute into Haringey from other local authorities in the UK.
- Outflow: **80,627** person(s) commute out of Haringey to other local authorities in the UK or abroad.
- Net change: Overall, commuting results in a population decrease of **43,321** in Haringey.

## Characteristics of Haringey's Outgoing Population

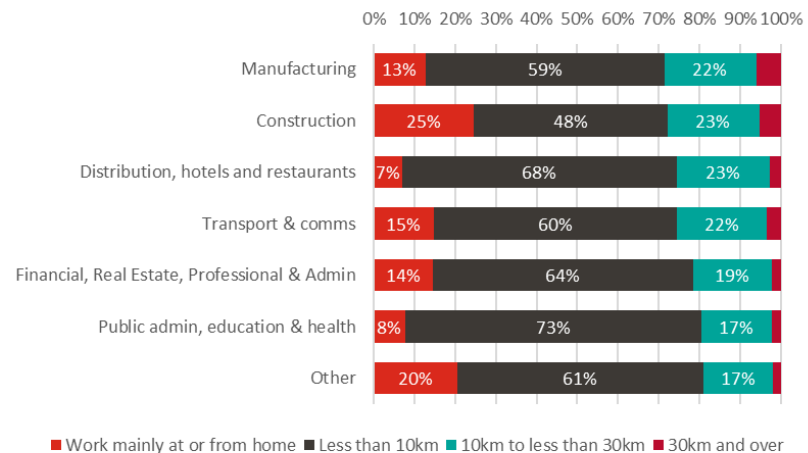
Census data provides an indication as to the characteristics of those who are commuting longer distances to work. Data is only available based on distance travelled to work, with the 'less than 10km' category, does incorporate much of Central London.

Sectors in which people travel greater distances for work include manufacturing, construction and distribution, hotels and restaurants.

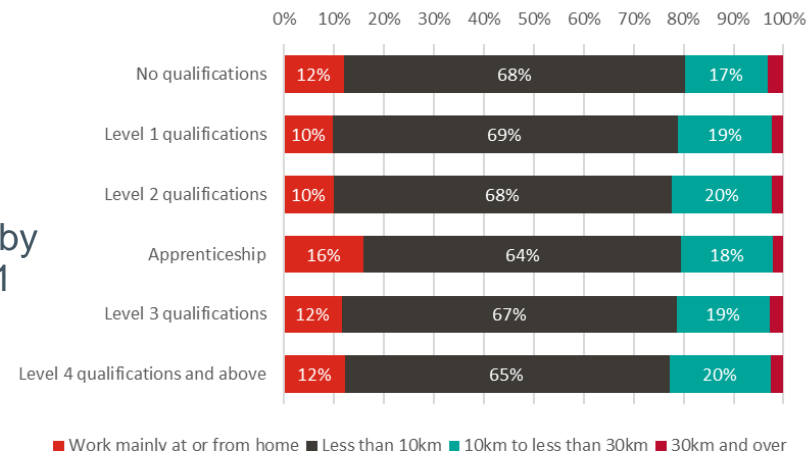
There is very little variation in relation to qualification levels achieved, which differs from national trends in which higher qualified individuals tend to travel further for employment. This partly reflects Central London being captured within the 'less than 10km' data, which distorts the pattern.

In relation to ethnicity, again there is little variation between those from white or ethnic minority backgrounds, with a slightly higher rate of homeworking for those of a white ethnicity.

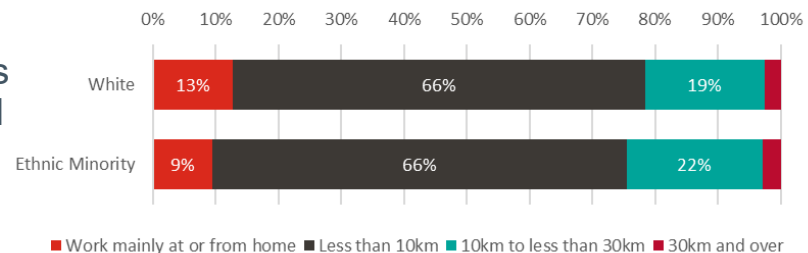
Sector worked in by Haringey's residents, by distance travelled to work, 2011



Highest level of qualification of Haringey's residents, by travelled to work, 2011



Ethnicity of Haringey's residents, by travelled to work, 2011



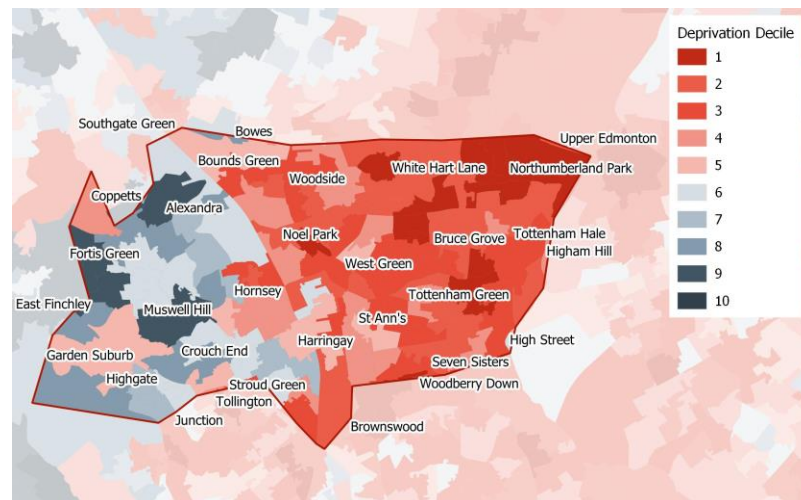
## Relatively high levels of Deprivation to the East of the borough...

The English Index of Multiple Deprivation (IMD) were published by the Department for Communities and Local Government in 2019. The indices measure relative levels of deprivation in almost 33,000 small areas or neighbourhoods called Lower-layer Super Output Areas (LSOAs) in England by combining and ranking indicators for domains such as employment and income, health, education and skills, crime, housing, and living environment.

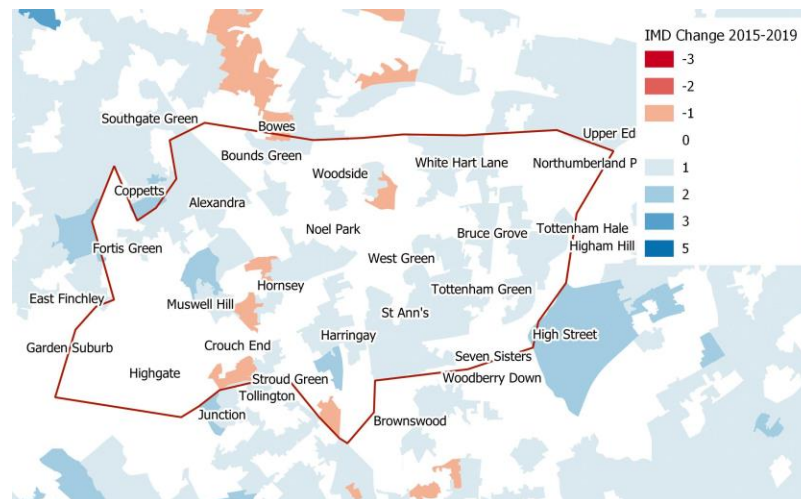
The index reports a high level of deprivation to the east of the Borough, relative to the West.

The previous IMD was published in 2015. Comparison between the 2015 and 2019 indices shows that deprivation levels have stayed roughly the same over the past four years, with a couple of areas getting worse relative to other areas, particularly around Tollington, Hornsey and Woodside.

General Deprivation in Haringey, 2019



Change in General Deprivation in Haringey, 2015-19

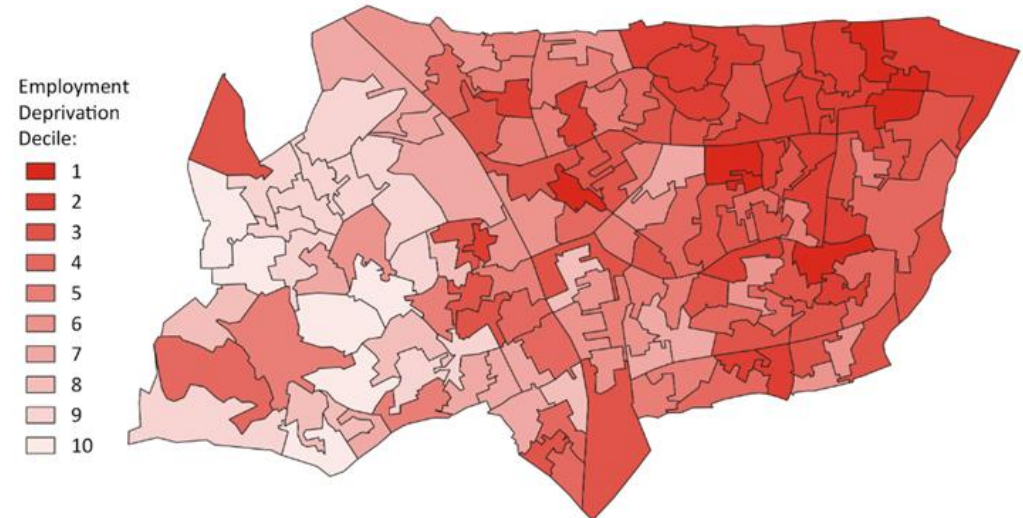


## Relatively high levels of Employment Deprivation to the East of the borough...

Of particular relevance to understanding the ability of people to access employment opportunities, the adjacent map shows the employment sub-domain of the Index of Multiple Deprivation 2019. This measures the share of working age population that is involuntarily excluded from the labour market.

There is a marked disparity in employment opportunities across the borough, following a similar pattern to overall levels of deprivation. There is a concentration of employment deprived areas to the east of the borough, whereas areas to the south west of the borough are amongst the least employment deprived in England.

Employment Deprivation in Haringey, 2019



*Note: In the figure, the most deprived 10% of LSOAs is indexed by 1.*

## Poor levels of Social Mobility relative to other boroughs...

The Social Mobility Index ranks local authorities based on the prospects of disadvantaged young people growing up in their areas. This includes a range of indicators, including the performance of education institutions in a local authority, job prospects, home ownership and qualifications. Haringey is ranked 34<sup>th</sup> out of 324 local authorities nationally, with many London boroughs experiencing high ratings due to the strong performance of schools locally and employment opportunities available.

Relative to other London boroughs, Haringey ranks in the bottom quarter, ranked 25<sup>th</sup> out of 32 London boroughs scored in the Social Mobility Index (excluding the City of London). The ranking which performs worst is the adulthood rank, which reflects indicators relating to salary and employment prospects for those from disadvantaged communities.

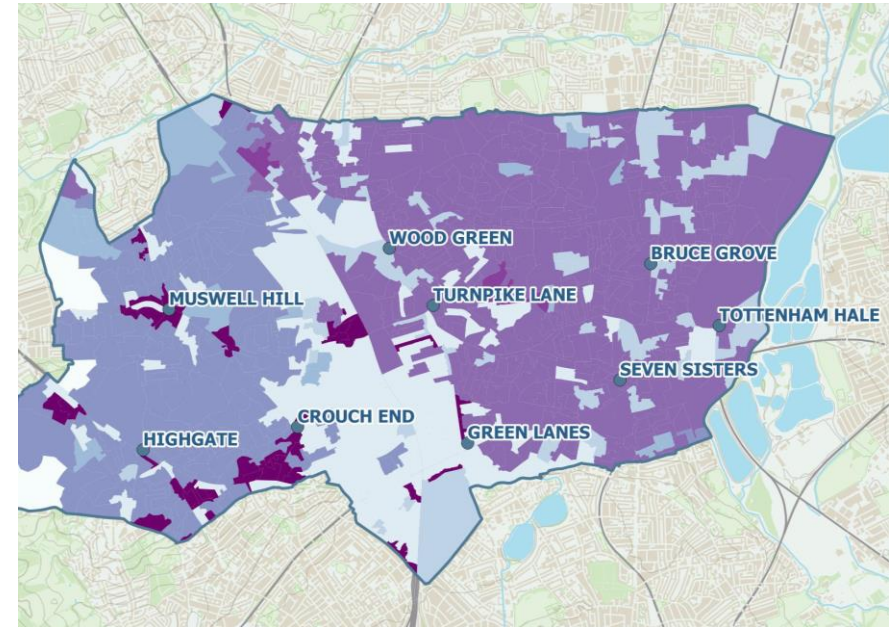
	Borough	Overall Rank	Early Years Rank	Schools Rank	Youth Rank	Adulthood Rank
London Rank <i>(out of 32 boroughs)</i>	Hackney	5 <sup>th</sup>	3 <sup>rd</sup>	2 <sup>nd</sup>	12 <sup>th</sup>	23 <sup>rd</sup>
	Islington	7 <sup>th</sup>	12 <sup>th</sup>	13 <sup>th</sup>	13 <sup>th</sup>	5 <sup>th</sup>
	Barnet	9 <sup>th</sup>	9 <sup>th</sup>	11 <sup>th</sup>	14 <sup>th</sup>	21 <sup>st</sup>
	Camden	14 <sup>th</sup>	31 <sup>st</sup>	10 <sup>th</sup>	17 <sup>th</sup>	4 <sup>th</sup>
	Waltham Forest	17 <sup>th</sup>	4 <sup>th</sup>	18 <sup>th</sup>	10 <sup>th</sup>	30 <sup>th</sup>
	<b>Haringey</b>	<b>25<sup>th</sup></b>	<b>15<sup>th</sup></b>	<b>22<sup>nd</sup></b>	<b>16<sup>th</sup></b>	<b>29<sup>th</sup></b>
	Enfield	29 <sup>th</sup>	25 <sup>th</sup>	24 <sup>th</sup>	20 <sup>th</sup>	27 <sup>th</sup>
National Rank <i>(out of 324 boroughs)</i>	<b>Haringey</b>	<b>34<sup>th</sup></b>	<b>76<sup>th</sup></b>	<b>27<sup>th</sup></b>	<b>16<sup>th</sup></b>	<b>311<sup>th</sup></b>

## Highly diverse population, with a mix of population groupings...

The profile of Haringey's population is categorised within the London Output Area Classification. This shows there is a high proportion of areas are typically classified as multi-ethnic suburbs or City Vibe. These areas typically have relatively young adult populations and are either young single professionals or young families. These categories account for nearly two-thirds of areas in Haringey.

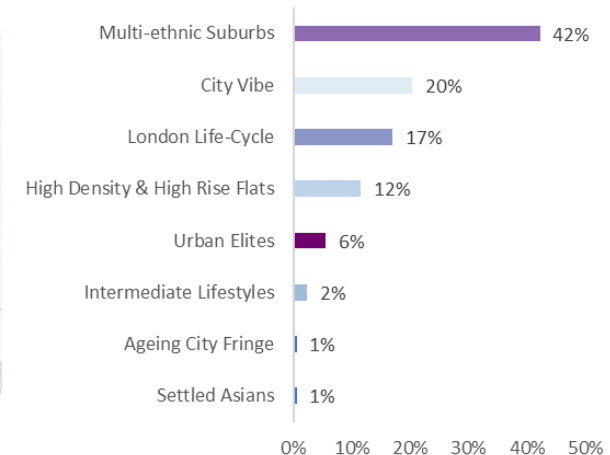
### The Main Group Characteristics in Haringey

Multi-ethnic suburbs	City Vibe	London Life-Circle	High Density & High Rise Flats
<ul style="list-style-type: none"> <li>• Non-White ethnic groups</li> <li>• Young children of school age</li> <li>• Blue collar occupations</li> <li>• Higher levels of unemployment</li> </ul>	<ul style="list-style-type: none"> <li>• Young single professionals</li> <li>• Full time students</li> <li>• Rent in private sector</li> <li>• Highly qualified</li> </ul>	<ul style="list-style-type: none"> <li>• Predominately white</li> <li>• Highly qualified, and high-level occupations</li> </ul>	<ul style="list-style-type: none"> <li>• Young children of school age</li> <li>• Densely populated</li> <li>• Main language not English</li> <li>• Lower qualification levels</li> </ul>



### Characteristics of Groups Not Strongly Represented in Haringey

Urban Elites	Intermediate Lifestyles	Ageing City Fringe	Settled Asians
<ul style="list-style-type: none"> <li>• Young professionals employed in finance, IT, science, tech</li> <li>• Rent in the private sector</li> <li>• Likely to be white or from pre 2001 EU countries</li> </ul>	<ul style="list-style-type: none"> <li>• Older population</li> <li>• Few households have dependent children</li> <li>• Lower qualification &amp; employment levels</li> </ul>	<ul style="list-style-type: none"> <li>• Predominately over 45</li> <li>• Very low levels of ethnic minorities</li> <li>• Low qualifications and low unemployment</li> </ul>	<ul style="list-style-type: none"> <li>• Traditional single-family homes</li> <li>• Main language not English</li> <li>• Asian origin</li> <li>• Wide range of non-professional occupations</li> </ul>



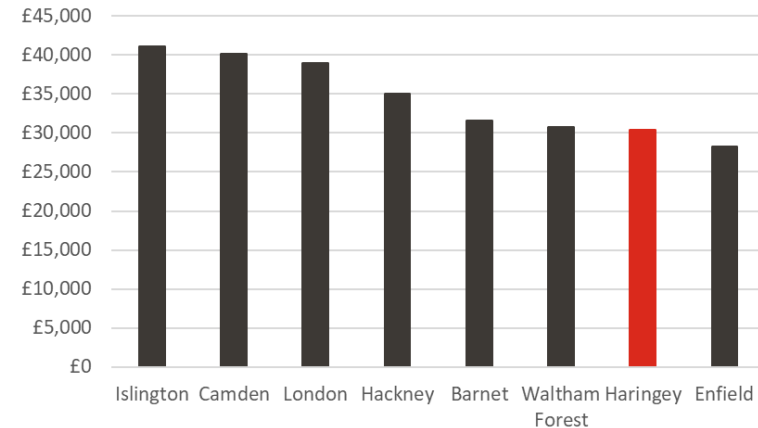
## Relatively low wages achieved by those working in the borough...

Workplace wage levels in Haringey are relatively low compared to the London average and comparator areas. Haringey has the second lowest wages of the other boroughs considered, with the average worker in Haringey earning £30,452 per year and the average resident earning £35,769 per year. The gap between the earnings of workers and residents in the borough reflects the higher earnings of those who commute elsewhere (primarily Central London), who return to the borough with higher incomes.

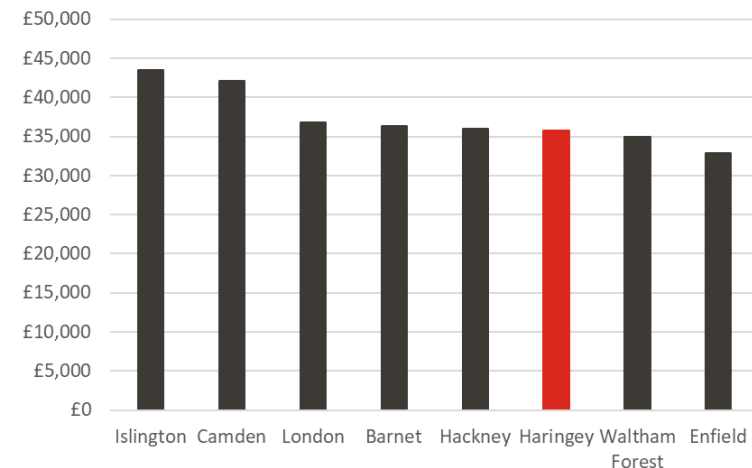
Overall workplace wages in Haringey are £8,500 below the average across the London area. This partly reflects the higher-level occupational profile of employment within London's Central Activity Zone (CAZ), however the borough also has lower workplace earnings relative to Waltham Forest and Barnet.

The earnings of Haringey's residents are higher than its workers, although still lag behind earnings experienced across London and those in Barnet and Hackney. Resident wages are £1,000 lower than the London average, reflecting the higher incomes of those traveling outside the borough for employment.

### Average Median Gross Annual Pay (Workplace), 2019



### Average Median Gross Annual Pay (Resident), 2019



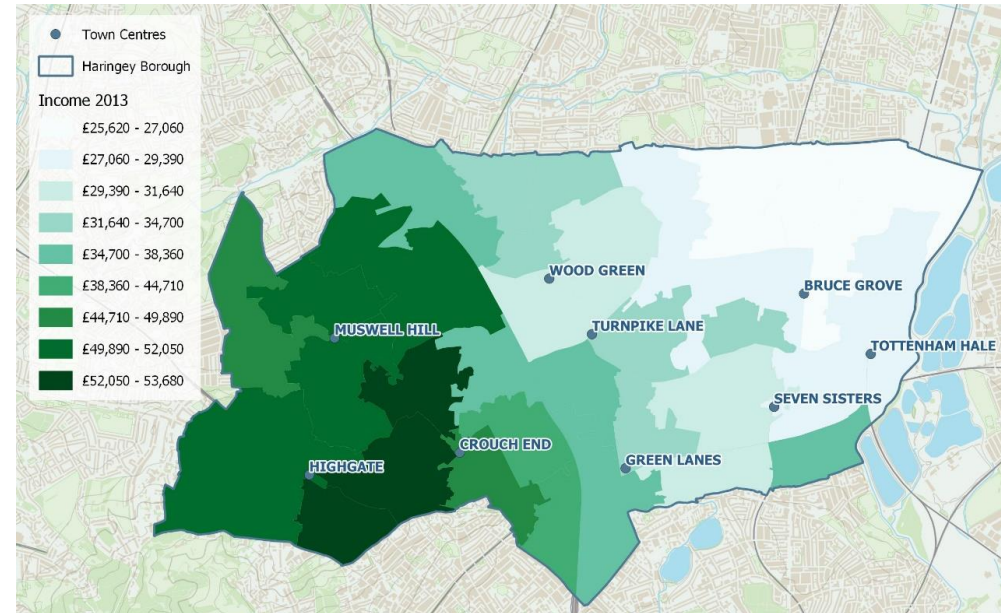
## Distinct East/West divide in resident's earnings...

Data on earnings at a more localised level is only available from the GLA through the Household Income Estimates for Small Areas data collected in 2013.

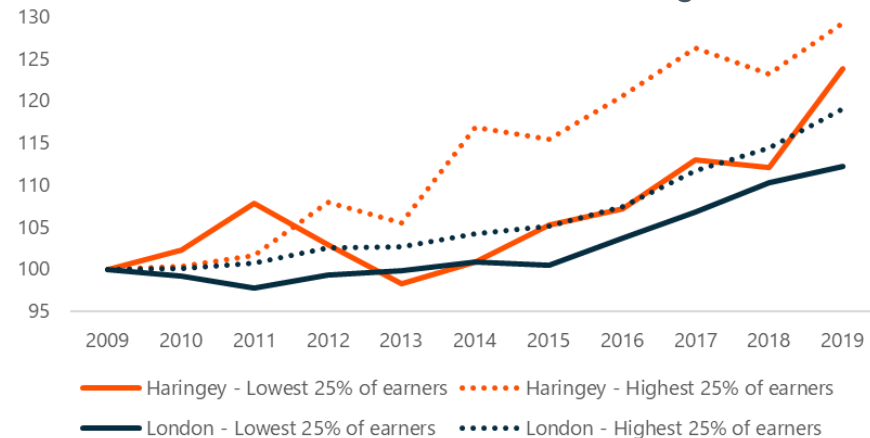
This reveals a strong East/West split in the borough's earnings. Areas to the west of the borough (including Highgate, Muswell Hill and Crouch End) having higher earnings, typically ranging from between £31,000 and £53,600. By comparison, areas to the east of the borough have lower earnings, particularly around Bruce Grove, Tottenham Hale and Seven Sisters. Typical earnings in these areas range from £25,600 to £31,000.

