

Haringey Employment Study - 2008 Update

FINAL REPORT

January 2009

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Contents

Section	Page
1. Introduction	7
1.1 Background	7
1.2 Structure of the Report	7
2. Policy Review	9
2.1 Introduction	9
3. Socio-Economic Appraisal	25
3.1 Introduction	25
3.2 Employment Structure	25
3.3 Population and Labour Market	34
3.4 Business Structure	35
3.5 Deprivation	40
3.6 Central Leaside Area	42
3.7 Key Messages	44
4. Employment Forecasts and Projections	47
4.1 Introduction	47
4.2 Sub-Regional Context: GLA Forecasts	47
4.3 Atkins Methodology	50
4.4 Atkins Projections	54
4.5 Summary of Outputs	58
5. Property Market Trends	59
5.1 Introduction	59
5.2 Marketing of B Use Class Properties	59
5.3 Changes in Demand Conditions	59
5.4 Lease or Purchase Arrangements	59
5.5 Popular Business Activity	59
5.6 Changes to Rents and Investment Yields	60
5.7 Changes to Vacancy Levels	60
5.8 Future Development of B Class Property	60
6. Business Consultations	61
6.1 Introduction	61
6.2 Methodology	61
6.3 Survey Sample	63
6.4 Summary of Business Survey Results	64
7. Supply Update	67
7.1 Introduction	67
7.2 Key Changes	67
7.3 Supply Review	68
7.4 Central Leaside Employment Land Supply	75
7.5 Haringey Heartlands and Tottenham Hale	76
8. Conclusions and Recommendations	77

8.1	Introduction	77
8.2	New Policy Context	77
8.3	Economic Context	78
8.4	Future Employment & Property Needs	79
8.5	Supply Update	80
8.6	Demand Supply Balance	80
8.7	Central Leaside	81

List of Tables

Table 2.1	Criteria for assessing the need for retention or release of sites	13
Table 2.2	UDP Strategic Designations in Haringey: Strategic Employment Locations, Opportunity Areas, Areas for Intensification and Metropolitan Centres.	20
Table 3.1	Workplace Employment in Haringey 1996-2006	26
Table 3.2	Employment Growth Rates 1996-2006 (Annual average % p.a.)	26
Table 3.3	2 Digit SIC Employment in Haringey (Data where available)	28
Table 3.4	Estimates of B Use Class Employment in Haringey (1996-2006)	33
Table 3.5	Economic Activity rates (1996-2007)	34
Table 3.6	Unemployment rates (1996-2007)	34
Table 3.7	Median Gross Weekly Wage Levels 1998-2007 (workplace)	34
Table 3.8	Annual Average Wage Growth 1998-2007(Workplace)	35
Table 3.9	Haringey Qualifications Profile	35
Table 3.10	Business Establishments in Haringey 1996-2006	36
Table 3.11	Business Unit Location Quotients 1996-2006	37
Table 3.12	Business units by employment size band in Haringey	38
Table 3.13	Size band quotients of business units (Haringey: London)	38
Table 3.14	Business Units, Annual Average Growth Rates (2002 – 2006)	38
Table 3.15	VAT Registrations in Haringey (1996 – 2006)	39
Table 3.16	VAT De-Registrations in Haringey (1996-2006)	39
Table 3.17	Net Change in VAT Registrations in Haringey (1996-2006)	40
Table 3.18	Broad Sector Employment and Business Establishments in Central Leaside Area 2006	42
Table 3.19	B-Use Employment and Business Establishments in Central Leaside Area 2006	43
Table 3.20	Business Structure in Central Leaside Area 2006	43
Table 4.1	GLA Employment Projections for the London Borough of Haringey	49
Table 4.2	Scenario 1 Broad Sector and B-use Sector Trends	52
Table 4.3	Atkins Employment Projections for the London Borough of Haringey	55
Table 4.4	Additional Employment and Associated Employment Floorspace and Land Requirements for London Borough of Haringey	57
Table 6.1	Survey Sample Central Leaside Zone	63
Table 6.2	Survey Sample Rest of Haringey	63
Table 6.3	Total Expansion Requirements	65
Table 7.1	DEA (UDP 2006) Employment Land Supply	69
Table 7.2	B Use Class Floorspace (SQM) by Sub Area 2007	70
Table 7.3	DEA Vacant Land Estimates	71
Table 7.4	Summary of Site Status (Other Employment Sites / Non DEA or Town Centre)	74
Table 7.5	Summary Use Class (Other Employment Sites / Non DEA or Town Centre)	74
Table 7.6	Assessment of Potential – Vacant & Derelict Sites	74
Table 7.7	Employment Land Supply in Central Leaside (LBH)	75