The gap between the highest and lowest earners has widened over the last ten years, both in Haringey and across London. Those among the highest 25% of earners now 29% more than in 2009, compared to the lowest 25% of earners, who now earn 24% more than in 2009.

Median Earnings, by area, 2013



Recent Growth in Median Resident Earnings, Indexed, 2009-19



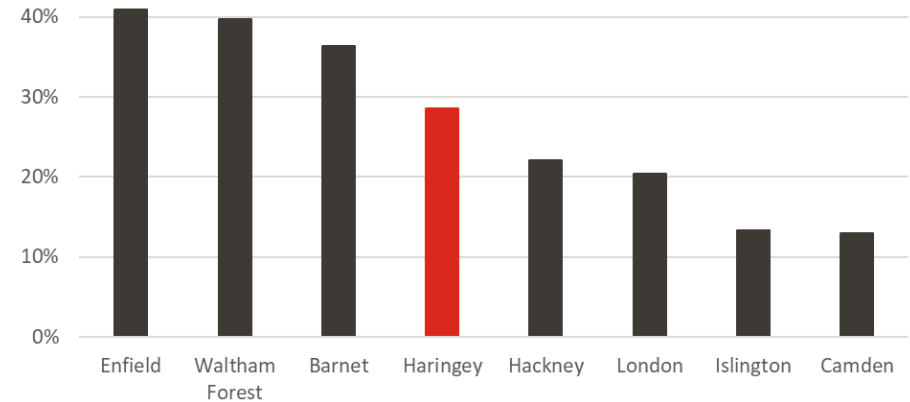
## Relatively strong uptake of businesses paying London Living Wage, but more can be done...

The London Living Wage is an hourly rate of pay, currently set at £10.55. It is calculated independently to reflect the higher cost of living in the capital, giving a worker in London and their family enough to afford the essentials and to save.

The percentage of employee jobs paid below the London Living Wage (LLW) can be used to consider the likely prevalence of in-work poverty.

In Haringey, 29% of employee jobs paid less than the LLW, which exceed the Greater London average region by 8 percentage points (pp). The percentage of employees receiving less than the LLW ranges from only 13% in Camden to over 40% in Enfield.

Percentage (%) of employee jobs paid below the London Living Wage, 2018



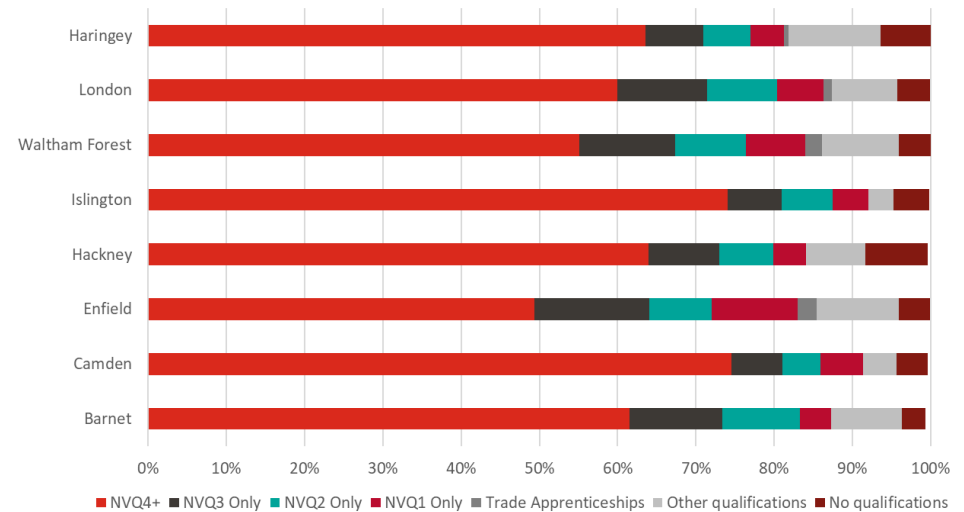
## Highly skilled workforce, but challenges engaging those with no qualifications...

Haringey has a highly skilled economy relative to national standards, with 64% of the economically active population in Haringey having an NVQ Level 4 qualification (degree-level) or higher. This proportion is higher than the London average by four percentage points.

Despite having a high proportion of residents who are qualified to degree-level or above, there is also a relatively high proportion of people who have no qualifications, or 'other qualifications' (which are generally those not formally recognised within the UK qualifications system). Combined, this accounts for 18% of all residents, much higher than the rest of London (13%).

Evidence from the Index of Multiple Deprivation suggests that it is in areas to the East of the borough where there are particularly high levels of skills deprivation.

Percentage (%) of economically active population with NVQ qualifications, 2018



Note: No trade apprenticeships data for Barnet, Camden, Hackney and Islington.

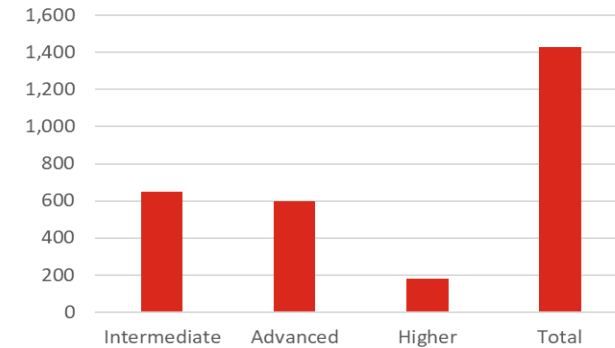
## Good uptake of apprenticeships, but higher diversity of subjects needed to support growth aspirations...

In 2016/17, there were 1,430 apprenticeship starts in Haringey, of which 650 were of an intermediate level. The take-up at advanced and higher levels is 600 and 180 respectively.

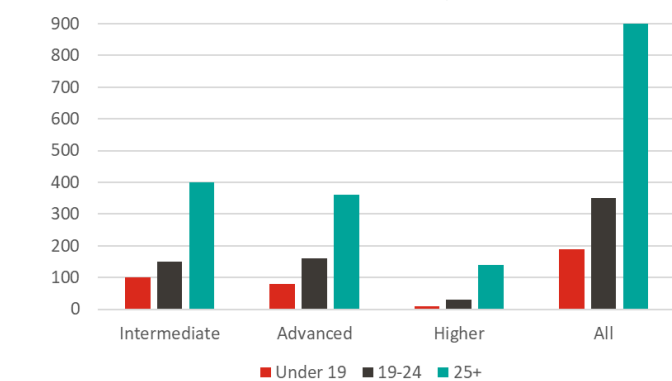
People undertake apprenticeships at a range of different ages. The most common age group is the over-25s, which account for 63% of all apprenticeship starts.

The under 19 and 19-24 age groups respectively account for 13% and 24% of all apprenticeship starts and account for a greater proportion of intermediate and advanced apprenticeships.

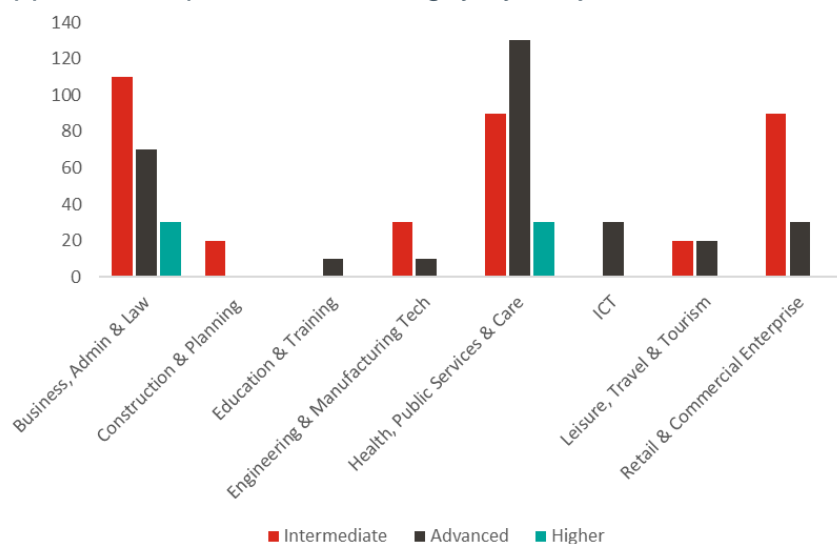
Apprenticeships starts in Haringey by level, 2017/18



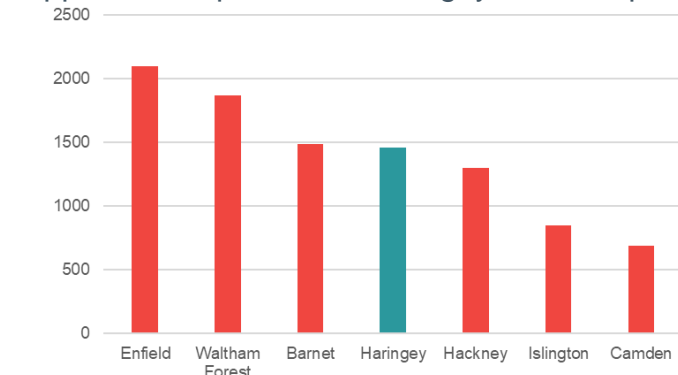
Apprenticeship starts in Haringey by level and age, 2017/18



Apprenticeships starts in Haringey by subject, 2016/7



Apprenticeship starts in Haringey and Comparators, 2016/17



## A number of Apprenticeship providers operating in the borough...

Apprenticeships were provided by 43 institutions in Haringey in 2017/18. The table lists the 13 apprenticeship providers where more than 20 starts were recorded for 2017/18

### Apprenticeship providers in Haringey, 2017/18

Provider Name	Provider Type	Starts 2016/7
College Of Haringey, Enfield And North-east London, The	General FE and Tertiary College	480
Impact Learning & Data Solutions Limited	Private Sector Public Funded	90
Eastleigh College	General FE and Tertiary College	80
London Learning Consortium Community Interest Company	Private Sector Public Funded	60
Redbridge College	General FE and Tertiary College	60
West Nottinghamshire College	General FE and Tertiary College	60
The Intraining Group Limited	Private Sector Public Funded	50
5 E Ltd.	Private Sector Public Funded	30
Learndirect Limited	Private Sector Public Funded	20
Newham College Of Further Education	General FE and Tertiary College	20
Prevista Ltd	Private Sector Public Funded	20
Qube Qualifications And Development Limited	Private Sector Public Funded	20
Veolia Environnement Development Centre Limited	Private Sector Public Funded	20

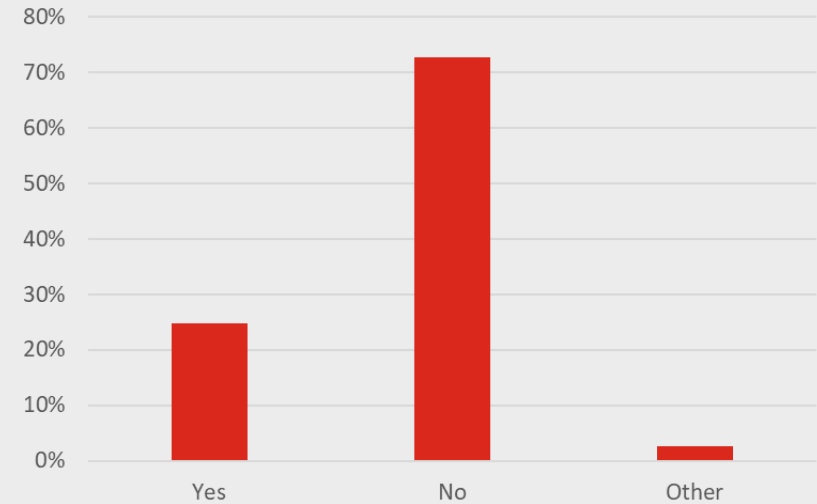
## Limited number of businesses report skills gaps...

Through the primary research undertaken, businesses were asked for their perspectives on the current labour market available in Haringey and whether it meets their needs.

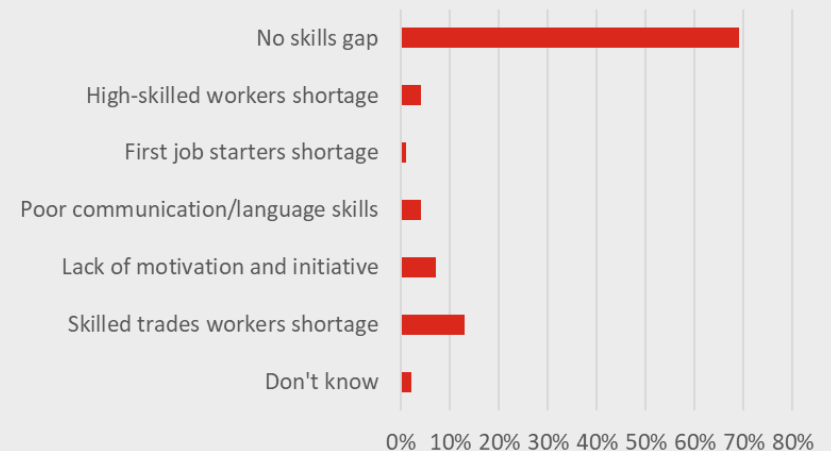
Of the respondents, the majority of businesses reported they did not face any recruitment challenges over the last 12 months (73% of businesses). Recruitment challenges were experienced by only 25% of those businesses who responded to the survey. A slightly higher proportion of businesses employing more than 10 employees reported challenges in recruiting people over the last 12 months (27%), although this is not significantly above what was reported by businesses employing less than 10 employees.

When asked about skills shortages and/or skills gaps, a large proportion of respondents reported that they don't experience any skills shortages or gaps (69% businesses). Of those who did (29% of businesses), 13% are concerned about the lack of (skilled) trades workers, 4% are concerned about a lack of motivation and initiative amongst workers, 4% cite poor communication/language skills and 4% report a shortage of high-skilled workers.

Have you faced challenges in recruiting people in the last 12 months?



What have been the biggest skills shortages/skills gaps in you workforce?



# 3. Business



## Introduction & Overview

### Introduction

This section provides an overview of the current business landscape within Haringey, establishing a profile of the borough's business base, the types of activities these businesses undertake, identifying the key sector strengths locally and some of the future sector opportunities and trends facing the borough.

The performance of local businesses is important in understanding the opportunities that are being created for Haringey's residents, whether these are good jobs, if businesses are contributing towards a healthy environment and support fairness within local communities.

### Overview

Haringey has a thriving pool of businesses, with 14,210 active enterprises recorded. Over 2,150 new businesses started in 2018, at a rate of 7.9 new business for every 1,000 residents. This business start-up rate lags behind London and comparator boroughs, with business growth of 16% over the last four years – being below the London rate of growth. When businesses start, they have a relatively good chance of survival, with 90% of businesses starting in 2017 surviving their first year of operation.

Haringey's sector profile has a strong local service offering, reflecting the borough's role as a suburb within London. The most prominent sectors in Haringey are public services, retail, arts & entertainment and accommodation & food. Haringey has a number of emerging sectors which are growing strongly, including the creative, digital and professional service sectors.

## Snapshot

- + *There are **14,210 active enterprises** in Haringey. The number of businesses has grown by 16% over the last four years, behind the rate of growth experienced across London.*
- + ***2,150 new businesses** were started in Haringey in 2018, resulting in a net increase of 200 businesses across the borough.*
- + *Haringey has a **strong local service offering**, with sector specialisms in public services, retail and arts & recreation.*
- + *There are **emerging clusters of activity** within the creative, digital and professional service sectors.*

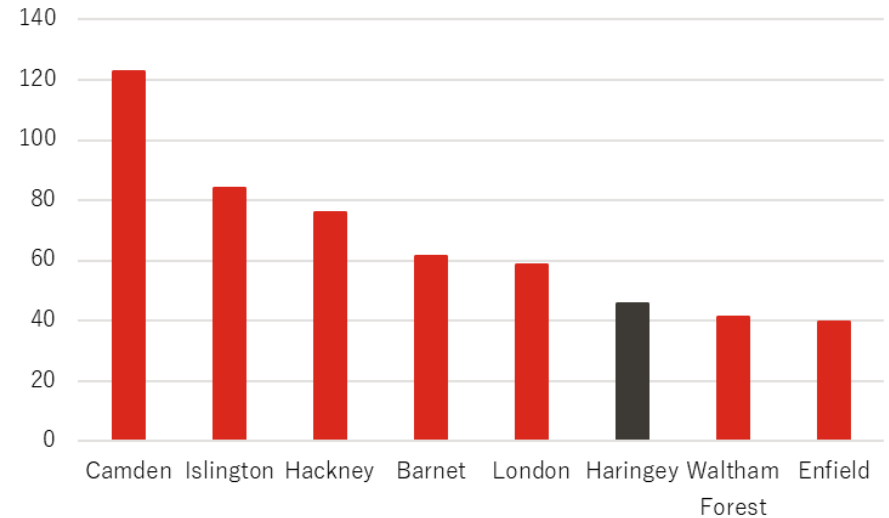
## Growing number of businesses, but below growth rates experienced elsewhere...

There are a number of different data sources which provide intelligence on the number of businesses within Haringey:

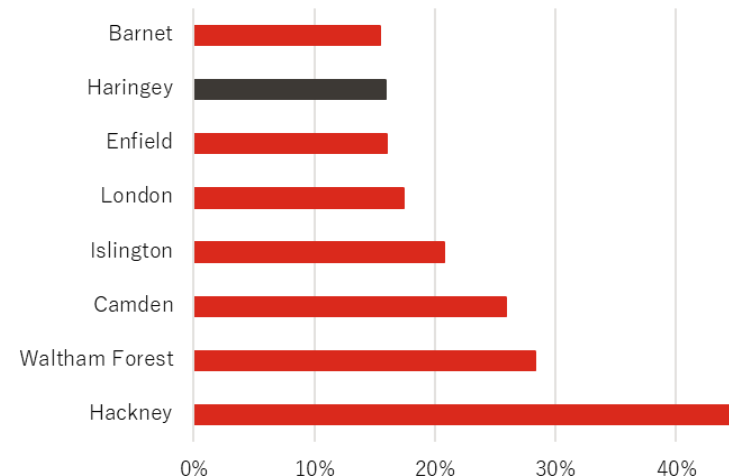
- + *ONS Business Demography* identifies **14,210** active enterprises in Haringey, measuring the total number of businesses registered for VAT and PAYE which have been active at any point during 2018. This provides the best measure to identify the total number of businesses in the borough.
- + *ONS Business Count* identifies **12,340** businesses in Haringey, based on data from the Inter Departmental Business Register (IDBR) at a certain point in the year (March 2019). This is the best indicator to understand the sectors and sizes of businesses.
- + *Companies House* data identifies **21,200** in Haringey based on the number of companies registered in the borough. This is the best measure to identify the geographical location of businesses in the borough.

Although the number of businesses in Haringey has grown in recent years, it has grown at a slower rate relative to comparator boroughs. There was a 16% increase in the number of businesses in Haringey between 2015 and 2019, comparable to the rate seen in Barnet, but below growth experienced in Camden, Waltham Forest and Hackney.

UK Business Count for Haringey and Neighbouring LAs, 2019 by 1,000 residents



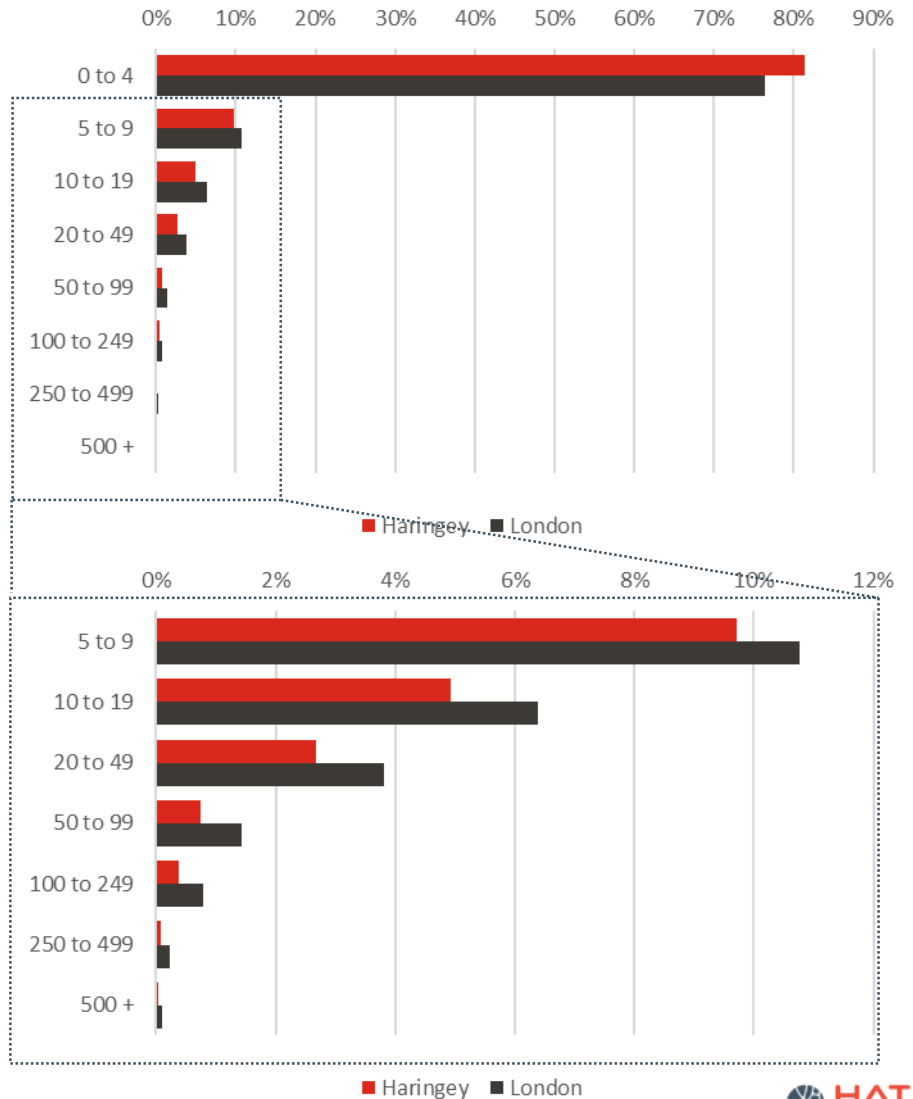
Business Count Growth 2015-2019



## Fall in the number of larger businesses in the borough...

Haringey's business base is dominated by SMEs, with the number of businesses employing less than 250 employees accounting for 99% of all businesses in the borough. Haringey has a small number of larger businesses in the borough, with only 9% of businesses having more than 10 employees compared to 13% across London.

Business Demography, Births, Deaths and Net, 2018



Change in Number of Businesses (by size), 2014-19



## Growth in the number of businesses, but low levels of entrepreneurialism...

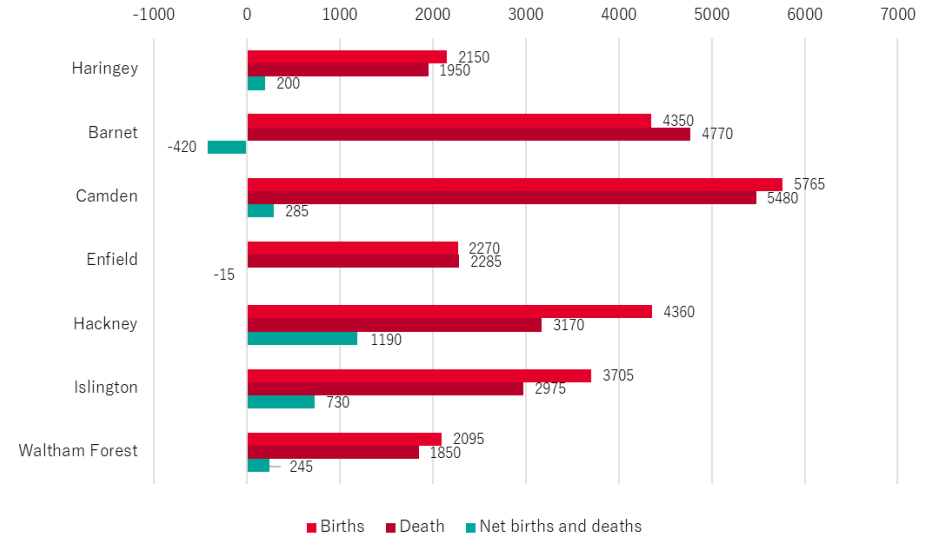
The development of new businesses within Haringey is important for sustaining the area's economic vitality and supporting the growth of the economy. A range of data sources are presented below, to best capture the enterprise performance of local businesses.

In 2018, 2,150 new businesses were created across Haringey and 1,950 businesses stopped trading. This resulted in a net surplus of 200 businesses across the year.

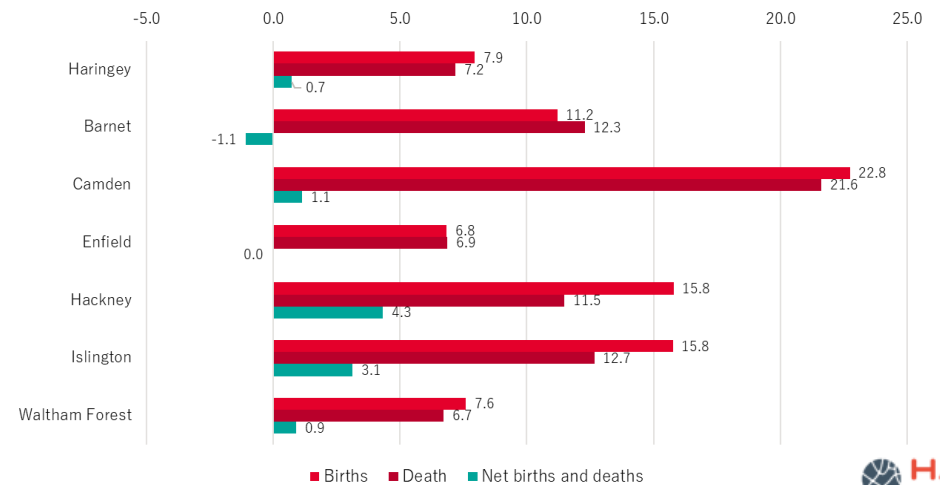
Relative to comparator areas, Haringey has one of the lowest levels of business creation, being the second lowest behind Waltham Forest.

When compared to the number of residents in the borough (to show levels of entrepreneurialism), Haringey had 7.9 new businesses started for every 1,000 residents. This start-up rate ranks below that experienced in many of the comparator boroughs, including Barney, Hackney and Islington.

Business Demography, Births, Deaths and Net, 2018



Business Demography, Births, Deaths and Net, per 1,000 resident, 2018

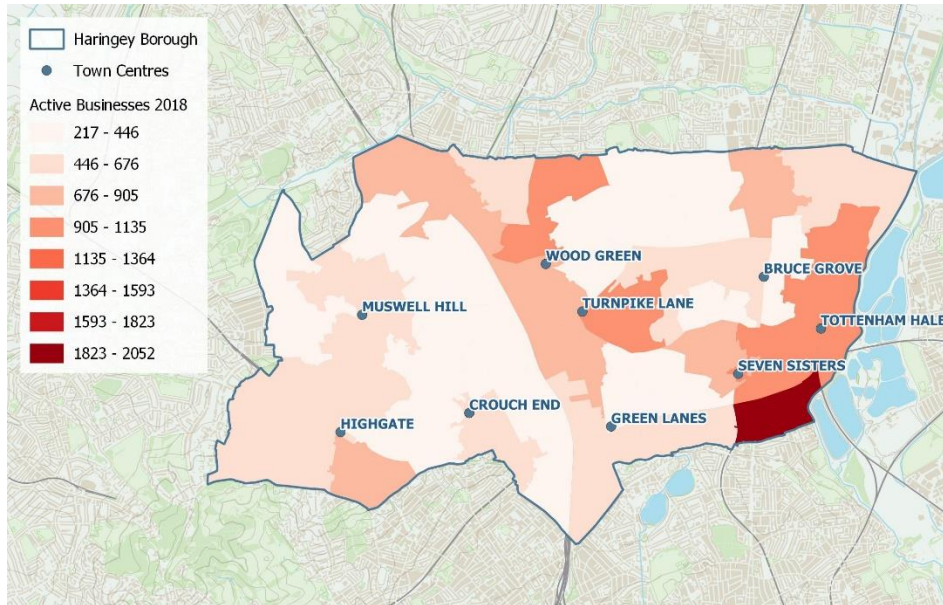


## Concentrations of Businesses & Start-Ups in the borough...

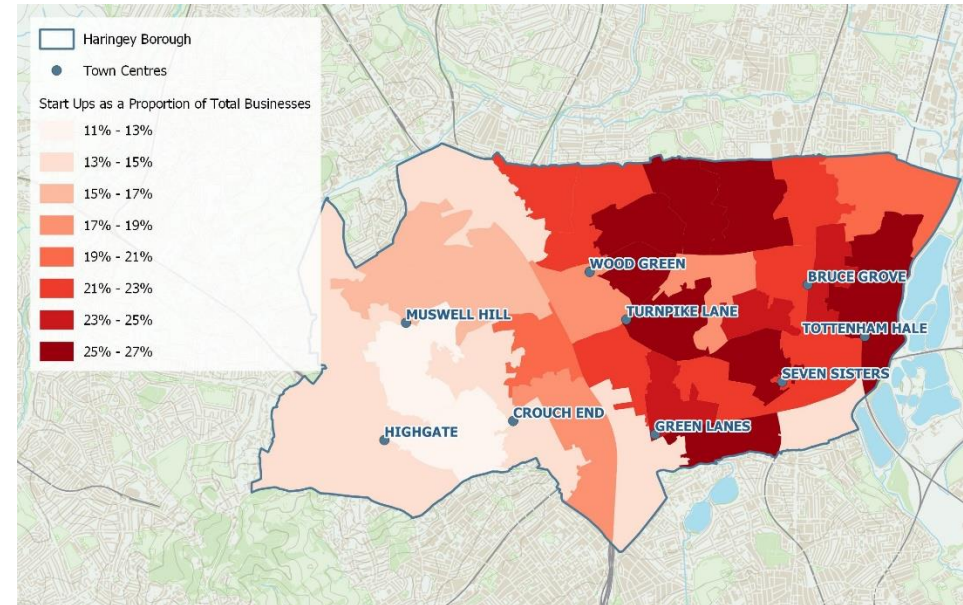
Businesses are well spread across Haringey, although there are concentrations towards the East of the borough, particularly around the Seven Sisters and Tottenham Hale area. This reflects the presence of many industrial estates in this area, particularly smaller workspace units, creating a higher density of employment.

Areas which currently have a high level of business start-ups relative to the existing business base (an indicator of rapidly developing areas) are predominately to the East of the borough, including Wood Green, Turnpike Lane, Green Lanes and Tottenham Hale. The business start-up rate (as a proportion of the existing business base) appears to be much lower to the West of the borough, reflecting the existing wealth within these areas and the residential nature.

### Spatial Distribution of Businesses in Haringey



### Number of Businesses Started in 2018 as a proportion of the overall Business Base



## Strong levels of Business Survival Rates...

The ONS Business Demography dataset provides additional data on the survival rate of new businesses created across different areas. This is helpful in understanding the current business environment and how easily businesses are able to establish themselves. Data on the survival rates of new active businesses in Haringey shows that:

- + Of Haringey's 2,150 businesses who started trading in 2017, 90% of them survived the first year of trading. This rate is above the London-wide survival rate.
- + In general, Haringey has had a higher business survival rate relative to London, with the proportion surviving more than five-years being slightly higher than the London level.
- + Business survival rates for Haringey's businesses have declined in recent years, with the one-year survival rate falling from 94% for businesses started in 2013, to 90% for those businesses started in 2017. A similar trend has occurred with the two-year and three-year survival rate. This largely reflects trends across London.

Business Survival Rates, For Businesses Created in 2013

	Survival Rates				
	1-year	2-year	3-year	4-year	5-year
<b>Haringey</b>	<b>94%</b>	<b>74%</b>	<b>60%</b>	<b>50%</b>	<b>40%</b>
Barnet	92%	74%	58%	49%	41%
Camden	90%	74%	59%	50%	41%
Enfield	94%	74%	58%	47%	38%
Hackney	94%	77%	62%	52%	43%
Islington	92%	73%	57%	47%	39%
Waltham Forest	93%	71%	58%	47%	38%
London	92%	73%	58%	48%	39%

Business Demography, Births, Deaths and Net, per 1,000 residents, 2017

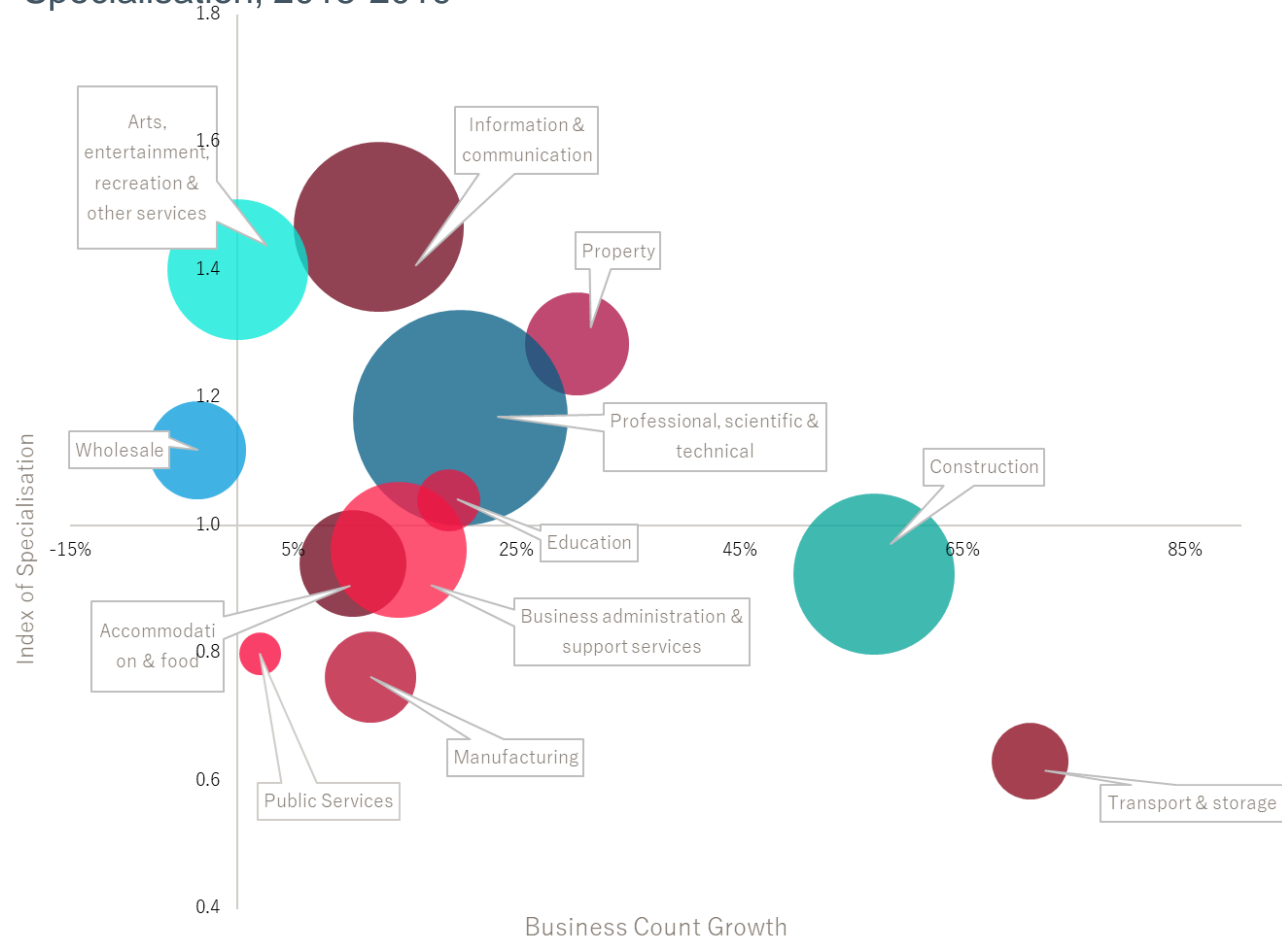
	Year of registration	No. of registrations	1-year	2-year	3-year	4-year	5-year
<b>Haringey</b>	2013	2,110	94%	74%	60%	50%	40%
	2014	2,190	94%	76%	61%	48%	-
	2015	2,350	92%	74%	57%	-	-
	2016	2,415	92%	71%	-	-	-
	2017	2,150	90%	-	-	-	-
<b>London</b>	2013	83,600	92%	73%	58%	48%	39%
	2014	88,580	91%	74%	59%	46%	-
	2015	100,920	87%	68%	52%	-	-
	2016	102,135	90%	69%	-	-	-
	2017	92,300	87%	-	-	-	-

## A highly diverse mix of sectors, which some specialisms in the economy...

Haringey has a range of sector specialisms within the borough. This graph provides an overview of the sector profile of businesses in Haringey. Highlights from this graph includes:

- + The fastest growing sector is transport and storage which grew by 71% between 2015 and 2019. This is considerably greater than the average business growth rate of 16%. Other sectors growing strongly includes construction, property and professional services.
- + The largest sector in Haringey is the professional, scientific and technical sector with 2,580 enterprises located in Haringey. This represents 21% of all businesses.
- + Haringey's most specialised sector is information and communication, closely followed by arts, entertainment, recreation & other services. Conversely, Haringey is underrepresented in finance & insurance, manufacturing, and business administration.

Haringey Business Count, by broad sector, growth rate and Index of Specialisation, 2015-2019



Note: The *horizontal* axis illustrates change in the business count between 2015 and 2019. The public administration and defence sector is not represented in this graph because it has a null business count growth and location quotient.

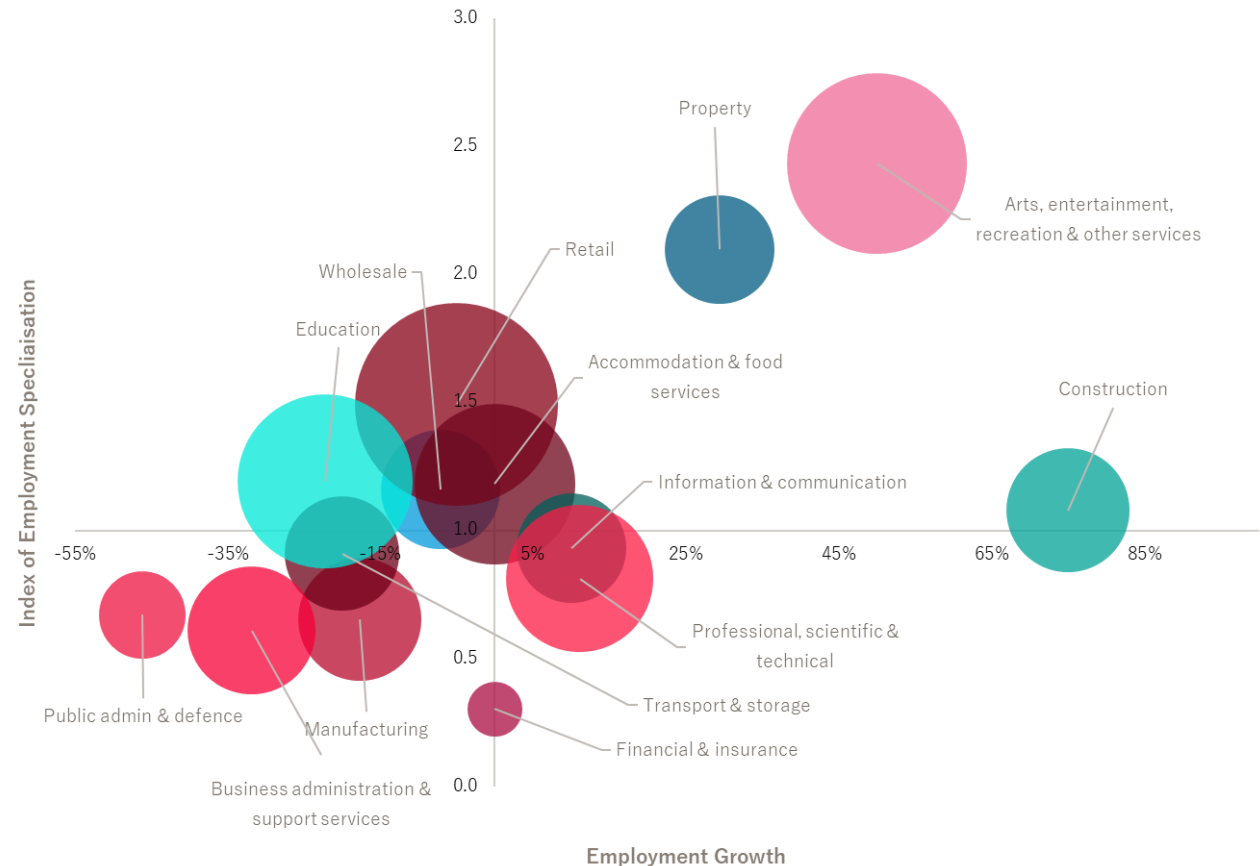
The *vertical* axis provides an indication of Haringey's relative business sector specialisms, relative to national business counts. Any sector above the horizontal axis (with a location quotient above 1.0) can be deemed to be a business sector in which Haringey has a level of business specialism.

The size of each sector in 2019 is represented by the *size of each bubble*

## A highly diverse mix of sectors, which some specialisms in the economy...

When looking at employment, Haringey has a number of specialisms particularly in arts, entertainment and recreation, property, retail and education. The arts, entertainment and recreation sector is one of the largest employing sectors in the borough and one that has undergone substantial growth since 2015. Haringey has not seen employment growth in many of its sectors (with the exceptions of arts & entertainment, construction and property.) Only construction has seen high growth in employment and business counts in the borough since 2015.

Haringey Employment, by broad sector, growth rate and Index of Specialisation, 2015-2018



Note: The *horizontal* axis illustrates change in the employment between 2015 and 2018.

The *vertical* axis provides an indication of Haringey's relative employment specialisms, relative to national employment. Any sector above the horizontal axis (with a location quotient above 1.0) can be deemed to be a sector in which Haringey has a level of employment specialism

The employment count in each sector in 2018 is represented by the *size of each bubble*

## Five prominent sectors are present within Haringey's economy...

Based on the number of people employed in the borough, the five largest sectors have been analysed in more detail to understand their recent performance, sub-sector strengths and trends within each sector (shown overleaf):

- + By far the largest is public services (including public administration, health and education) which highlights the important role of employment which 'services' the local population.
- + The next largest sectors are retail, arts and recreation and accommodation and food services. These sectors provide an important and diverse range of employment opportunities for local residents and those commuting into the borough. However, they are typically lower value and lower paid opportunities.
- + Professional services, in which employment opportunities tend to be better paid, is the fourth largest in terms of employment. Given that this was the largest single sector based on the business count, this suggests that many of the businesses located in Haringey are small in size.
- + Business support services, an important source of employment in many London boroughs, does not fall within the top five sectors.

Top 5 Sector Strengths	Employ. in Haringey	Businesses in Haringey	Employ Growth 2013-18		Sub-sector strengths
			Change (no.)	Change %	
Public Services	16,250	650	-429	-3%	Child day-care activities, Pre-primary education, Public order and safety activities, Social work, Secondary education, Primary education
Retail	9,500	1050	0	0%	Food retail, retail of sporting equipment, retail of clothing
Arts & Entertainment	7,500	1100	2,500	50%	Library activities, Gambling and betting activities, Operation of sports facilities
Accommodation & Food Services	6,000	640	500	9%	Licensed restaurants, Unlicensed restaurants and cafes, Take away food shops, Event catering activities, Accommodation
Professional services	5,000	2585	750	18%	Specialised design activities, Solicitors, Management consultancy activities, Accounting, and auditing activities

Source: BRES, ONS, 2013-2018; UK Business Counts, 2019

Note: Public Services includes: public administration, education and health sectors; BRES data 2013 -2014 has been rescaled to include PAYE; Sub-sector strengths are where a employment in a 5 digit sic defined sector has a high location quotient and employment greater than 250.

## There are a number of trends impacting on these prominent sectors...

Sector	Sector Trends
<b>Public Services</b>	Employment in this sector has declined since 2013, by approximately 3%. Examining annual population survey data* in this sector, job losses were concentrated in caring, leisure and other service occupations, which saw a loss of 25% of employment and professional occupations which saw an 8% reduction in employment. While associated professional and tech occupations and administrative and secretarial occupations saw substantial increases of 88% and 81% respectively. Looking at UK business counts, this sector has seen a decline of 10% of businesses since 2015. This is roughly accurate for all sizes of businesses in this sector, except for medium sized (50 to 249 workers) business which have seen a 20% increase in businesses since 2015.
<b>Retail</b>	The retail business count in Haringey has risen by 9% since 2015. There have been no large businesses counted in this sector and only 5 medium businesses the latter of which has remained constant between 2013-2019. There has been a 23% increase in the count of small businesses (10-49 workers) in this sector, which equates to an additional 25 small businesses emerging since 2015.
<b>Arts &amp; Entertainment</b>	The arts & entertainment sector business counts have remained static since 2015, this is true for all sizes of business. However, there has been a 50% increase in employment in this sector.
<b>Accommodation &amp; Food Services</b>	Employment in this sector has remained constant since 2013. However, there have been changes in employment structure in the accommodation and food service sector**. Between 2013-2019 there has been a large increase in the proportion of accommodation & food services employment concentrated in elementary occupations, a rise of 53% (which equates to an increases in employment in this occupation of 2,500). Whereas substantial reductions in employment have taken place in associate prof & tech occupations of -28%.
<b>Professional services</b>	There has been a steady increase in the number of people employed in the professional services sector, a rise of 18% between 2013-2018. This rise in employment is also reflected in a trend seeing a rise in the professional service businesses, by 20% between 2015-2019. This is exclusively due to an increase in small and micro professional services businesses.