List of Figures

Figure 3-1	Haringey Total Employment 1991-2006	27
Figure 3-2	Haringey: London Location Quotients and Sectoral	29

Figure 3-3 – Haringey:GB Location Quotients and Sectoral	30
Figure 3-4 - Location Quotients for Selected Sub-Sectors (Haringey v London 2006)	30
Figure 3-5 - Expanding Sectors in Haringey 1996-2006 (change in employee numbers)	31
Figure 3-6 – Declining Sectors in Haringey 1996-2006 (change in employee numbers)	31
Figure 3-7 – Index of Multiple Deprivation in Haringey by Super Output Area (2007)	41

Appendices

A – Definition of B Use Class Activities by Standard Industrial Classification

B – Business Survey Findings.

1. Introduction

1.1 Background

Atkins was appointed by London Borough of Haringey in March 2008 to update the 2004 Employment Study¹ in order to provide a review of the provision of and demand for employment land and premises in the Borough for the period up to 2026.

Haringey Unitary Development Plan (UDP) was adopted in July 2006 and the policies are 'saved' for a period of three years. The Council is seeking approval to continue use of the UDP policies until the adoption of the Core Strategy and associated Local Development Documents (LDDs) which will be incorporated into the Haringey Local Development Framework (LDF). Therefore, revisiting and updating the 2004 employment study for the Borough is required to ensure that the emerging Core Strategy and associated LDDs are based on an up to date and robust evidence base up to 2026.

As part of the LDF process, LB Haringey is working with LB Enfield to develop a cross-boundary Area Action Plan for Central Leaside which will provide the framework for regenerating this important industrial area which is located either side of the North Circular Road.

Since the publication of the 2004 study, a number of critical contextual issues have emerged which reinforce the need for the study to be updated. These include:

- ODPM Guidance Note to Local Authorities on Employment Land Reviews (December 2004).
- Publication of Draft PPS4: Planning and Sustainable Economic Development (December 2007).
- Issuing of the Mayor's Supplementary Planning Guidance on Industrial Capacity (2008).
- GLA reports including the London Industrial Land Release Benchmarks Study (April 2007).
- The London Plan (Consolidated with Alterations since 2004).
- London Office Policy Review (2006).
- Sub-Regional Development Framework for North London (2006).
- Issues and Options Consultation Paper for Central Leaside.
- Key Supplementary Planning Documents affecting DEAs.

This report represents an update to, rather than replacement of, the 2004 study. Consequently, the findings set out in this report should be interpreted within the context of the earlier study and considered as supplementary advice. However, the conclusions and recommendations set out in this report provide the up-to-date position in relation to our policy advice.

1.2 Structure of the Report

This report is structured as follows:

- Section 2 updates the strategic policy position in relation to employment issues in Haringey and London.
- Section 3 provides a comprehensive analysis of socio-economic conditions in Haringey.

¹ *Haringey Employment Study, Atkins November 2004.*

- Section 4 sets out our employment and employment floorspace projections for the Borough and includes a qualitative assessment of current property market factors.
- Section 5 provides highlights of recent property market trends and prospects for Haringey.
- Section 6 summaries the findings of consultations with existing businesses in the Borough.
- Section 7 provides an update on key supply-side factors noting significant land-use changes that occurred at the Borough's employment sites since 2004.
- Section 8 describes our conclusions and an update of policy recommendations to inform the emerging LDF.