Source: UK Business Counts, ONS, 2014-2019; UK Business Counts, ONS, 2014-2019; Hatch Regeneris, 2017

Note: Public admin education & health (SIC 2007) proxy used for APS data for Public services.

## Haringey has a range of ‘traditional’ sectors within its economy...

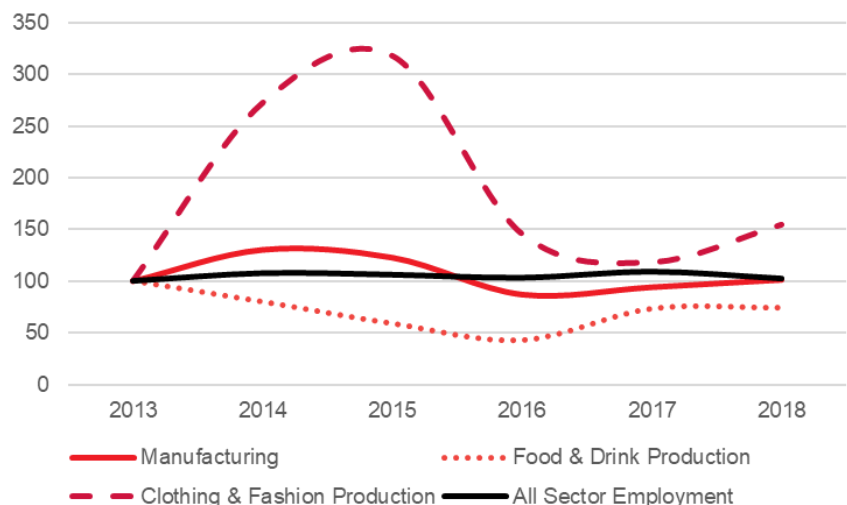
Haringey has a range of more ‘traditional’ sectors which have previously been at the core of its economy. This includes activities relating to *manufacturing, food and drink production, and clothing and fashion production*. Key trends within these sectors includes:

- + Only manufacturing has seen static growth in line with the average across all sectors in the borough between 2013 and 2018. The other two traditional sectors have seen quite drastic changes over this period.
- + Food & drink production has seen a decline in employment by 26%, whereas clothing and fashion has increased by 55% (albeit experiencing significant swings in employment – with employment increasing and then decreasing significantly between 2013 and 2016).
- + The majority of decline in employment in the food & drink sector was between 2013 and 2016, with some slight recovery taking place in the most recent period.
- + The recent gains in employment in the clothing and fashion production sector are also distributed across the same 5 year period.

Index Chart Showing Change in Employment in Haringey’s Traditional Sectors and All sectors, 2013-2018

Sector	Change 2013 - 2018	
	Emp Change (no.)	Emp Change (%)
Manufacturing	47	1%
Food & Drink Production	-290	-26%
Clothing & Fashion Production	300	55%
All Sectors	1,587	2%

Index Chart Showing Change in Employment in Haringey’s Traditional Sectors and All sectors, 2013-2018



Source: BRES, ONS, 2013-2018

Note: Food & Drink production = Manufacture of food products + Manufacture of beverages; Clothing & fashion production = Manufacture of wearing apparel

## There are a number of trends impacting on Haringey’s ‘traditional’ sectors...

Sector Strength	Trends Impacting on the Sector	Typical Jobs and Skills Requirements
<p><b>Food &amp; Drink Production</b></p>	<p>Employment in this sector has fallen quite rapidly between 2013-2018 with a total decline of employment of 375. Despite this fall in employment there has been an increase in the number of food &amp; drink businesses in Haringey rising from 65 in 2015 to 80 in 2019, with 75% of these businesses being micro firms.</p>	<p>The national skills academy <i>Food &amp; Drink</i> outlines several areas of skill required in this sector, such as: food &amp; drink process operator, baker, food &amp; drink maintenance engineer. New methods of production in this sector are harnessing advanced robotics and automation for many jobs that were once done by labour.</p>
<p><b>Manufacturing</b></p>	<p>Employment in this sector has been static since 2013, increasing by just 1%, employment had been declining and has only returned to slightly above its 2013 rate in 2018. There has a steady rise in manufacturing businesses since 2015, of 12%. This is the result of an additional 55 micro businesses emerging in this period, while the count of small businesses fell by 7% in the same period and medium and large businesses saw no change.</p>	<p>Looking at census data, manufacturing in Haringey is a sector with a wide variety of skills – with concentration at both ends of the scale. There is a large proportion having no qualifications and a similarly large proportion holding level 4+ qualification.</p>
<p><b>Clothing &amp; Fashion Production</b></p>	<p>This sector has grown in terms of employment since 2013 by 55% (an employment increase of 300). This is despite a trend towards less clothing &amp; fashion production companies between 2015-2019 which saw overall business counts drop by 5%, with a decline of 20% of small companies.</p>	<p>Outlined in the UK Fashion and Textiles Association, UKFT, typical jobs in this sector include: fashion designer. garment maker, textile manufacturing operative. Dry cleaning and laundry. Skills also outlined by the UKFT include: pattern cutting, fashion design, tailoring etc.</p>

Source: BRES, ONS, 2018; Census, 2011

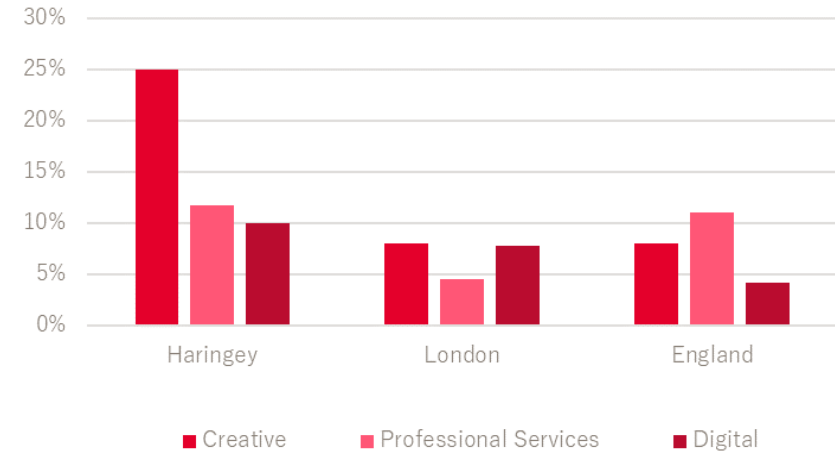
Note: Food & Drink production = Manufacture of food products + Manufacture of beverages; Clothing & fashion production = Manufacture of wearing apparel

## Haringey also has a number of emerging sectors, which will play an important role in its future...

Haringey has a number of emerging sectors, which are helping support the development of the borough's economy. Many of these reflect wider growth experienced across London, including some trends specific to Haringey (e.g. the movement of creative industries away from Central London towards more affordable locations). Sectors that have been analysed includes the *creative sector*, *professional services* and the *digital sector*.

- + Employment in the creative, professional services and the digital sectors grew at a faster rate in Haringey than on London or in England.
- + Growth in employment has not always corresponded with patterns of growth in the number of businesses. The number of creative and digital businesses has not grown as strongly as experienced in London or England, however there has been strong growth in the professional services sector.

Employment Growth in Emerging Sectors 2015-2018 % Change



Business Count Growth 2015-2019 % Change



There are a number of trends impacting on these emerging sectors...

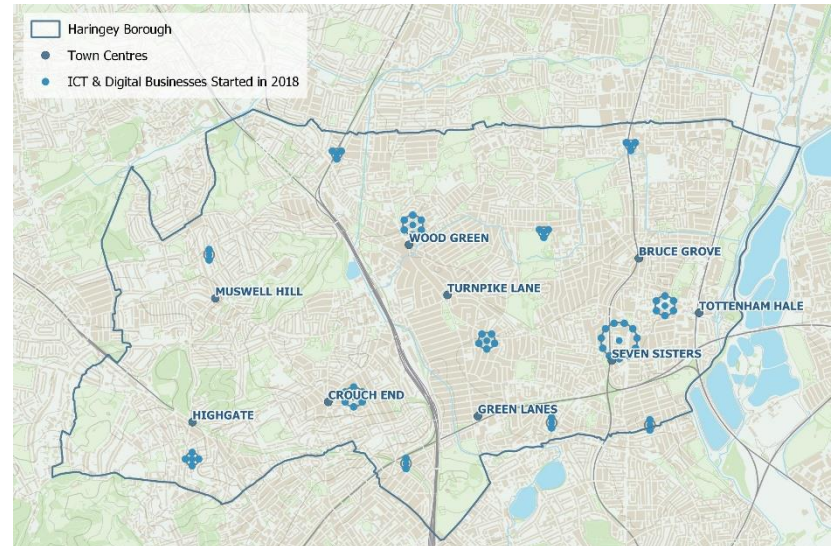
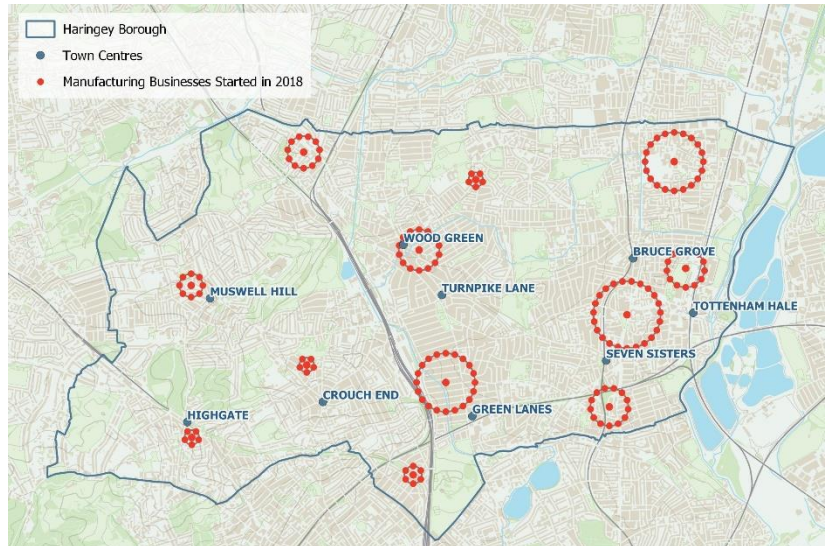
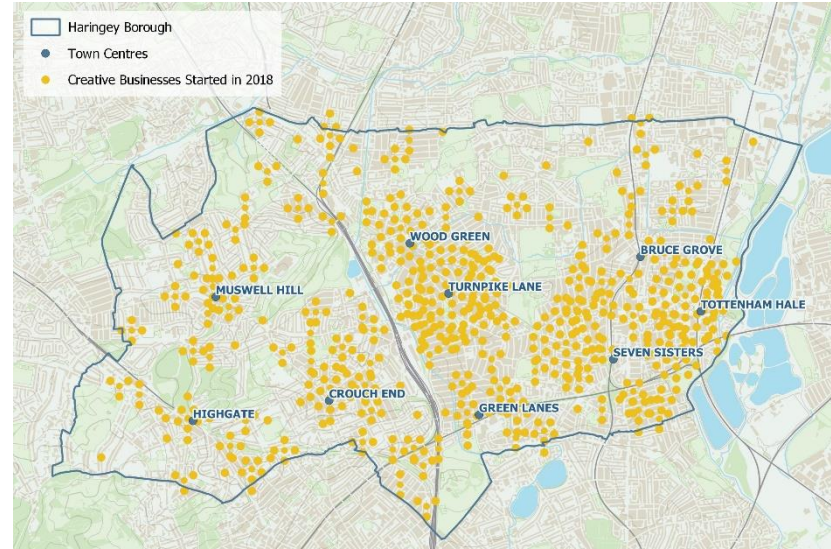
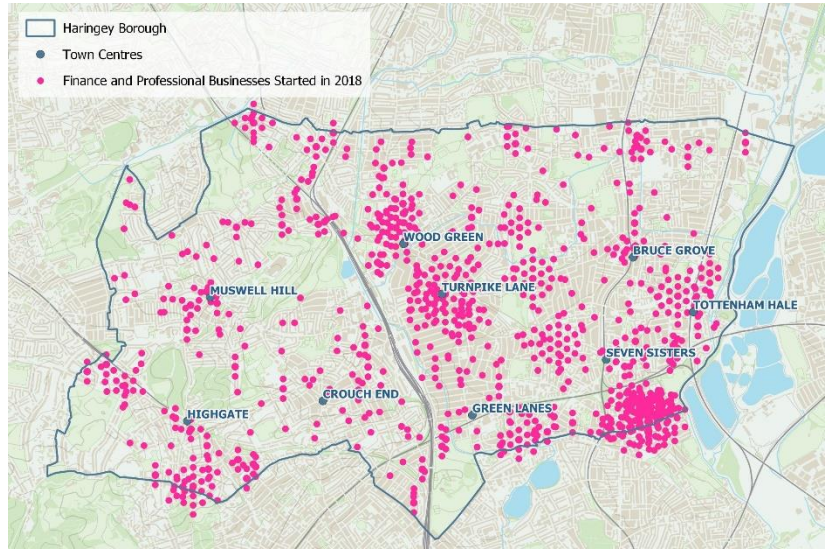
Sector Strength	Trends Impacting on the Sector	Number of Jobs 2018	Number of Businesses 2019	Average Number of People in Each Business
<b>Professional Services</b>	There is an aspiration to grow this sector, outlined in both the Mayor's Economic Development Strategy and the London LEP 2036 Vision Document. The reason behind current and future expected growth is likely a result of business agglomeration and high concentration of high skills.	5,000	2,580	2
<b>Creative Sector</b>	Trends in the creative sector are likely to differ quite broadly depending on which aspect of the sector is examined. For example creative manufacturing is likely to see advantages through harnessing new technology such as 3D printing and online marketplaces giving rise to more micro businesses as access to online markets and efficient production methods reduce traditional barriers to entry. Moreover, the growing availability of co-working and flexible workspace will likely encourage micro firms in the creative sector to emerge and develop by reducing start-up risks.	5,000	2,755	2
<b>Digital Sector</b>	The digital sector currently underpins most other sectors in the Haringey economy this is likely to continue as developments in production (for example 3D printing) become more widely available and more efficient. A potential trend for this sector may be increased international competition, due to the intangibility and ease of distribution of many of this sector's goods and services.	2,750	1,650	2

Source: BRES, ONS, 2018; UK Business Count, 2019 Census, 2011

Note: Food & Drink production = Manufacture of food products + Manufacture of beverages; Clothing & fashion production = Manufacture of wearing apparel

## These emerging sectors are clustering around certain areas of Haringey...

Location of new businesses started in Haringey's emerging sectors in 2018



Source: Companies House, 2019; Note: Concentric circles have been added where there is more than one business located at a particular postcode to show clustering around particular areas.

# Current Business Landscape in Haringey

## The Creative Sector

The growing creative sector in Haringey, particularly to the East of the borough, is able to play a key role in regeneration, community resilience and economic sustainability, particularly in some neighbourhoods (e.g. Tottenham) which have typically struggled to attract higher-value uses.

Defining the creative industries is challenging given the complexity and cross-cutting nature of the sector. This study uses the definition developed through the Tottenham Creative Industries work, using a 'DCMS+' definition to capture the major of creative activities in the borough. This includes those industries defined by DCMS as being in the creative industries, in addition to a few additional industries in Haringey which aren't traditionally considered to be creative, but whose activity in the borough is predominately of a creative nature (e.g. brewing).

This finds there are 5,000 jobs within the creative industries in Haringey across 2,755. There are particular concentrations of activity around the Tottenham and Wood Green areas, reinforced through further research which has been undertaken on each area (namely the Tottenham Creative Industries and Wood Green Employment Land and Workplace Study).



**25%** employment growth in the last four years



**13%** business growth in the last four years



Business activity is **concentrated in areas of regeneration** – offering opportunities for local people



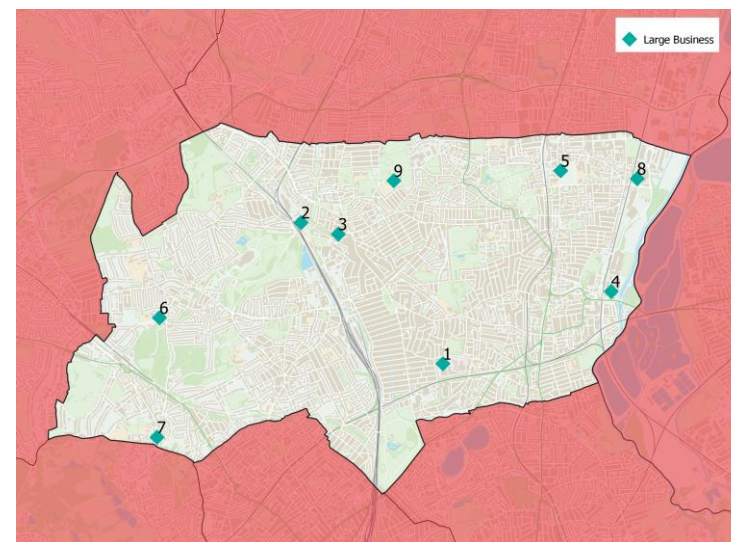
**Availability, affordability and security** of space critical to supporting the sector's growth

## Haringey's Largest Businesses

Haringey has a range of different business sizes across the borough. The vast majority of businesses are SMEs, employing few than 250 people (accounting for 99% of businesses in the borough). 91% of businesses in Haringey are micro in size, employing between 0 and 9 employees. This is a higher proportion than experienced across London (87% of businesses).

Haringey does have a number of larger businesses, with 15 businesses employing more than 250 employees in the borough. Data on the number of people employed by businesses is confidential, however an insight can be gained through the UK Gender Pay Gap statistics, through which the largest businesses must release information about employment. Although it doesn't capture all businesses in the borough, it reveals that the largest businesses in the borough are primarily public sector organisations.

Map of Haringey's Large Businesses



Map No.	Business	Sector	Employ.
1	Barnet Enfield & Haringey Mental Health NHS Trust	Human health activities	1000 to 4999
2	Haringey Council	Public administration and defence	1000 to 4999
3	Homes for Haringey	Real Estate	500 to 999
4	Outward Housing	Real estate, Residential care, social work	500 to 999
5	Tottenham Hotspur Football & Athletic Co. Ltd	Sports Activities	500 to 999
6	Ambitious About Autism	Education	250 to 499
7	Highgate School	Education	250 to 499
8	MBA Group	Printing, Information services	250 to 499
9	Woodside High School	Education	Less than 250

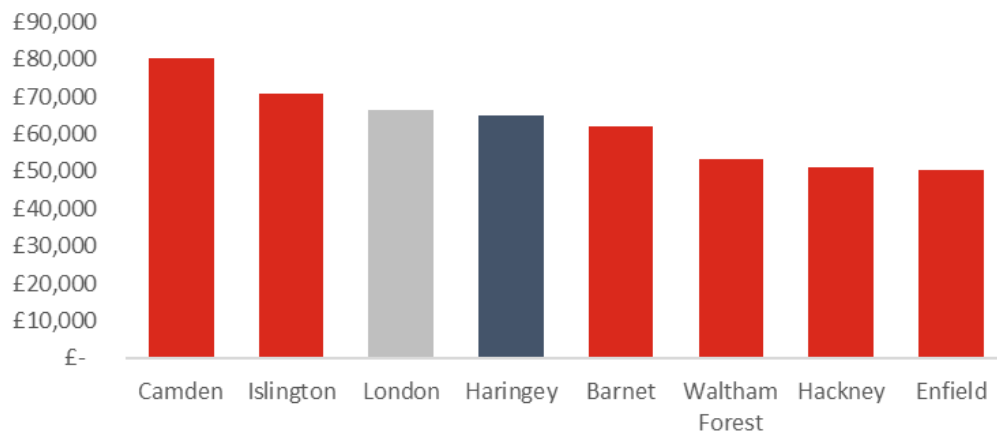
## Productivity

Haringey is a relatively small economy (contributing to 1% of London's Gross Value Added (GVA)), placing it as the 24<sup>th</sup> largest economy out of 32 boroughs.

In 2017, the total value of all goods and services produced by the Haringey economy (GVA) was £5,894 million. Haringey's businesses were highly productive, having the third highest GVA per worker (£64,800) after Camden and Islington. This partly reflects some of Haringey's sectors having relatively high productivity, including the construction, finance & insurance and arts (creative) sectors.

Productivity per worker is higher in London in only three sectors: manufacturing; distribution, transport, accommodation & food; and professional & administrative services.

Average GVA per worker in Haringey and comparators, 2016



Average GVA per worker by sector in Haringey and comparators, 2016

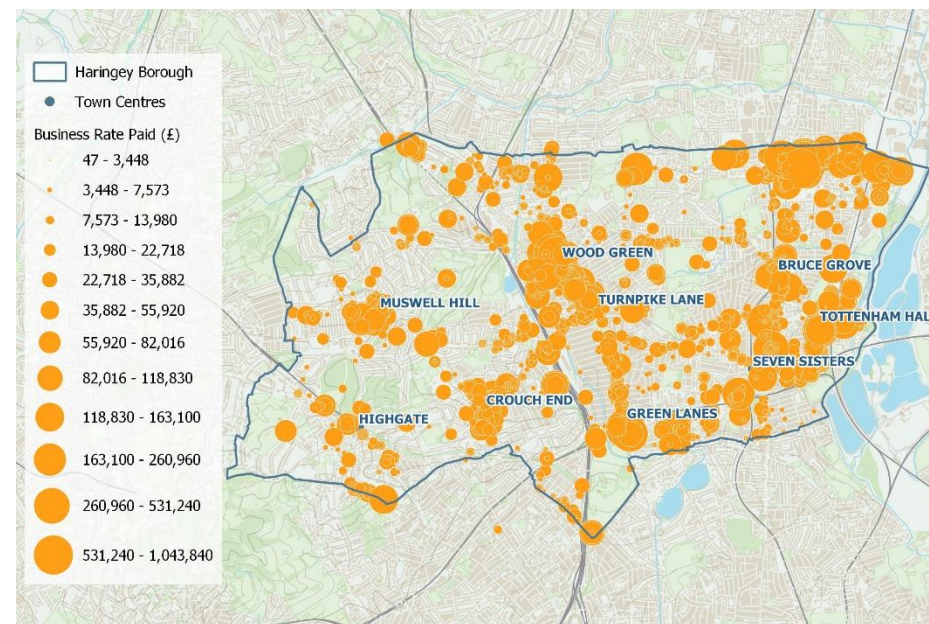
Industry	Haringey	London
Manufacturing	£50,700	£77,700
Construction	£139,700	£111,500
Distribution, transport, accommodation & food	£50,900	£51,000
Information & communication	£112,000	£107,000
Financial & insurance activities	£220,000	£148,400
Professional & administrative services	£53,800	£55,200
Public administration, education & health	£54,900	£48,100
Arts, Recreation & other services	£82,200	£70,200
All Sectors	£86,700	£80,000

Source: Regional Gross Value Added (Balanced) by Local Authority in the UK, ONS, 2017; Note: Average GVA per worker is estimated by dividing total GVA by BRES employment.