2. Policy Review

2.1 Introduction

This Section provides an update of the strategic policy context which will influence the development of employment policies in the forthcoming Haringey LDF. Particular consideration is given to recent policy guidance issued at the national and regional levels. The implications of these policy developments are summarised at the end of the Section.

2.1.1 Consultation Draft PPS4 : Planning for Sustainable Economic Development (December 2007)

The draft PPS identifies planning as key to contributing towards improving productivity and the UK's long term economic performance. Planning influences the drivers of productivity and facilitates employment growth, however if it is not responsive to market signals it can also represent a barrier to employment and productivity growth. By providing certainty of land use the planning system can encourage investment commitments, in addition well planned infrastructure can improve productivity and create environments in which people want to live and work.

The draft PPS highlights that local planning authorities should plan to encourage economic growth. In seeking planning that positively encourages economic growth the PPS highlights five key objectives:

- Providing a good range of sites identified for economic development and mixed use development.
- Ensuring a good supply of land and buildings offering a range of opportunities for creating new jobs in large and small businesses.
- Focus on high quality development.
- Avoidance of adverse environmental impacts.
- Shaping travel demand by promoting sustainable travel choices.

The PPS sets out national planning policies which describe how local planning authorities should plan for economic development. These policies are as follows:

- Local planning authorities should plan positively and proactively to encourage economic development in line with principles of sustainable development. Policies should be flexible, in order to respond to economic change.
- Local planning authorities should use a wide evidence base to understand both existing business needs and likely changes in the market.
- Local planning authorities should plan for and facilitate a supply of land which will be able to cater for differing needs of business and employment needs of the whole community, but this should be flexible enough to respond to changing needs. Designating sites for single or restricted use should be avoided.
- Local planning authorities should seek most efficient use of land and buildings.
- Local Planning authorities should seek to ensure economic development is high quality and inclusive design. Design should also ensure development addresses climate change.

2.1.2 Employment Land Reviews: Guidance Notes (ODPM, 2004)

In December 2004, the ODPM issued a guide for planning authorities with respect to assessing the demand for and supply of land for employment ("Employment Land Reviews: Guidance Notes"). The guide is particularly aimed at helping authorities assess the suitability of sites for employment development, safeguard the best sites in the face of competition from other higher

value uses and help identify those which are no longer suitable for employment development which should be made available for other uses.

The guide identifies a three stage process in undertaking employment land reviews. The three stages are:

- Stage 1 – Taking stock of the existing situation;
- Stage 2 – Creating a picture of future requirements; and
- Stage 3 – Identifying a “new” portfolio of sites.

2.1.3 London Plan (Consolidated with Alterations since 2004)

The London Plan initially produced by the Mayor in 2004, has been subject to a tightly focused review which took account of the mayor’s statutory duty to monitor the plan, new Government guidance, emerging regional guidance, new data, the need to roll the plan forward to 2025/26 and changes to the planning system. As a result of the review the Mayor issued Draft Further Alterations to the London Plan in September 2006. These were considered at an Examination in Public during the summer 2007 with the Panel’s report issued in October 2007. Taking on board the Panel’s findings, the Mayor issued the London Plan (Consolidated with Alterations since 2004) in February 2008.

The Plan introduced a new Policy 2A.3 on London’s Sub-Regions: this policy identifies the sub regional structure in Map 5A.1 and highlights that this will form the basis for sub-regional planning policy and delivery. The sub-regional structure has been changed to reflect London’s radial nature, although Haringey is now in the ‘North’ sub region.

Policies within Chapter 5 set out the role of the sub-regions. The sub-regions are described as having boundaries that are permeable and include North, North East, South East, South West and West London. The Mayor will, in partnership with stakeholders in each of these sub-regions, coordinate the delivery of the Plan’s policies and proposals at a sub-regional level. The Mayor published Sub-Regional Development Frameworks for each of the London Plan (2004) sub regions.

Indicative estimates of growth in population, households and employment are set out in Table 5A.1 of the Plan. For the north sub-region, employment growth is estimated at 300,000 jobs over the period 2006-2026, representing an annual growth of 15,000 jobs. This is the largest amount of growth of all London sub-regions. The Plan indicates that the Mayor will work with the Boroughs to accommodate this growth, in order that it will contribute to improving the quality of life and the environment, address issues of climate change, health and inequality and promote regeneration and sustainable development.

Policy 5B.1 identifies the strategic priorities for North London: those of particular relevance to employment land in Haringey include the following;

- Optimise the development of opportunity areas and areas of intensification.
- Manage the reuse of surplus industrial land taking into account waste management requirements.
- Deliver the London element of the government’s priority for the London-Stansted-Cambridge-Peterborough corridor for development, regeneration and transport improvement, while recognising the links with other parts of the corridor.

The Plan describes the North-London sub-region as stretching from the Central Activities Zone (CAZ) to the northern fringe of London with an exceptionally varied set of strongly defined communities. Economic performance is described as having been varied with some very strong employment growth in the CAZ and its fringe, but with other areas of continuing deprivation and slow growth/declining employment, including parts of the Upper Lee Valley and industrial areas around the North Circular Road.

The release of surplus industrial land to other uses will need to be rigorously managed particularly in areas that can accommodate this release including Opportunity Areas (Map 2A.1) to the east in

the Lower Lee Valley including Tottenham Hale and to the west at Brent Cross/Cricklewood and Colindale. Haringey Heartlands, including the Metropolitan centre of Wood Green, and Arsenal Holloway lie in the centre. SMEs are an important element in the sub-regional economy and the plan highlights that their needs should be supported.

Areas of Intensification in North London are identified in Map 2A.1 (Policy 2A.6). Haringey Heartlands/Wood Green is one such area that is of relevance which benefits from a planning framework designed to coordinate the range of development opportunities on the railway and industrial lands to the South-West of Wood Green town centre.

In terms of Strategic Industrial Locations in North London it is established that North London contains 20% of London's industrial land with seven SILs. The Plan states that in managing the stock of industrial land, account should be taken of the need to make provision for transport land and land for waste management facilities in line with the principle of self-sufficiency and taking account of some of the CAZ's needs.

2.1.4 Industrial Capacity – Supplementary Planning Guidance (March 2008)

The Industrial Capacity SPG provides guidance on the implementation of policies relating to industrial capacity in the London Plan (Consolidated with Alterations). The SPG focuses on the implementation of Policies 2A.7 and 3B.5 of the London Plan to manage, promote and where appropriate protect Strategic Industrial Locations (SIL), London's strategic reservoir of industrial development capacity.

The SPG provides guidance to:

- Ensure that there is adequate stock of industrial capacity to meet future needs and requirements; and
- Plan, monitor and manage the release of surplus industrial land so that it can better contribute to meeting strategic and local objectives, in particular housing provision.

Section 3 of the SPG identifies the plan, monitor and manage approach to surplus industrial land, with the aim of reconciling the relationship between supply and demand during 2006-2026. The SPG sets out that, over the period 2006-2026, when the net reduction in industrial land demand and management of vacancy rates is considered, there is scope for the release of around 814 hectares of industrial land, with 48ha per annum for the period 2006-16 and 33ha per annum for 2016-26.

Most of the release is expected to be in the North East (366ha) and South East (146ha) sub-regions. Levels of release for the north sub-region (including Haringey) will be 187ha released over the period. To assist Boroughs in planning for land use changes, each borough is classified into one of three groupings: managed transfer; restricted transfer; and limited transfer. Groupings were updated in 2007 in the light of recent research, taking into account issues such as: stock; vacancy; rental values and demand for other transport functions and wholesale markets.

Haringey is classified as limited transfer of industrial sites. This means that in developing site specific allocations and policies for the retention and release of land Haringey should take account of this classification. Boroughs in this category are seen as being intermediate between managed and restricted categories. Taking account of local variations of demand boroughs are encouraged to manage and where possible, reconfigure their portfolios of industrial land, safeguarding the best quality sites and phasing the release of industrial land in their DPDs in particular for waste management and logistics uses.