## Business Rates

Business rates provide an indication of economic activity within the borough. In terms of the spatial distribution, Haringey has clusters of activity to the east of the borough (around its industrial estates) and also around Wood Green.

Data from VOA also provides an indication as to the spread of business rates and the types of businesses paying them. Retail, offices, light industrial and storage & distribution are the main sources of business rates in the borough.

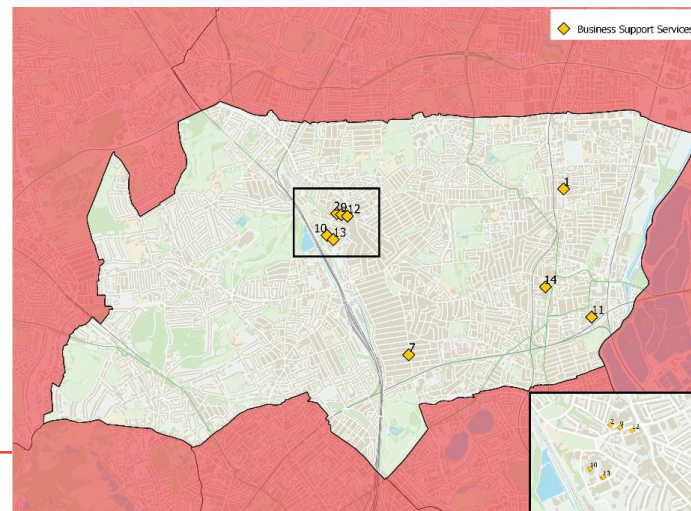


### Business Rates Profile of Haringey's Economy

Use Class	Description	Sum of Business Rates Paid	Number of Premises in Haringey	Average Business Rates paid per business	Average Business Rates per m2
A1	Shops	£41,059,780	3,173	£12,940	£97
A2	Professional & Financial Services (e.g. banks)	£1,132,680	58	£19,530	£109
A3	Restaurants & Cafes	£2,376,890	183	£12,990	£104
A4	Drinking Establishments	£212,120	28	£7,580	£24
B1a	Offices	£8,401,680	1,216	£6,910	£56
B1c	Light Industrial	£4,959,940	659	£7,530	£35
B2	General Industrial	£2,774,840	166	£16,720	£29
B8	Storage & Distribution	£11,669,070	545	£21,410	£28
D1	Non-residential institutions	£2,995,480	193	£15,520	£57
D2	Assembly & Leisure	£841,530	31	£27,150	£35

## Haringey's Business Support Offer

There is a range of business support available for Haringey's businesses. This includes support which is only provided within Haringey, and support which is offered to a wider North London or pan-London geography.



Map No.	Business Support	Offer Reach	Offer
1	The Trampery Tottenham	Haringey	Formally the 639 Enterprise Centre, the facility includes 30,000 sq ft. of workspace. Training an support includes free desk space for 6 months for selected start-ups.
2	The Business Lounge, Wood Green Works	Haringey	Covering 13,000 sq ft. with co-working office space as well as space for events, workshops and training.
3	Federation of Small Businesses (FSB)	London	A membership organisation that offers benefits including legal advice, business banking and pension schemes to small and micro businesses. As well as hosting networking and workshop events.
4	North London Chamber of Commerce	North London	Offers regular networking events, lobbying and signposting for businesses. The Chamber also offers sector specific group support for the construction and logistics sector.
5	Enterprise for London (EFL)	London	EFL offers local start-up support to help new businesses grow and launch. With mentoring, advice and financial support.
6	National Enterprise Network (NEN)	National	An enterprise body representing the enterprise support sector offering an online tool allowing users to locate relevant business support.
7	Haringey Traders Association	Haringey	A local network of small & local traders and shops.
8	Bernie Grant Enterprise Centre	Haringey	Based in the Bernie Grant Arts Centre, workspace and studio space is offered for those in the creative, arts and fashion sectors.
9	Blue House Yard: Creative Workspace	Haringey	Offering private space to rent and public space for events and meetings.
10	The Chocolate Factory	Haringey	Offers offices, studios and workshop space to rent. In addition to co-working space
11	Euroart Studios	Haringey	Providing rental studios and workspaces for those in the creative & arts sector. The space offers collaborative benefits between users of the space.
12	Green Rooms	Haringey	An arts hotel that opened in 2016 offering meeting space for hire as well as large conference space.
13	Parma House	Haringey	Home to various creative industries businesses. Parma House offers rental office And studio space to SME businesses.
14	Tottenham Green Enterprise Centre	Haringey	An enterprise support service for young people. Services include 1-2-1 advice, training workshops and business incubation.

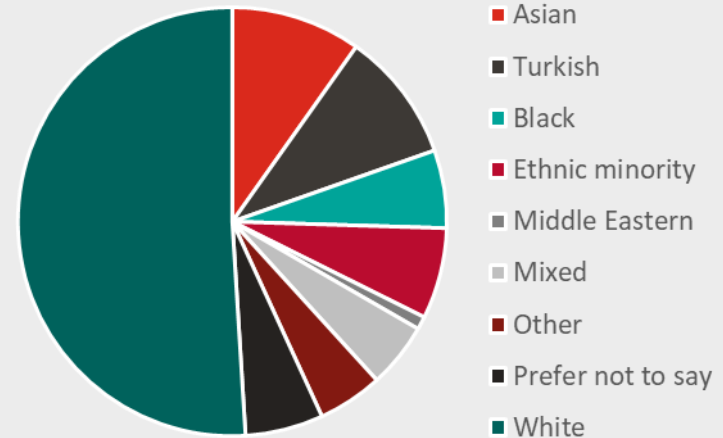
## Varying levels of diversity amongst business owners...

Evidence from the primary research suggests that around half of business owners in the borough are of a white background.

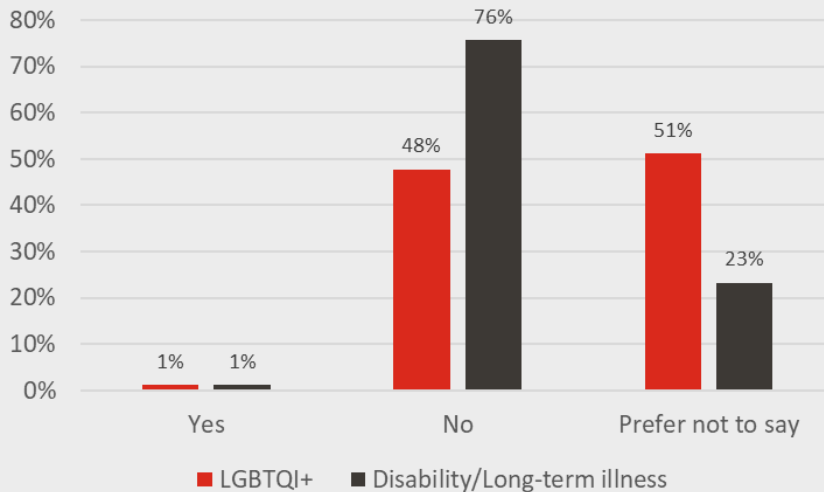
A much higher proportion of business owners were male, accounting for 84% of businesses spoken to. Only 12% of businesses that were spoken to were female-run.

Other business owner characteristics, including sexual orientation and disability, showed there was a lack of diversity amongst business owners, with only 1% of businesses reporting their owner was LGBTQI+ or disabled.

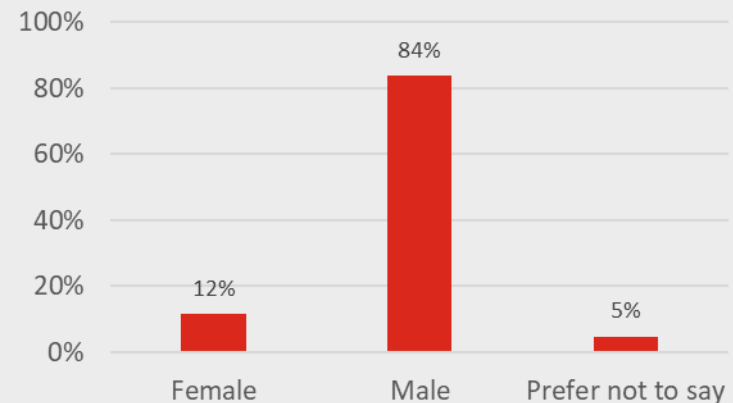
Business owners' ethnicity



Other business owner characteristics



Business owners' gender

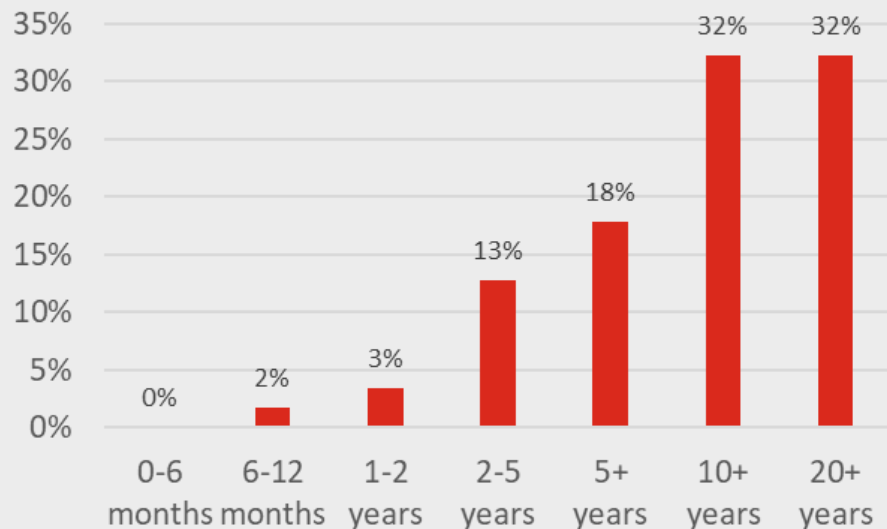


## There is a well established business base in Haringey...

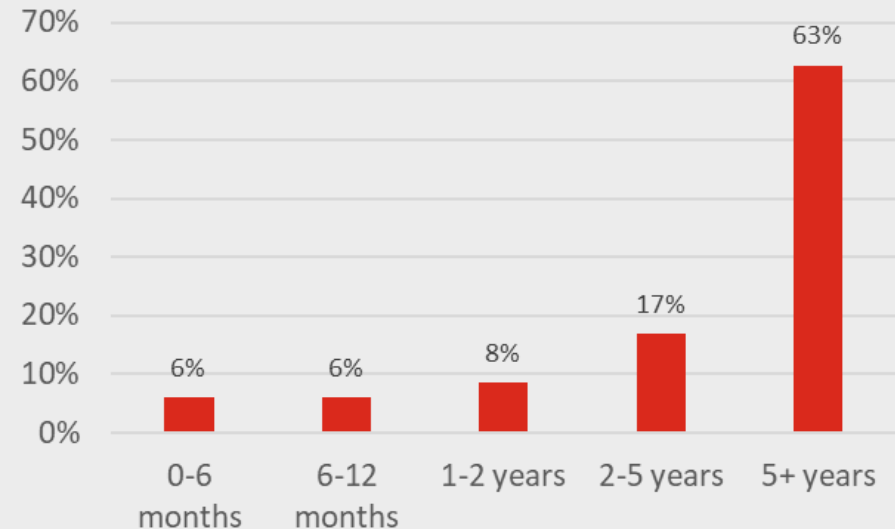
Evidence from the Haringey Business Survey suggests that Haringey has a well-established business base. Nearly two-thirds of those businesses who undertook the survey were more than ten years old (64% of businesses). The survey only identified a small number of businesses who had been operating for less than two years.

Once established in Haringey, businesses tend to remain at the same location for a long time. Nearly two-thirds of businesses have been in their currently business location for more than five years, with only 12% having moved in the last 12 months.

How old is the business?



How long has the business been in this location?

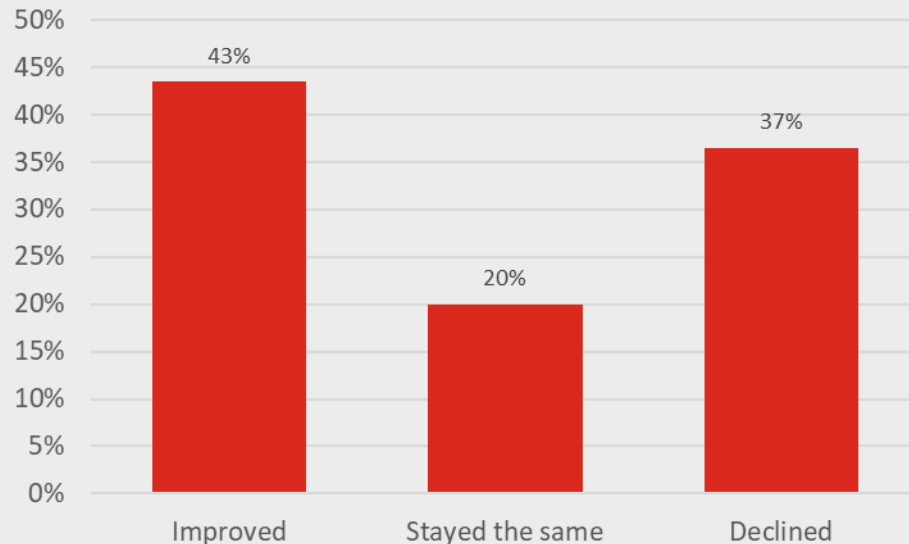


## Varying performance in recent business performance...

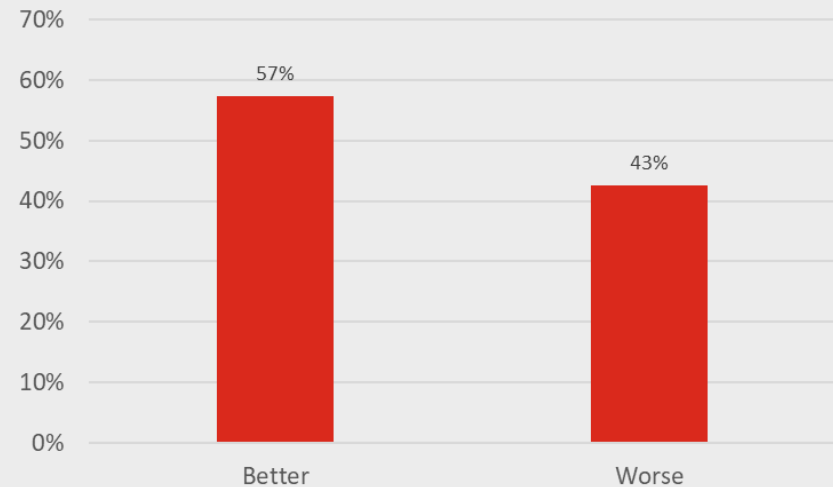
Haringey's businesses report a varied performance over the last 12 months. Although more businesses in the borough report an improved performance compared to 12 months ago (43% of businesses), more than a third of businesses reported a decline in the business performance over the last 12 months. This is a concern for the area, with declining business performance, suggesting that many businesses across the borough are struggling with the current economic uncertainty.

On balance, businesses' perception of Haringey has become more positive since locating in the area, suggesting that the area's reputation complements business activities well. The main areas where business perception has gotten worse are South Tottenham, Brantwood, White Hart Lane and Garman Road Industrial.

How would you characterize your business performance over the last 12 months?



Has your perception of Haringey become better or worse since you business located in the area?

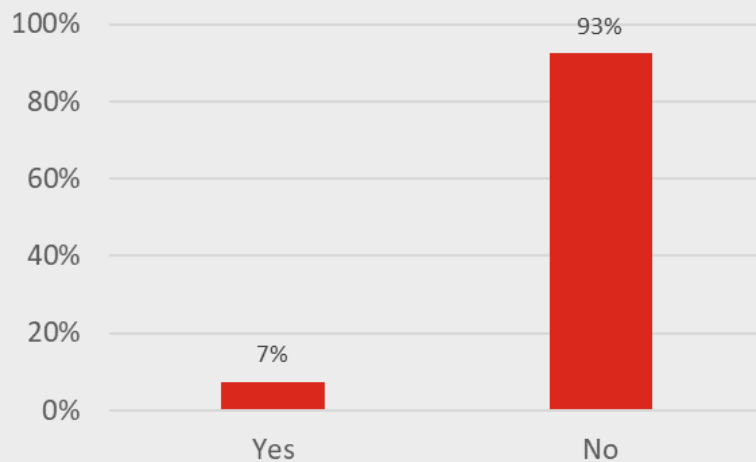


## Relatively low levels of engagement with local procurement opportunities and business support...

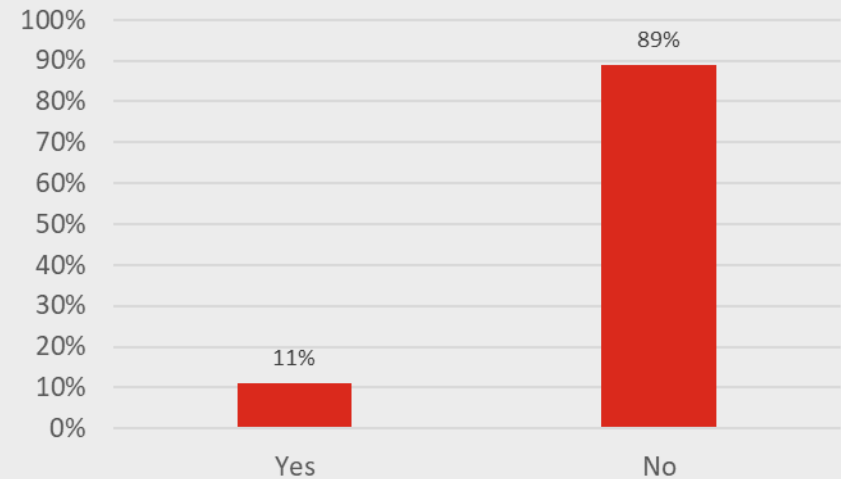
Businesses' interaction with the council appears to be small, particularly in relation to local procurement opportunities and the business support offered locally. Only 7% of businesses who were spoken to reported interacting with the local council through local procurement.

A slightly higher proportion of businesses said they had accessed business support over the last 12 months, although again this was still a relatively small proportion of all businesses (11%).

Has your business ever worked with the local council through local procurement?



Have you accessed any business support over the last 12 months?



## Haringey's businesses have a number of strong connections with local communities...

Haringey's businesses reported they had a number of interactions with the local community. These connections provide an important source of employment, training and social value to the local area.

The main activity businesses reported doing was providing in-work training for staff (81% of respondents), followed by taking on unemployed people (72%), contributing towards the local physical environment (65%) and paying reasonable wages in line with the living Wage (61%). as well as paying decent wages (51).

The sectoral breakdown of community engagement also reveals that generally businesses in the professional services and retail sectors tend to have stronger links to the community.

Percentage (%) of respondents engaging in community activities by sector

### Community links



	Arts and Culture	Digital and media	Manufacturing	Professional Services	Retail	Wholesale
<b>Worked with local community</b>	33%	0%	35%	56%	55%	25%
<b>Worked with local schools</b>	33%	0%	20%	31%	36%	6%
<b>Provided help or advice to members of the community</b>	33%	0%	30%	31%	50%	13%
<b>Offered any work experience, internships or apprenticeships</b>	0%	50%	40%	33%	18%	38%
<b>Taken on anyone who was unemployed</b>	0%	50%	70%	86%	73%	94%
<b>Provided in work training for staff</b>	33%	75%	90%	100%	91%	69%
<b>Been LW accredited/paid the living wage</b>	33%	50%	74%	64%	55%	46%
<b>Provided affordable space for the community</b>	33%	40%	15%	33%	9%	25%
<b>Contributed towards the physical environment</b>	100%	60%	55%	88%	82%	56%
<b>Other</b>	50%	0%	13%	0%	0%	15%

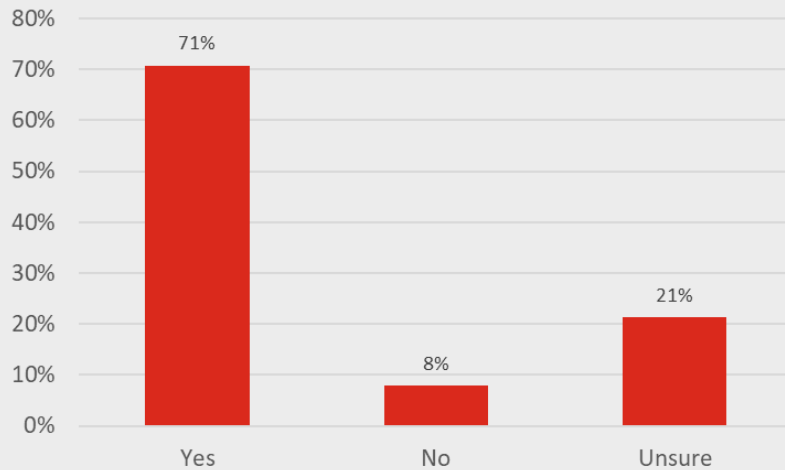
## Haringey's businesses generally have positive expectations for future performance...

Businesses are generally satisfied with their current location. More than three-quarters of businesses are either 'very satisfied' or 'satisfied' with their current location as a place to operate.

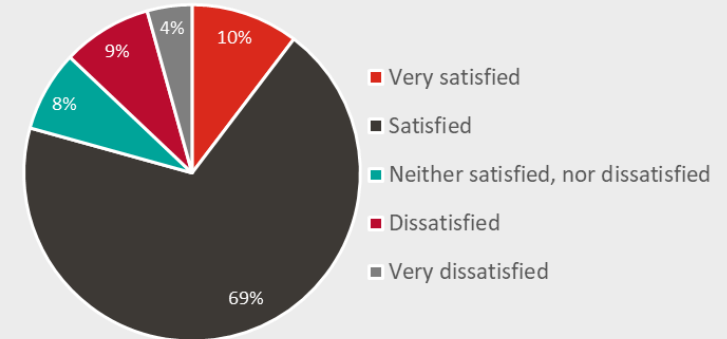
More than half of the respondents have a positive outlook towards the future, with a small number being very positive (7 businesses). Noticeably, no business is very negative towards the future. However, there is a significant proportion of businesses that are neutral.

Asked whether they expect to remain at their current location in the forthcoming three years, 71% businesses respond positively and 21% are unsure. Only 8% of businesses expect to move within the next three years.

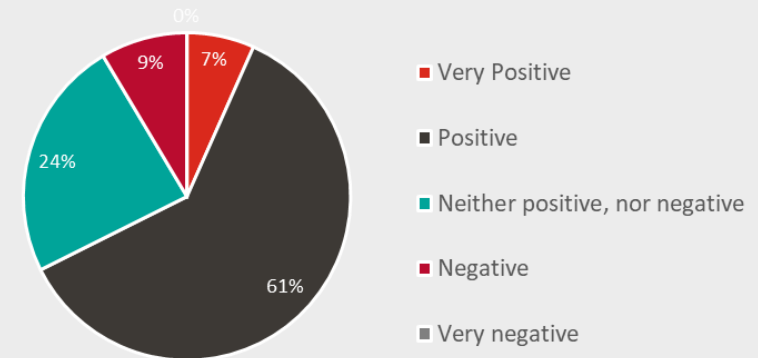
Do you expect to still be in this location in three years time?



How happy are you with your current location as a place to operate?



Thinking ahead over the next few years, how do you feel about the prospects for your business?



# 4. Industrial Sites



## Introduction & Overview

### Introduction

Haringey has traditionally had a strong industrial and manufacturing economy relative to the rest of London, with a high concentration of industrial estates to the East of the borough along the Lee Valley corridor. This has provided a range of opportunities for Haringey's residents, particularly around clothing, fabric and food manufacturing.

Across London, there is a growing demand for land for residential and commercial purposes which has put increasing pressure on London's industrial land.

To understand the current performance of industrial sites across Haringey, this section analyses some of the key performance metrics for industrial areas and details some of the distinct characteristics of these areas, as set within the wider strategic context of London's industrial land.

### Overview

The level of industrial floorspace has declined in Haringey in recent years. This has put increasing pressure on the remaining industrial stock in Haringey, which is reflected in the rental values, which have increased by over 60% in the last four years.

There are a number of issues that have emerged from our primary research, showing the current challenges faced by industrial businesses in Haringey. This includes high levels of crime, a lack of business support, traffic and congestion, Brexit, parking space and redevelopment.

## Snapshot

- + *Falling supply of industrial land is **putting pressure** on space that remains, with 11% of employment floorspace lost in Haringey since 2011/12.*
- + *Continued demand for industrial space (and reduced supply) has seen **rents increase by 60%** in the last 4 years.*
- + *The diversity of uses in Haringey's industrial estates is rapidly changing, with **increasing demand for space** from creative, artist and digital sectors.*
- + *Industrial estates with **strong transport connectivity** are generally those which are performing the strongest.*

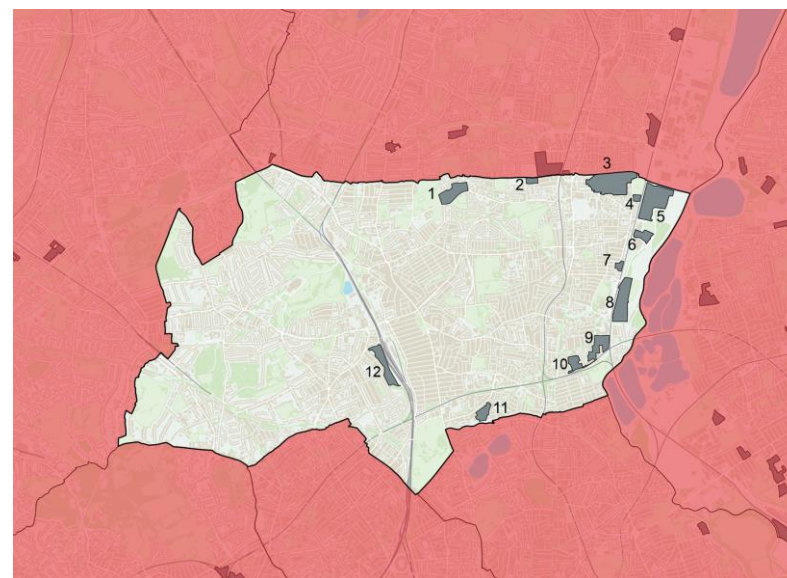
## Industrial sites are largely concentrated along the Lee Valley...

Haringey has a mix of different industrial sites, with many of these concentrated towards the east of the borough along the Lee Valley. There are two prominent types of industrial land:

**+ Strategic Industrial Locations (SIL):** these are industrial sites identified through the London Plan which should be managed proactively through a plan-led process to sustain them as London's largest concentrations of industrial, logistics and related capacity for uses that support the functioning of London's economy. There are 55 SIL areas across London, of which two primary sites are located in Haringey (part of Central Leaside and Tottenham Hale, both of which are made up of smaller industrial sites).

**+ Locally Significant Industrial Sites (LSIS):** these are well-established areas in which the aim is to retain them solely for uses that fall within B1 (b), B1 (c), B2 or B8 uses. Haringey has a number of these located in the borough, particularly along the Lee Valley.

The adjacent map and table shows the locations of Haringey's SIL and LSIS sites.



Map No.	Site Name	Site Designation
1	White Hart Lane	Locally Significant Industrial Site (LSIS)
2	Queen Street	Locally Significant Industrial Site (LSIS)
3	Brantwood	Strategic Industrial Site (SIL)
4	Willoughby Lane	Locally Significant Industrial Site (LSIS)
5	North East Tottenham	Strategic Industrial Site (SIL)
6	Marsh Lane	Strategic Industrial Site (SIL)
7	Lindens/Roseberry Works	Locally Significant Industrial Site (LSIS)
8	Millmead	Strategic Industrial Site (SIL)
9	South Tottenham	Locally Significant Industrial Site (LSIS)
10	Rangemoor Road	Locally Significant Industrial Site (LSIS)
11	Vale Road/Tewkesbury Road	Locally Significant Industrial Site (LSIS)
12	Cranford Way	Locally Significant Industrial Site (LSIS)

## Declining industrial floorspace within the borough...

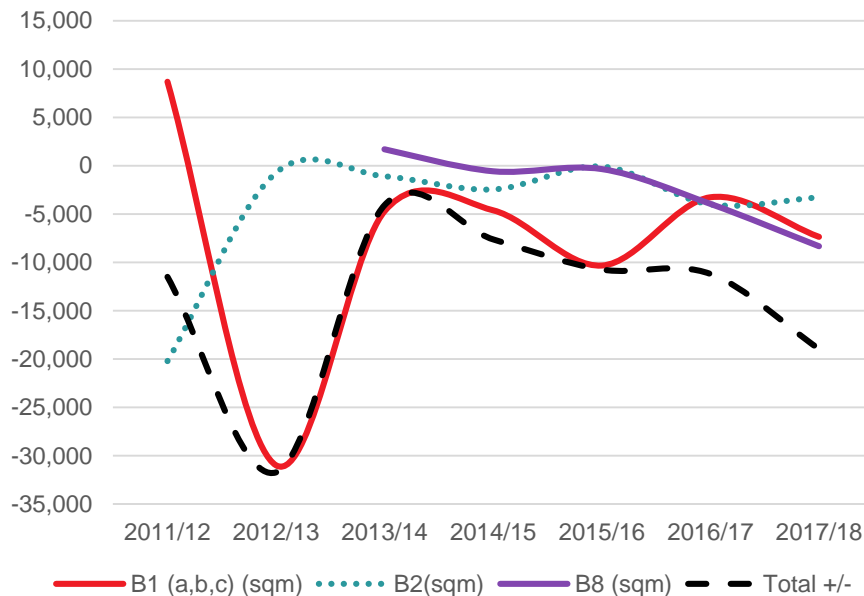
Floorspace available for employment uses has declined in Haringey over the last five years, putting increased pressure on employment floorspace that has remained. Beyond some minor positive changes (B1 floorspace in 2011/12 and B8 floorspace in 2013/14), floorspace across all types has declined every year.

Total employment floorspace has fallen by 95,805 sqm between 2011/12-2017/18. Looking at the types of employment floorspace, B1 employment floorspace accounts for over half of this total negative change, with B2 making up a third of this loss in employment floorspace. For reference, data from VOA shows there being 800,300sqm of employment floorspace in Haringey (B1, B2 & B8), meaning around 11% of employment floorspace has been lost since 2011/12.

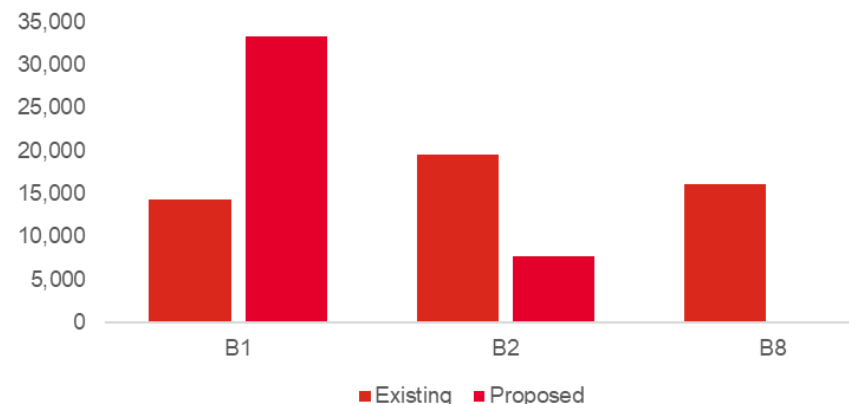
Challenges around industrial land are prevalent across London. Since 2010, industrial land in the capital has fallen by an annual rate of around 106 ha per annum. Restrictions in the availability of employment floorspace, particularly industrial floorspace supply have caused prices to increase well ahead of national benchmarks.

Looking forward, it is expected that B2 and B8 space is expected to decline further in Haringey. The London Development Database (which tracks planning consents where more than 1,000m2 of employment floorspace is being changed) shows that the amount of B2 and B8 space is expected to decline by 11,900sqm and 16,100sqm respectively based on currently consented schemes.

Changes in Employment Floorspace, 2011/12-2017/18



Projected Change in Employment Floorspace (sqm) in Haringey for Consented Schemes

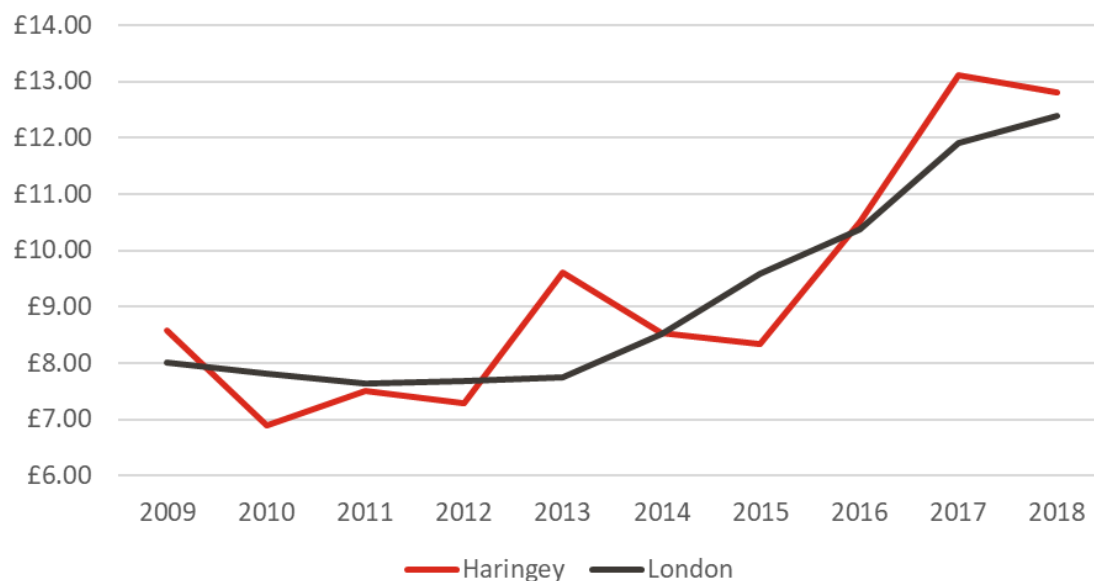


## But continued demand for industrial space, leading to rising rental values...

Haringey's relatively strong representation in the manufacturing sector compared to other areas in London reflects the presence of significant strategic and local industrial areas in the borough. The Haringey Local Plan sets out aspirations to retain this land, whilst also considering means of balancing the needs of competitive industrial and manufacturing activities with those of the service and warehousing sectors with significant growth potential.

This Local Plan stance reflects the strong demand for industrial space in Haringey, which is partly the result of diminishing industrial land available across London. The strong demand for industrial space is reflected in rental values, which have increased from approximately £7 per sqft in 2010 to nearly £13 per sqft in 2018. This has followed a similar trend experienced across London. There was a particularly rapid growth in industrial rental values between 2015 and 2017 in Haringey, reflecting strong demand for space and falling supply.

Industrial Rental Values in Haringey Relative to London (per sqft)



## Haringey's industrial estates have variable quality...

Haringey's industrial locations vary both in terms of their quality and therefore rental values. To understand the quality of industrial estates in Haringey, quantitative (presented on this page) and primary research (presented on the following page) has been undertaken.

Data from CoStar reveals that the average rental price for industrial sites in Haringey is nearly £13 per sqft. This varies across different locations in the borough. As a rule of thumb, those industrial locations towards the south of the borough tend to fetch a higher rental value than those to the north, with South Tottenham having the highest rental value for industrial space (£17.40 per sqft).

CoStar also provides data on the quality of a building, based on a five star rating system (further details of which are provided later in this chapter).

Based on the CoStar rating system, it finds that the highest quality industrial sites are White Hart Lane, Cranford Way and Queen Street.

Source: Co-star, 2018

Note: Data unavailable for Marsh Lane and average rent data unavailable for Lindens/Rosebery Works. Average date of sites have used Haringey.gov maps available here: [https://www.haringey.gov.uk/sites/haringeygovuk/files/final\\_haringey\\_site\\_allocations\\_dtp\\_online.pdf](https://www.haringey.gov.uk/sites/haringeygovuk/files/final_haringey_site_allocations_dtp_online.pdf)

### Quality and Rental Price of Industrial Estates and Sites in Haringey 2018

	Site	Average rent per sq. ft	Average rating
SIL	Millmead and Ashley Road	£11.80	2
	Brantwood	£13.60	2.3
	North East Tottenham	£11.60	2
	Marsh Lane	Not enough data available	
	Cranford Way	£11.60	3
	Lindens / Rosebery Works	Not enough data available	
LSIS	Queen Street	£11.60	2.5
	South Tottenham	£17.40	2.2
	Vale Road / Tewksbury Road	£14.70	2
	White Hart Lane	£12.90	3
	Willoughby Lane	£10.80	2

Note: 2 Star industrial buildings are likely to be "smaller and for unique industrial uses" with "limited functionality" and the "lowest rents in the market."

3 Star industrial buildings are likely to be "smaller structures with lower eaves heights" with "limited land for expansion and access" and currently at "average or near average market rents."

## Relatively low crime levels in industrial areas, but not reflected in primary research findings...

Many businesses located in industrial locations cite crime as being a particular issue, with this deterring people visiting these areas (which is particularly important for those businesses with a retail / service presence).

Evidence from the Metropolitan Police finds that crime incidence is highest in South Tottenham and Brantwood, with 36 and 17 reported occurrences respectively over the last three months. There are a minor number of incidences reported in North East Tottenham, Cranford Way and Vale Road/Tewksbury Road.

This reflects crimes which specifically take place on industrial estates, but does not reflect the wider feeling of safety and security on many of these estates which is reported through the primary research.

	Site	Number of Crimes Committed in Last 3 Months
SIL	Millmead and Ashley Road	0
	Brantwood	17
	North East Tottenham	4
	Marsh Lane	0
	Cranford Way	2
	Lindens / Rosebery Works	0
LSIS	Queen Street	0
	South Tottenham	36
	Vale Road / Tewksbury Road	2
	White Hart Lane	0
	Willoughby Lane	0

## Insights from the Primary Research

- + **Crime:** Issues vary between businesses of different sizes and the areas they operate in but crime (theft and drug-dealing) was cited as a recurring issue across respondents. There is a general feeling that the council is unresponsive to complaints in these areas (especially those related to crime).
- + **Business support:** None of the businesses surveyed use business support but smaller businesses were more likely to consider applying for business support (e.g. grants/loans). Many businesses were unaware of the support that is available to them.
- + **Traffic:** was cited as a common problem faced by businesses, especially on match days around Tottenham Hotspur Stadium, where areas like Brantwood and Garman getting heavily congested and slowing down business activity. Construction works around the highway was also highlighted as a barrier to business activity.
- + **Brexit:** this theme was cited by companies who undertake a high level of importing and exporting activity (e.g. wholesale businesses). These businesses anticipate challenges with import/export costs of their products.
- + **Parking space:** businesses (especially wholesale and cash and carry businesses) feel that there is not enough parking space near their working areas and that this is acting as a barrier to suppliers/employees accessing the site, creating delivery delays and negatively affecting customers.
- + **Redevelopment:** some businesses are concerned about potential future residential development in the area, and the lack of information around the council's motives with redevelopment in the area is creating uncertainty for businesses.
- + **Big businesses:** some are thinking of relocating because there is poor public transport accessibility for their employees, and space constraints in terms of parking space for their employees and expansion space. Some big businesses feel like the Council is not responsive enough to the needs of long-term businesses in the area. Enfield was repeatedly referenced as an alternative place to relocate to.
- + **Skills shortage:** some businesses encounter difficulties in hiring local people, finding staff with basic skills (e.g. communication, business acumen skills) and apprenticeships.

## Insights from the Primary Research

Site	Insights from Primary Research
Millmead and Ashley Road	Is a highly dynamic area, with a recently influx of smaller creative businesses in addition to the existing business profile. There is a high demand for space in the area, particularly from creative businesses keen to be near Tottenham Hale station. Not a very congested industrial estate compared to others, with less traffic on the roads.
SIL	
Brantwood and Garman	Brantwood: Well-defined industrial area, which is very busy. Large number of cars parked in the area, causing congestion on site. Site is difficult to get around. Garman: relatively quiet on weekdays, small number of large companies. Mainly logistics or wholesale businesses. Buildings appear dilapidated. Area relatively to reach. Closing of level crossing has had a negative impact on small garages, leading to a declining customer base.



Millmead



Brantwood

## Insights from the Primary Research

Site	Insights from Primary Research
Cranford Way	Presence of long-established businesses (FedEx, Jewson). Some units appear to be vacant. Not a large amount of activity – partly due to the logistics nature of activity. Not very well connected but good train access via Hornsey station.
Lindens / Rosebery Works	Relatively dated area in need of updating. Units with a retail presence struggle to attract people into the area, as it is relatively quiet.
Queen Street	Extremely quiet area, being a small industrial piece of land surrounded by a residential area. Large number of vacant units. Buildings looked old – leaking roofs and issues of drainage. Good frequent bus service.
LSIS South Tottenham	Mix of commercial units and creative units. Many spaces classified as “work and live” units. Artists feel that the area has a lot of potential to grow but non-creative businesses expressed concerns over redevelopment (becoming like Hackney) and gentrification/affordability issues. Reports of there not enough parking despite there being many empty residential parking lots during the day. Concerns expressed over intensity and high levels of crime/insecurity, especially at night. Five Miles = key anchor in the area engaging with the local communities, but crime is threatening their growth prospects.
Vale Road / Tewksbury Road	Many garment/clothing distributors and wholesalers located in the area. Poor business performance overall. Business rates being too high are an issue – businesses feel that they are getting priced out of the area.
White Hart Lane	Larger businesses (franchises of national brands: Selco, Top Tiles). Area interspaced with residential land. Businesses highlighted concerns over safety.
Willoughby Lane	Estate is extremely dense and busy – parking is an issue in this area. Industry is quite specialised : mainly garages and body repair shops. High competition among businesses.



Queen Street



South Tottenham

# 5. Workspace



## Introduction & Overview

### Introduction

To better understand the types of workspaces available in the borough, and the current market for these, this section establishes a more detailed review of workspace supply and demand. Workspaces includes coworking spaces, incubators, accelerators, artists' studios and makerspaces, but covers a diverse range of uses. They tend to have shared resources (e.g. physical spaces), flexible access and are curated spaces, managed and designed to facilitate interaction between users.

Our analysis of workspace supply has built on statistical evidence to understand the type of workspace available in the borough. The demand for workspace draws on commercial property market data alongside wider research which has been undertaken in Haringey.

### Overview

Haringey has a diverse range of workspaces across the borough, including a mix of office, retail and industrial space. The workspace market has experienced rapid growth in values in recent years, following trends experienced across London.

Strong demand for workspace, both locally and across London, has led to a marked shift in the local workspace market in recent years. Many of Haringey's workspaces have congregated around key employment or industrial locations which have good transport access, with concentrations around Seven Sisters and Tottenham Hale.

## Snapshot

- + *The evidence suggests there are **21 workspaces** across Haringey. Two-thirds of these workspaces are **creative & artists workspaces**.*
- + *There is a strong concentration of workspaces around **Seven Sisters and Tottenham Hale**.*
- + *Demand for workspace is strong, with rental values for commercial space all **increasing rapidly** over the last five years.*

## Reasonable Supply of Workspace in Haringey...

Workspace can incorporate a wide range of different uses, supporting a wide range of industries. The mapping of workspace in Haringey has focused on premises which offer space for SMEs, start-ups and co-working, therefore including any provision that explicitly offers flexible, short-term or membership-based leasing terms. High-spec, commercial office space is not the focus of the supply mapping.

The workspaces identified through this mapping exercise therefore range from managed workspace buildings, to specialist artist studio provision, to individual deskspaces offered in larger existing office or studio spaces. This analysis builds on work undertaken by the GLA (in their Infrastructure and Open Workspaces Map), which sought to identify workspaces across London.

The analysis identifies 21 workspaces across the borough. Of these, there is a high proportion of creative & artists workspaces (accounting for two-thirds of all workspace identified).

### Provision of Workspaces in Haringey, 2019

Type of Workspace	Description	Number in Haringey
Incubator, Accelerator & Co-Working Spaces	<ul style="list-style-type: none"> <li>Typically catering to start-ups and small-to-medium sized enterprise, these workspaces offer desk space(s) on flexible monthly leases or membership schemes.</li> <li>Business support, networking events and channels to investment or start-up support are usually incorporated into the workspace offering.</li> </ul>	1
Creative Co-Working Space	<ul style="list-style-type: none"> <li>Individuals or businesses letting out excess desk space(s) in existing office or studio set ups.</li> <li>These offerings allow for short-term and short notice desk use in workspaces that are already operating office spaces</li> </ul>	3
Creative & Artist Workspace	<ul style="list-style-type: none"> <li>Provide workspace for creative practice and artistic activities. This typology spans workspace for creative uses that may have additional spatial requirements above and beyond those found in office-type workplaces</li> </ul>	14
Makerspace	<ul style="list-style-type: none"> <li>Typically open access workshops providing shared workbench space, equipment and machinery, typically through membership schemes, for users for design, prototyping or production activities.</li> </ul>	3

**Workspaces are concentrated to the south-east of the borough, matching areas which have experienced strong business growth in recent years...**

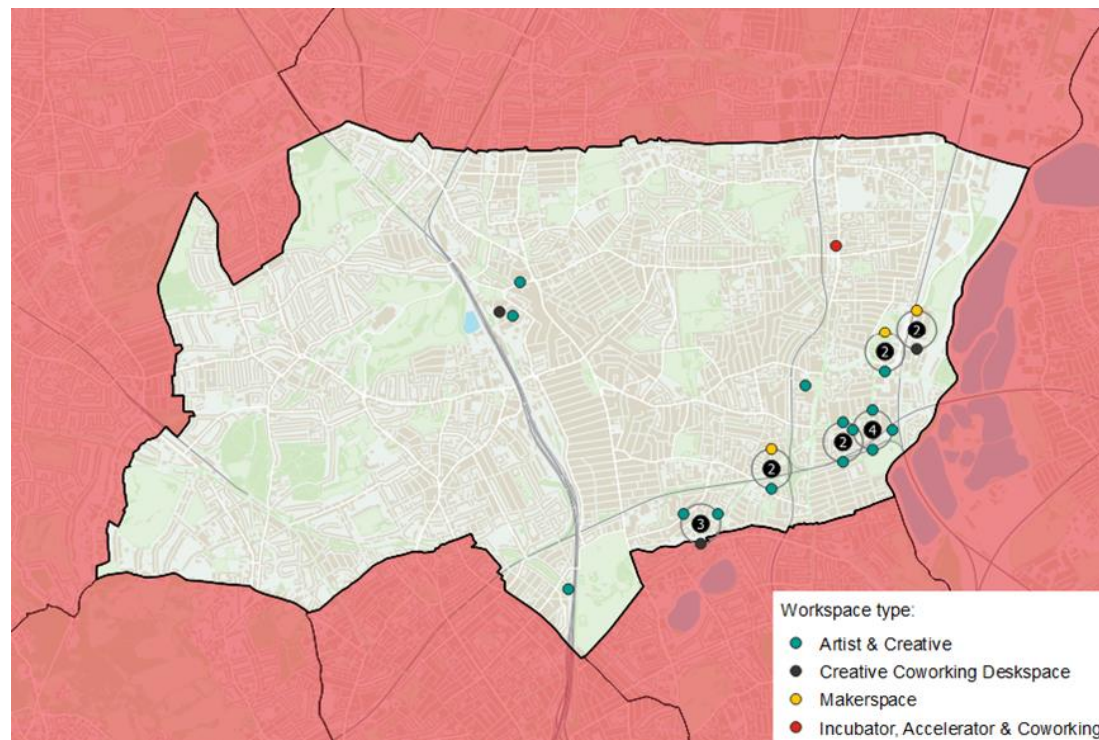
The map demonstrates the spatial distribution of workspaces. Supply is concentrated in the South East of Haringey, particularly around the Seven Sisters and Tottenham Hale areas, which are those areas in closest proximity to the Victoria Line and Hackney.

Workspaces in the South-East of the borough typically cater for more creative and maker activities.

Given the current concentration of workspace in the South-East of the borough and them catering towards creative and maker activities, opportunities to improve the provision of workspace across the rest of the borough should be supported. This should particularly be the case when schemes are brought forward in town centres or other employment areas, in close proximity to transport infrastructure.

In providing more workspaces across the borough, Haringey can better support its high proportion of self-employed professional workers, many of whom would benefit from flexible and affordable workspaces.

Location of Workspaces in Haringey, 2019



## Strong demand for workspace in Haringey, but not as high as comparator areas...

Rental values for office and industrial space in Haringey are comparable to those experienced in other outer London boroughs. Office rental values in Haringey are comparable to those in Barnet, Enfield and Waltham Forest, but are behind the level experienced across London. For industrial premises, rental values are comparable to those across London, with rents comparable to those in Barnet, Waltham Forest and Enfield.

The Haringey Workspace Viability Assessment (2014) notes the following sector mix of workspace occupiers:

- + Art, fashion and creative industry, 36%
- + Light industrial, Mixed, 14%
- + Industrial, 11%
- + Professional services, 10%
- + Startups, 8%
- + Mixed, 8%
- + Others, 13%

Average Commercial Premises Rental Value, per sqft, 2018

	Office	Industrial	Light Industrial
<b>Haringey</b>	<b>£22</b>	<b>£13</b>	<b>£15</b>
Barnet	£21	£12	£17
Camden	£55	£32	£33
Enfield	£20	£10	£35
Hackney	£47	£17	£38
Islington	£50	£25	£30
Waltham Forest	£20	£14	£14
London	£50	£12	£20

## Strong demand for workspace expected to continue...

According to the Haringey Workspace Viability Assessment (2014), since the most suitable workspace types for the borough are of B1 and B8 classification, forecasts of strong growth in office and warehouse sector would justify workspace expansion.

The demand projections for B use class floorspace need from the 2015 Haringey Employment Land Review are demonstrated in the adjacent tables. Of the three forecast scenarios undertaken, the most and least optimistic are presented here.

In the first scenario, the forecasted increase in total floor space demand between 2011-31 is driven by demand growth in B1a/b and B8 floorspace. Scenario 3 projects a decrease in total floorspace demand, but consistently with before, demand for B1a/b uses increases. These projections seem to support workspace expansion in Haringey, especially of smaller workspace units.

The GLA Artists' Workspace study uses waiting lists to gauge artist workspace demand levels. It states that there are currently 3,500 artists on waiting lists for workspace across London. In certain cases, the ratio of studio numbers to waiting list numbers ranges from 160% to 2000%. It also states that in London, there are about 35,000 graduates from Art & Design Colleges annually, meaning there is likely to be continual demand for workspace going forward.

### B use class floorspace need (sqm) in Haringey, 2015

#### Experian-based Scenario (Scenario 1)

Use Class	2011	2021	2031	Change (2011-31)
B1a/b	226,600	294,000	329,200	102,600
B1c/B2	99,700	93,600	82,800	-16,900
B8	309,500	378,500	421,900	112,400
Total	635,800	766,100	833,900	198,100

#### Trend-based Scenario (Scenario 3)

Use Class	2011	2021	2031	Change (2011-31)
B1a/b	226,600	258,400	275,400	48,800
B1c/B2	99,700	82,600	89,700	-10,000
B8	309,500	283,900	257,700	-51,800
Total	635,800	624,900	622,800	-13,000

# 6. High Streets



## Introduction & Overview

### Introduction

Haringey has a diverse range of town centres across the borough, attracting a range of uses, visitors and businesses. Town centres have evolved beyond places where people shop – they provide an 'experience' for local residents and visitors, including leisure facilities/amenities, community facilities, as well as being a place where people live and work.

As high streets have evolved, their role has become increasingly important for local communities. Protecting the vitality and viability of town centres is an important focus of the London Plan, with a need to create strong, resilient, accessible and inclusive hubs with a diverse range of uses that meet the needs of locals.

This section provides an overview of Haringey's town centre performance, particularly the important role town centres have in supporting a fair and prosperous economy, in providing good jobs, improving the wellbeing of local communities, improving the environment, increasing fairness and supporting the health of local populations.

### Overview

Haringey's town centres are generally performing well. There is strong demand for retail space, reflected in the low vacancy rates across the borough and rising rental values. This goes against trends elsewhere, where high streets have struggled against the rise of online shopping.

Town centres will play an important role in supporting commercial and residential development in the future, with the potential to support new developments going forward. There are still a number of specific challenges facing some town centres, which need addressing to support the vitality of these areas.

## Snapshot

- + *There is **strong demand** for retail space across Haringey, especially in town centres. **Retail rental values have increased by 74%** over the last three years.*
- + *Vacancy levels are generally **low** across many of Haringey's town centres.*
- + *A number of town centres have a **high development potential**, both for commercial and residential purposes.*
- + *Concerns within some town centres regarding **safety, connectivity and cleanliness**.*

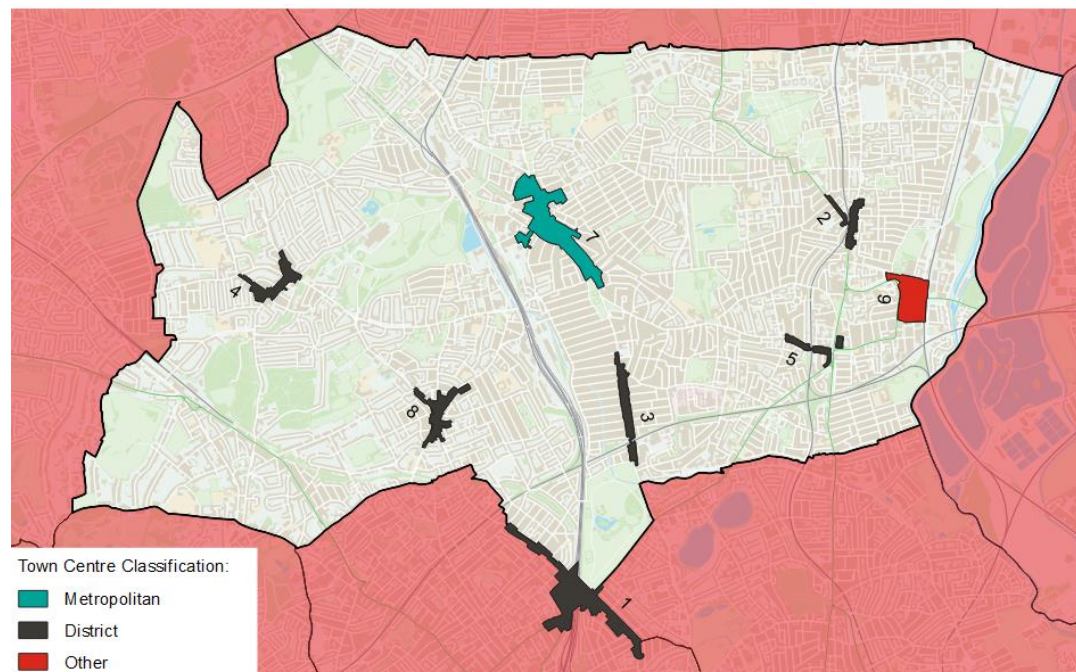
## Haringey has a diverse range of high streets...

Town Centres in Haringey, 2019

Haringey's Local Plan identifies a hierarchy of town centres within the borough. Given the diversity of roles and functions served by Haringey's centres, they have been categorised as follows:

- + **Metropolitan Centre:** town centres with a focus on higher order comparison goods retailing, with higher density employment opportunities, leisure and residential developments. Wood Green is the only metropolitan centre within Haringey.
- + **District Centre:** town centres with a focus on a viable range of functions, particularly convenience, leisure, local employment and workspace. There are five District Centres in Haringey.
- + **Local Shopping Centres:** these provide for the day-to-day needs of people living and working nearby. There are 38 of these centres in Haringey.

For the purposes of this report, the focus has been on those town centres identified within the Local Plan as being Metropolitan or District Centres, or town centres which are on the verge of becoming District Centres (Tottenham Hale).



Map No.	Site Name	Site Type
2	Bruce Grove/Tottenham High Road	District
3	Green Lanes	District
4	Muswell Hill	District
5	West Green Road/Seven Sisters	District
6	Tottenham Hale	Other
7	Wood Green	Metropolitan
8	Crouch End	District

## Haringey's High Streets are generally performing well...

Evidence from the London Town Centre Healthcheck database provides a useful starting point, when considering the role and performance of town centres in Haringey.

Wood Green is by far the largest town centre in the borough, with nearly as much comparison floorspace as the other centres combined. Green Lanes and Tottenham Hale are the next largest centres (when combining all the retail floorspace). The centre which had the highest level of vacant floorspace is Muswell Hill.

Summary Table of High Street Performance

High Street	Comparison Floorspace (sqm)	Convenience Floorspace (sqm)	Service Floorspace (sqm)	Vacant Floorspace (sqm)	Number of Employees (Estimated)	Number of Employees (Estimated)	Annual Comparison Goods Turnover (£m)
Wood Green	58,005	15,940	3,450	1,890	4,100	8,300	270,206,708
Green Lanes	10,840	9,300	3,180	860	500	3,400	13,612,668
Muswell Hill	9,100	5,050	3,930	3,020	500	2,700	59,955,765
Tottenham Hale	16,110	1,690	110	1,260	700	4,000	98,320,504
Crouch End	7,600	4,670	3,710	1,330	1,200	3,600	24,491,455
West Green Road / Seven Sisters	2,470	9,120	1,790	970	100	1,400	12,112,560
Bruce Grove / Tottenham High Road	4,750	3,100	1,160	1,190	200	2,000	32,212,398

## Retail rental values have increased dramatically in recent years...

Rental values for retail units have increased across many town centres, suggesting there is strong demand for retail units. Particularly strong growth has taken place in Bruce Grove/Tottenham High Road, Wood Green and Muswell Hill. Retail rental values are now comparable to the rate across London, with the average rental unit of £37 per sqft compared to £40 per sqft across London.

Around a fifth of all crime in Haringey takes place in its town centres. This largely consist of anti-social behavior, shoplifting and theft. The town centre with the highest number of crimes committed is Wood Green.

### Other Performance Indicators for Haringey's Town Centres

Town Centre	Rental Values		Crime
	Average Retail Value (2018) per sqft	Change in last 3yrs	Number of Crimes over the last 3 months
Wood Green	£41	86%	589
Green Lanes	£28	2%	92
Muswell Hill	£59	46%	101
Tottenham Hale	£27	n/a	161
Crouch End	£35	-3%	65
West Green Road/Seven Sisters	£39	31%	195
Bruce Grove/Tottenham High Road	£37	108%	145
Haringey	£37	74%	9,560
<i>London</i>	<i>£40</i>	<i>15%</i>	<i>N/A</i>

## Our Assessment of Haringey's High Streets...

High Street	Initial Reflections on the Town Centre	Footfall	Overall Impressions
<b>Wood Green</b>	Diverse offer of shops but lack of healthy food options. Need for public realm improvements. Need for more cultural events and entertainment for teenagers.	High	Convenient / Friendly / Local / Diverse / Cheap / Dirty
<b>Green Lanes</b>	Desire for more green spaces and cultural/music venues from local residents. Not enough space for children to play in the area. There is a strong Turkish community in the area, reflected in the mix of shops.	High	Well Connected / Safer than other high streets / Local / Diverse
<b>Muswell Hill</b>	Seen as a good for families. Great children toys, book store, library, and brilliant primary and secondary school. French market and Planet Organic is appreciated has added a good retail offer to the area.	Medium	Friendly / Clean / Safe / Convenient / Local
<b>Turnpike Lane</b>	Many affordable shops within the area. High proportion of oriental supermarkets. Local events are poorly advertised and could be a good focal point for the local community. Shrine Café operates as an important community gathering space in the town, but there is insufficient community space more widely.	High	Well Connected / Unsafe / Diverse



## Our Assessment of Haringey's High Streets...

High Street	Initial Reflections on the Town Centre	Footfall	Overall Impressions
<b>Crouch End</b>	Good shopping and parking options. There is room to grow a bigger daytime and evening economy in local bars and cafes. Good public amenities (library) but need for more communal space, public toilets and water fountains.	Medium	Local / Friendly / Convenient / Sociable
<b>West Green Road / Seven Sisters</b>	WG: does not appear to be as busy as other high streets, but very heavy traffic moving through the area leading to lots of congestion. Large proportion of hair dressers and grocery shops in the area. SS: the market is a great community asset but there is a need for more night venues (pub) and community/children space.	High	WG: Dirty / Chaotic / Difficult to find parking SS: Diverse / Local / Lively / Unsafe / Concerns over regeneration / gentrification
<b>Bruce Grove / Tottenham High Road</b>	BG: has a relatively low diversity in terms of its retail offer. High level of traffic moving through the area. Tottenham: users of the town centre report concerns over safety. There is a lack of advertisement around community events. The new stadium is key building but it is currently not as well embedded into the local area. There is a perception that lots of amenities are moving to Wood Green.	Medium	Not safe / Dirty / Boring / Loud



## Many town centres are to play an important role in supporting commercial and residential development in the future...

As part of the development of the London Plan, the GLA undertook a review of the role and function of town centres across London. This identified the role and function of town centres from a commercial and residential perspective, as well as understanding their potential role in aiding the regeneration process in local areas. Town centres were ranked on their broad future potential based on a range of indicators, before its indicative growth potential was ranked 'low', 'medium' or 'high'.

Town centres with 'high' potential for commercial space in the future includes Tottenham High. Town centre with 'high' potential for residential development includes Wood Green, Green Lanes and Tottenham Hale.

High Street	Regeneration		Commercial			Residential	
	Town centre % overlap with Area for Regeneration	Pipeline floorspace (sqm) for commercial	Indicative employment capacity	Indicative Growth Potential	Pipeline residential units	% of the Town Centre within an Opportunity Area or Intensification Area	Indicative Growth Potential
Wood Green	86%	Low	-	Medium	Low	High	High
Green Lanes	9%	Low	-	Medium	Low	Medium	High
Muswell Hill	0%	Medium	-	Low	Low	Medium	Low
Tottenham Hale	100%	High	High	High	Low	High	High
Crouch End	0%	Low	Medium	Low	Low	Medium	Low
West Green Road / Seven Sisters	100%	Low	-	Low	Low	High	Medium
Bruce Grove / Tottenham High Road	100%	Low	-	Low	Low	High	Low

## Some of the findings from our primary research...

**Public realm and public amenities:** while respondents perceived their areas as social and lively, there was a general feeling that more could be done to provide and improve public spaces on the high street to mix and congregate, through:

- + Public amenities: more cinemas, libraries, farmers markets, public toilets, water fountains
- + Creating child/youth-friendly spaces
- + Making the high street more accessible to elderly people (improvements to help them cross)
- + Free workshops and events
  - + To encourage cultural sharing (especially on high streets which are diverse but divided)
  - + To create a space that is attractive even when you don't plan to spend money
  - + To support young mothers
  - + To provide business training support and employment advice (especially around Bruce Grove)
  - + To keep young people busy and active (link to crime)

**Transport connections:** Most people were happy about transport connections to the high streets and would walk, or use the tube or bus to get to it.

**Safety:** came out as a top issue across all high streets. Stabbing and crime around Wood Green station was flagged, especially from 4-7pm. Respondents reported feeling that the police "don't prevent crime, they just react to it".

**Night-time economy :** Most respondents agreed that night-time economy activities should come after more was done around crime and policing. Younger people expressed a desire for a night club.

### **Diversity of businesses:**

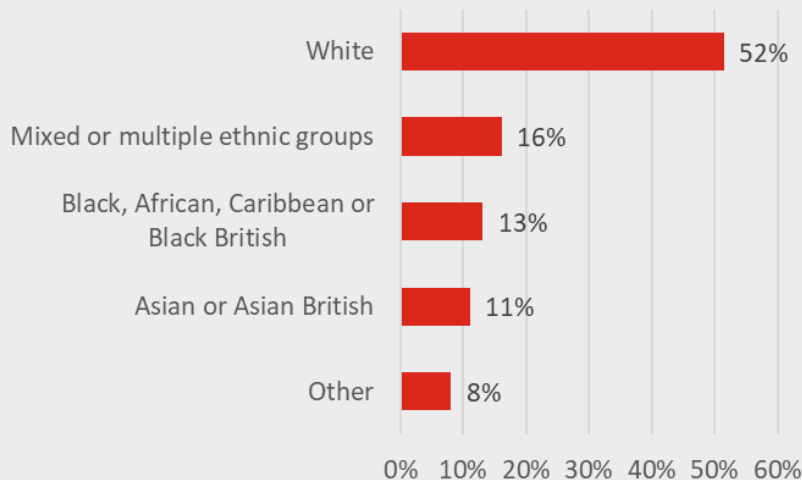
- + Some expressed concern over there being too many unhealthy fast-food joints on the high street but not enough affordable supermarkets
- + People tend to purchase more convenience goods than comparator goods in areas like Wood Green / Tottenham High Street but the inverse is true for Crouch End / Muswell Hill.

## High diversity of town centre users...

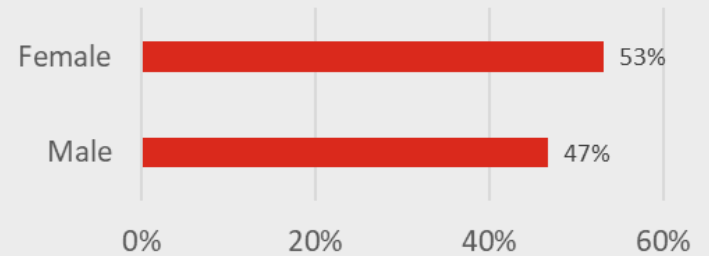
People using Haringey's town centres come from a variety of different backgrounds. Of those surveyed, there was a slightly higher proportion of female users relative to males, although the numbers were fairly balanced. Town centres attract people of all ages. Whilst a higher proportion of respondents were aged 45-64 (33%), 31% were aged 30-45 and 27% were aged 16-30.

The diversity of town centre users is also reflected in the ethnicity of users, with 52% of respondents being white, 16% being mixed or multiple ethnic groups, 13% are of black, African, Caribbean or black British background, 11% are Asian or Asian British and 8% identify with some other ethnicity.

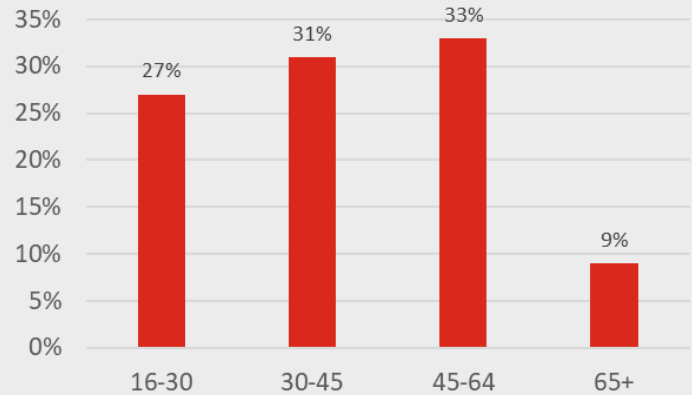
Ethnicity of town centre users



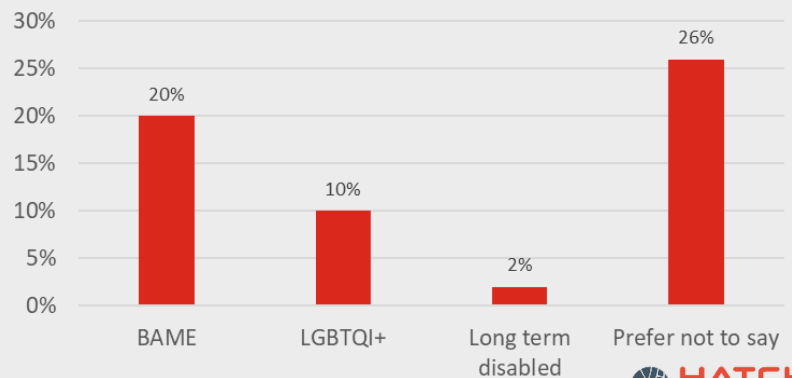
Gender of town centre users



Age of town centre users



Identity of town centre users

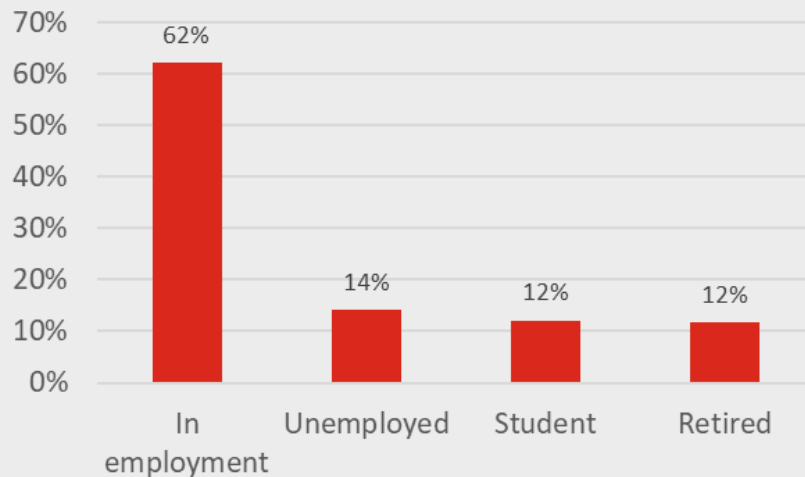


## High diversity of town centre users...

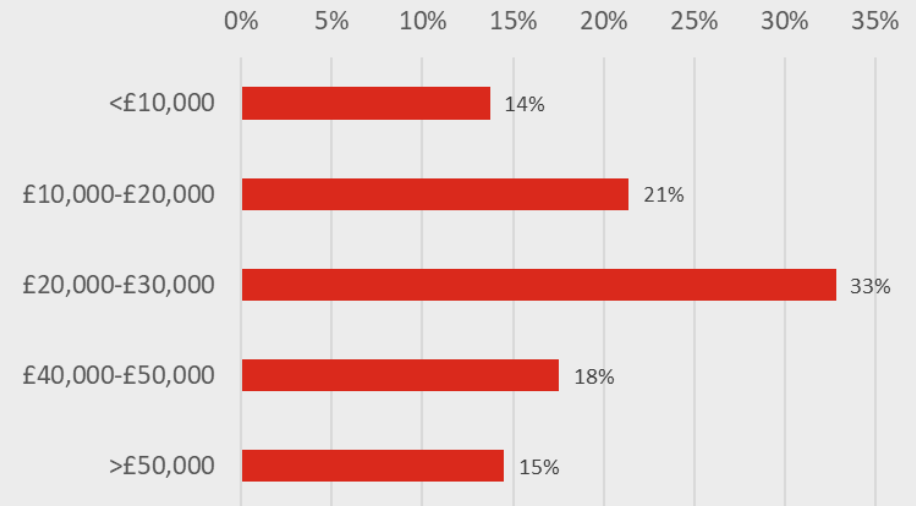
Haringey's town centres have a high diversity of users. Based on Haringey's current unemployment rate, a higher proportion of unemployed residents use the town centre compared to those in employment. Only 62% of those surveyed are in employment, compared to 74% amongst Haringey's residents (Annual Population Survey, ONS, 2018).

The household income of those using the town centre was typically between £20,000 and £30,000, accounting for a third of respondents.

Employment status of town centre users



Household income of town centre users

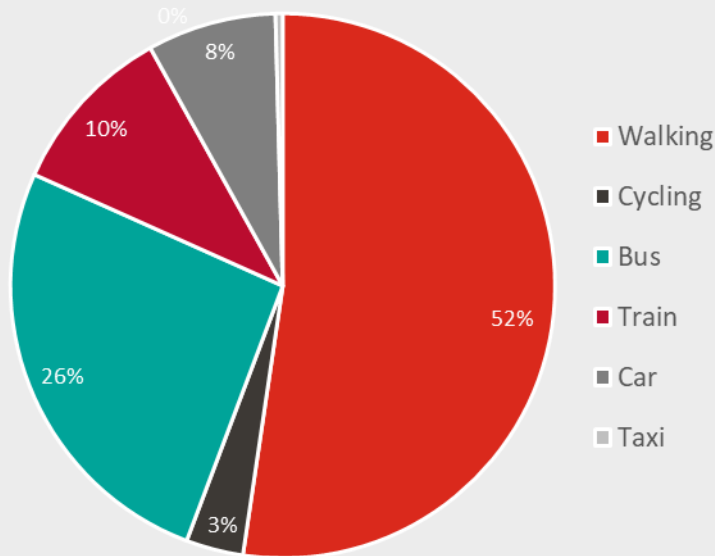


## There are a variety of reasons why people use town centres, although many travel by foot to reach them...

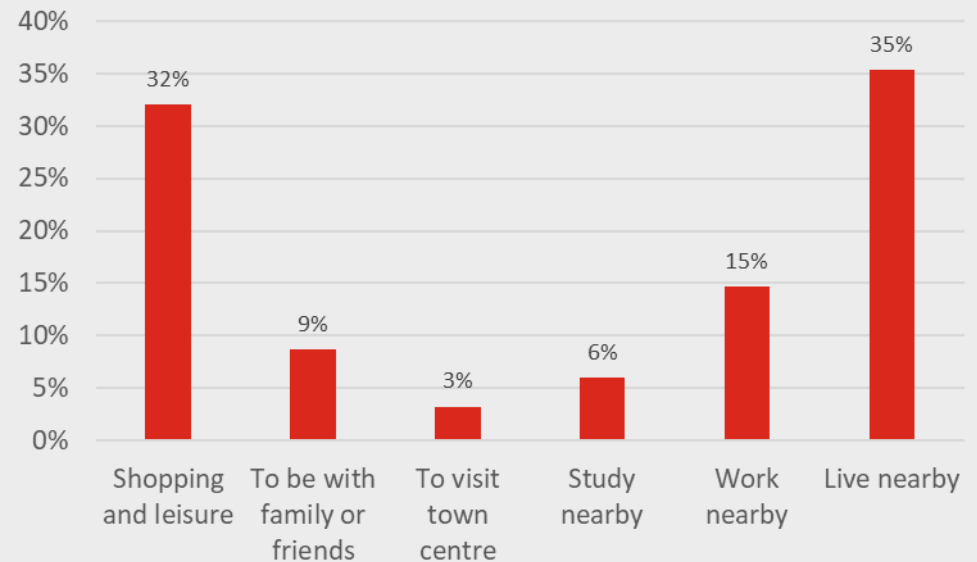
People using Haringey's town centres access the town centre in a variety of ways. Walking to town centres is the most common town centre users access the town centre. More than half of the respondents walk to the town centre, with the next largest transport mode being bus (26%). Less commonly used forms of transport for accessing the town centre includes train/tube (10%), car (8%) and cycling (3%).

Haringey's town centres offer a diversity of uses, attracting people for a variety of different reasons. Haringey's town centres are primarily visited by people who live nearby (35% of respondents) and for shopping and leisure purposes (32%). Working nearby is cited as reason for a town centre visit by 15%, whilst 9% visit the town centre to meet with family or friends.

Mode of Transport



Reason for visit

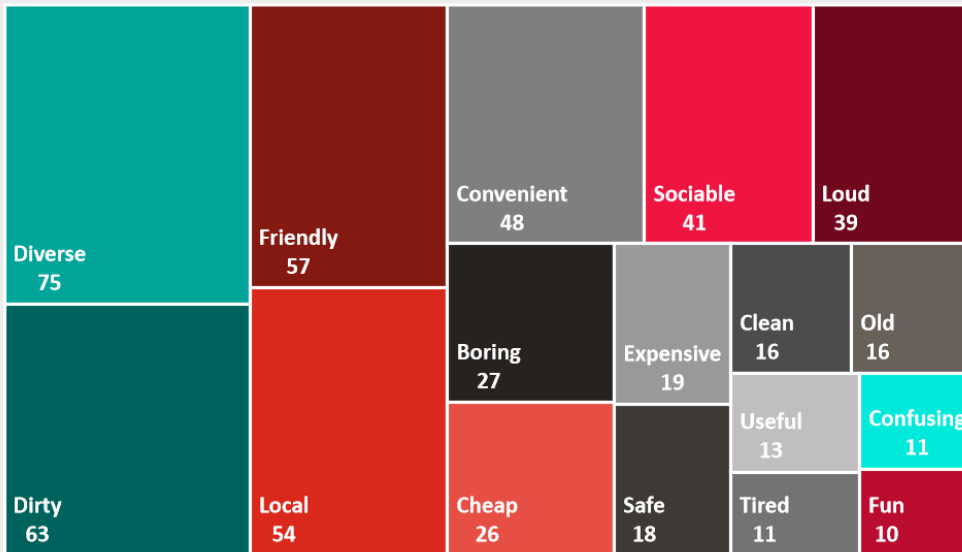


## Perceptions of town centres are generally positive...

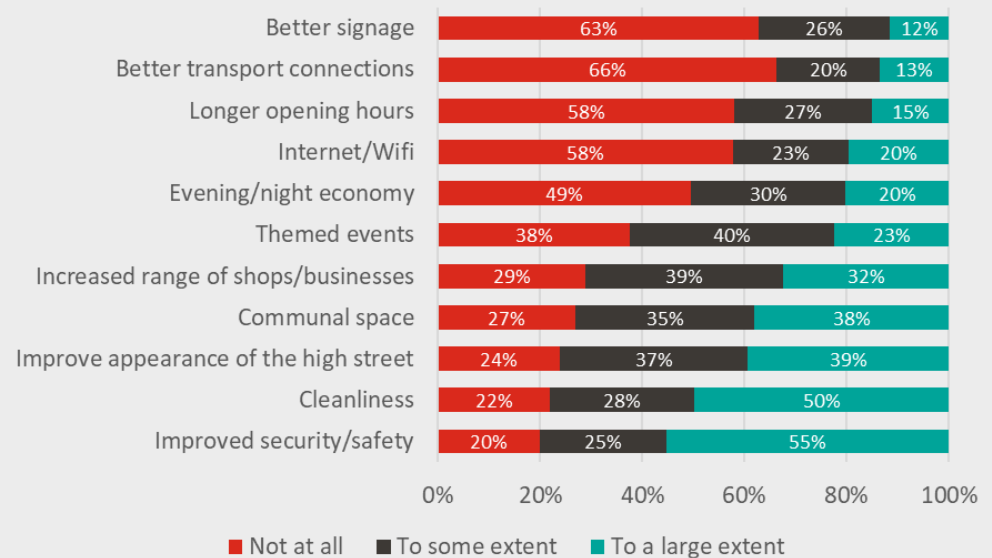
To understand how Haringey's town centres are perceived, respondents were asked to choose three (out of twenty one) words that best describe the town centre they visited. Haringey's town centres are predominantly viewed positively. Most often respondents describe them as diverse (75 selections), friendly (57) and local (54). However, 63 visitors consider them to be dirty.

A number of measures could be taken to encourage more frequent visits to Haringey's town centres. Improvements in security/safety and cleanliness emerge as priorities. Improvements in the appearance of high street, more communal space and increased range of shop and services could also be effective at encouraging more often visits to town centres. Amongst the least important concerns of the respondents are better transport links, better signage, internet/wifi access and longer opening hours.

Perception of town centres



To what extent would the following make you use the town centre more often?



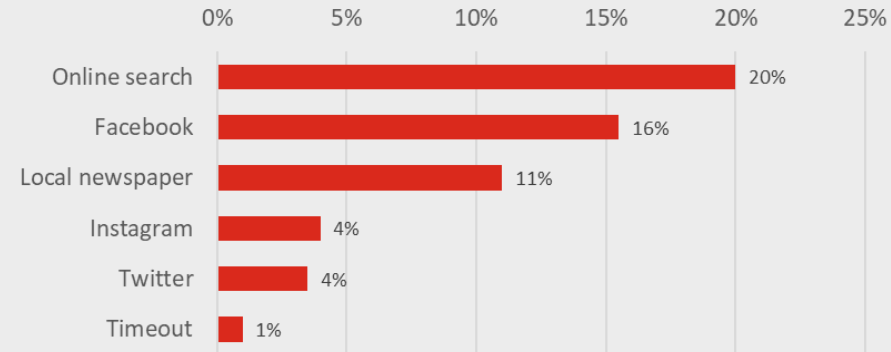
Source: Haringey High Street Users Survey, Hatch Regeneris, 2019

## But more could be done to encourage a night-time economy in town centres...

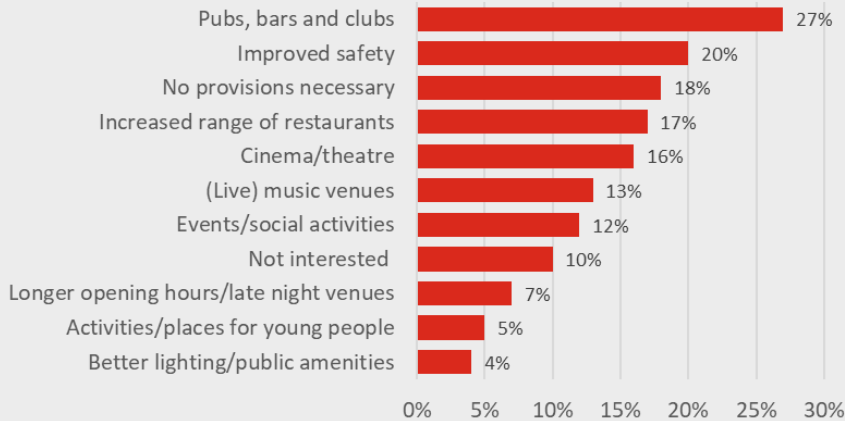
The most common way in which locals here about local events is through online searches or Facebook. Town centre users are in favour of more events and attractions within town centres, with music (35% of respondents), food and drink (29%), community (29%), films (29%) and free workshops (27%) being the most commonly cited events that people are interested in.

A number of suggestions were made regarding how the evening / night-time economy offer could be improved. Common suggestions of how it could be improved includes, more pubs, bars and clubs (27% of respondents),

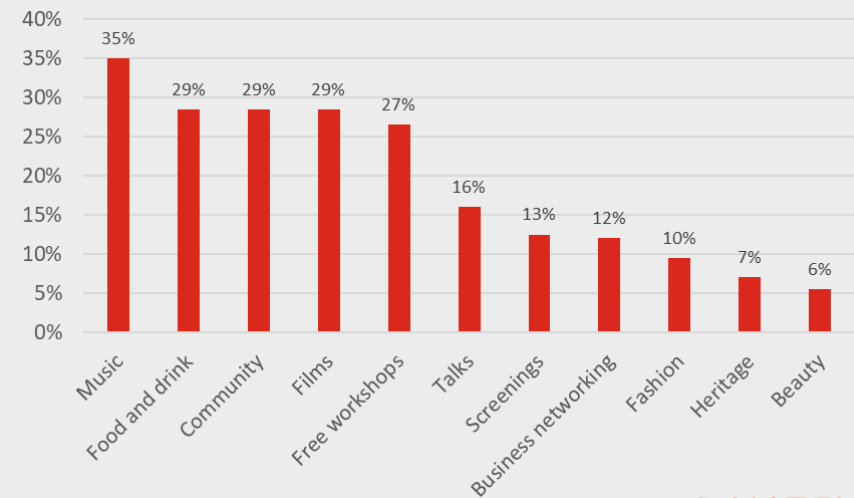
How do you hear about events going on in this town centre?



What kind of provisions would you like to have as part of the evening/night-time economy?



Are there any events you would like to see in this town centre?



# Summary & Key Issues for the Strategy

## S

### Strengths

- Haringey has a hugely diverse population, being home to people from a variety of backgrounds.
- There is a relatively strong labour market, with high levels of economic participation and low levels of unemployment
- Haringey has a well-skilled labour force, with 64% of working-age residents qualified to degree-level or above.
- Businesses established in Haringey have strong survival rates, with 90% of businesses started in 2017 surviving their first year of trading.
- Haringey has a diverse range of industrial sites, which provides a mix of employment space for traditional and emerging sectors.

## W

### Weaknesses

- The area has a high net-outflow of workers (43,321 workers each day).
- There are high levels of deprivation and low levels of social mobility, particularly to the East of the borough.
- Haringey is the sixth slowest growing London borough in terms of employment growth over the last five years.
- There is a disparity between the earnings achieved by residents and workers, with Haringey's residents earning £5,200 more than its workers.
- Haringey has lost a significant amount of industrial land in recent years. There is a need to secure employment floorspace long-term to support the local economy.

O

## Opportunities

- Haringey has ambitious targets to deliver 19,580 homes over the next ten years. This provides an opportunity to embed good practices into new developments and support the economic growth of the borough.
- Growth amongst the creative, digital and professional service sectors has the potential to deliver new jobs and opportunities to Haringey's residents.
- The Lee Valley Rail Programme provides an opportunity to improve transport connections in the east of the borough.
- The recent opening of the new Tottenham Hotspur Stadium provides new opportunities in relation to tourism and community participation.
- Regeneration taking place across the borough, particularly around Tottenham and Wood Green, presents an opportunity to engage local communities.

T

## Threats

- There is uncertainty surrounding the effects of Brexit on the local economy and how it will affect business and the labour market.
- Growing pressure for commercial and residential space is pushing up rents / land values across the borough, making it more unaffordable for some businesses / communities, and potentially pushing them out of the area.
- High streets and the retail sector are struggling to remain competitive with the emergence of online shopping. There is a need to ensure that town centres are able to diversify their offer, to become vibrant places where communities can come together.
- Low qualification levels to the East of the borough, means that some communities are unable to participate in the economic opportunities being generated across the borough.
- Businesses are concerned about the impact of crime on their performance, and the perception this has on the local area as a place to visit, spend time and money.



## Local Context

There is potential for **significant growth and change** in Haringey. Located within the LSCC, the GLA has set a target to deliver almost 20,000 new homes over the next ten years and the borough is home to a number of Opportunity Areas. However, delivering this housing is a challenge, with the borough currently **behind** in meeting its housing targets. To deliver the housing needed to support the borough's economy, there is a need for a **major step-up in delivery going forward**.

The **competing demand for space** in Haringey, is not unique to the borough, but requires a considered approach balancing the needs of businesses and residents. Developing a clear plan for the borough must ensure that developable land is built out as efficiently as possible.

Haringey faces a challenge in ensuring that its **future growth is fairer and more inclusive**. The borough has wide disparities in deprivation and faces a number of external challenges relating to Brexit, automation and the role of AI, and changes to retail and the high streets. The ethics of economic growth and environmental sustainability will have a significant impact on the future growth of London and Haringey. Ensuring Haringey has the agile workforce and businesses to respond to these challenges will be important in creating a **resilient economy**.

Aspirations within the London Economic Strategy and the Good Growth Agenda point towards **increasing the number of people in good quality work and creating a fairer and more inclusive London**. Haringey should ensure that its Economic Development Strategy aligns to the Mayor's aspirations for the city, both to benefit local communities and to ensure it is better placed to access GLA funding and resources to support growth.



## Employment

Although Haringey has a relatively strong labour market, with good levels of employment and participation rates, **clear imbalances and employment gaps exist** within the borough – including for gender and ethnicity. Rates of part-time employment are high and the wage levels of people working in the borough are below those of residents.

Haringey is **growing slowly**, being the sixth slowest growing borough in terms of employment growth over the last five years. This presents a major challenge to Haringey's growth aspirations, particularly in creating new opportunities for local residents. Making the borough a **more attractive place to locate, invest and grow** will be important in ensuring that Haringey can provide the right sort of jobs for those living in the area. Emerging growth within the creative and digital sector should be encouraged, with the right space provided to support the growth of these businesses.

The relationship between occupational level and distance travelled to work is important (with those in higher level occupations travelling further for work). This highlights the importance of providing a range of employment opportunities – particularly for lower level occupations – that are accessible to residents.

The proportion of residents earning less than the London

Living Wage exceeds the London average, Haringey **underperforms** compared to a number of neighboring boroughs. The borough is 16 percentage points below the best performing areas of Islington and Camden – where an additional 1 in 6 people are earning the London Living Wage. **Encouraging more businesses to pay the London Living Wage** will be important in helping to address some of the deprivation challenges faced in parts of the borough.



## Business

Haringey has a **strong local service offering**, with some emerging clusters of activity within the creative and digital sector. However, there remains a **strong dependence on public sector employment and other sectors that 'service' the resident population** – e.g. retail, arts and recreation. Although these are important sectors for serving local communities, they have been subject to more external pressures in recent years (e.g. austerity, online shopping) and are typically lower value sectors. **Diversifying the economy** will be important in making Haringey a resilient economy going forward.

Haringey has a **strong base of self-employed residents**, being one of the highest in London. Providing support to these residents, will be important in providing a steady stream of income, whether it be business support to help them grow their business, or a workspace from which they can collaborate with other entrepreneurs.

Manufacturing is a sector that is experiencing significant change in the borough – with the growth of maker spaces and small scale manufacturing operations. Overall the sector has remained relatively static, but its composition is changing – with the growth of both food & drink, creative manufacturing and clothing since 2013.

Haringey has a **diverse range of businesses**, however the business survey suggests that nearly two-thirds of

businesses have been in their current locations for more than five years. Although the resilience of businesses is positive for the borough, there is a need to ensure they are **prepared for future challenges and are able to embrace modern ways of working** (e.g. automation and digitalisation).

Current awareness of opportunities generated through the public sector (e.g. procurement opportunities) is currently low. More should be done to **publicise such opportunities to local businesses**. Awareness of the business support opportunities available is also important, particularly if the borough is to support the growth of its economy and create opportunities for local people.



## Industrial Sites

Haringey's industrial land provides an **important source of employment for the borough's residents**. Evidence from the Tottenham Creative Enterprise Zone shows there is a unique blend of making and small-scale manufacturing activity, which requires industrial space to support its growth. The **availability, affordability and certainty of workspace for all businesses**, in particular those in industrial spaces, is fundamental for businesses to start placing down roots, enable investment and develop communities/networks.

Haringey has seen the **sixth largest decline in industrial floorspace** over the 2011-2016 period (out of 32 London boroughs) which has important repercussions for industrial jobs, especially in the warehousing and manufacturing sectors. This represents a London-wide trend, but has important implications for Haringey, particularly the potential to **maintain and grow a diverse employment base**.

Haringey's industrial sites are primarily located to the East of the borough, in parts of the borough which have particularly high levels of deprivation. **Establishing strong community links between businesses** in these locations and local residents will be beneficial in supporting local communities. Haringey's businesses already appear to invest well in training staff and taking on unemployed people, so this provides a useful platform

from which to reduce levels of deprivation towards the east of the borough.

Our business survey has identified **crime** as an issue for many businesses. Businesses also noted challenges relating to space (for redevelopment and staff parking) and public transport.

## Workspace & High Streets

### Workspace



There is a range of co-working and small business / start-up orientated space across the borough, but this is primarily focused on the creative sectors. Given employment trends, it may be appropriate for **future space to cater for a broader range of small and start-up businesses.**

Such spaces are primarily located to the south east of the borough which may **limit accessibility for many residents and businesses.**

Forecasts suggest growing demand for B1 (office) type space, with the trend analysis predictive future decline of light industrial and warehousing space. However research undertaken, particularly around some of Haringey's growth sectors (i.e. creative and digital sectors) suggests there is a need to secure spaces for creative activity, particularly those spaces which are able to **deliver affordable, secure and flexible workspace.**

### High Streets



High streets are **vital assets** within the borough, providing an 'experience' for local residents and visitors. They are important in setting **perceptions of the borough**, being places where visitors typically interact with local communities.

Haringey has a wide variety of high streets across the borough. Among the 8 largest, annual comparison spend is estimated to vary between £270 million (Wood Green) to £12 million (Seven Sisters).

Users generally have **positive perceptions of high streets**, with typical words being used to describe them including 'diverse', 'friendly' and 'local'. However, more could be done to make Haringey's high streets attractive places where people want to spend their time. Town centre users have concerns regarding crime and security, with cleanliness and the appearance of the high street also being issues. The range of uses on the high street were also identified, with some highlighting that there were not enough affordable supermarkets.



London

0207 336 6188  
london@regeneris.co.uk

Manchester

0161 234 9910  
manchester@regeneris.co.uk

[www.hatchregeneris.co.uk](http://www.hatchregeneris.co.uk)