The SPG highlights the importance of accurate monitoring of supply and demand, particularly monitoring the actual release of industrial land against the monitoring benchmarks in the London Plan and the phasing and geographical spread of release identified in the SPG. Monitoring against benchmarks locally and strategically requires a robust understanding of both supply and demand particularly outside SILs where most change is expected to take place.

The London Plan (Consolidated with Alterations since 2004) identifies two broad categories of SIL, Preferred Industrial Locations (PILs) and Industrial Business Parks (IBPs). Within Haringey

35% of all Industrial land is classed as a SIL (Tottenham Hale and part of Wood Green – both of which are Industrial Business Parks which accommodate businesses requiring a high quality environment).

Boroughs are encouraged to designate Locally Significant Industrial Sites (LSIS). These are sites which are outside SILs but which local assessments indicate that protection is warranted because of their particular importance for local industrial type functions. Boroughs are asked to make explicit what types of uses are accepted in LSIS and distinguish these from broader based Defined Employment Areas (DEA).

The SPG also highlights that although strategic policy shouldn't cover other individual small sites, such sites can cumulatively have a strategic importance in meeting industrial needs and other needs (where surplus to demand). A co-ordinated approach to managing their future is therefore required. Boroughs should develop policies to manage release in doing so they should take account of local assessment and the criteria in Table 2.1 below.

Criteria for justifying the retention or release of sites in industrial use are split into general economic criteria, land use criteria and demand criteria. The aim is that boroughs seek to retain sites that are functionally most important for industrial users. The criteria should be used in conjunction with the broad guidance in the SPG on release of land that it identifies for each borough. In Haringey's case this is the guidance on limited transfer.

Table 2.1 – Criteria for assessing the need for retention or release of sites

<p>Economic Criteria</p>	<ul style="list-style-type: none"> ● Meets demonstrable local short term demand for industrial development, and / or strategic long term demand ● Offers potential for the in-situ expansion of existing industrial business ● Supports local or strategically important clusters of industry ● Meets demand and addresses particular needs of waste management, recycling, energy, transport and utilities and enabling waste to be managed in one of the nearest appropriate installations. ● Meets demand for new or emerging industries ● Is well located to take advantage of existing or proposed infrastructure or economic development / regeneration funding. ● Offers potential for the provision of small industrial units serving local residential and commercial areas, particularly where there is little alternative provision in the local area. ● Is needed to accommodate provision for transport in terms of Mayoral guidance on provision for transport and safeguarding river related uses ● Provides lower cost industrial accommodation suitable for small, start up, or lower-value industrial related businesses important to the local economy.
<p>Land Use Criteria</p>	<ul style="list-style-type: none"> ● Well located in relation to the strategic highway network or local highway network, in particular causing minimal traffic impact in residential areas ● Well located in relation to rail, river or canal network including inter-modal rail heads and safeguarded wharves, offering potential for transport of goods ● Located within or adjacent to a town centre or the CAZ, recognising PPS6 and PPG13 promote high trip generating uses at such locations ● Well located in relation to public transport facilities, recognising that many industrial activities have relatively low trip generation and that other land uses (such as office, leisure and retail) may be more appropriate in locations with high public transport accessibility ● Is part of a larger existing industrial activity, or area designated for industrial protection, where re-designation of the industrial site would alter the industrial character of the area or inhibit the operations of nearby industry ● Offers potential for 24 hour working, or offers facilities for 'bad neighbour uses' without detriment to residential amenity ● Offers potential for waste management or recycling ● Offers potential for space intensive activities which don't fall within the ambit of this SPG and would not, in this location compromise wider planning objectives ● Provides sufficient space for adequate operational parking and turning space for goods vehicles
<p>Demand Criteria</p>	<ul style="list-style-type: none"> ● The site has been adequately marketed through a commercial agent at a price that reflects market value for industrial use for a reasonable period (normally at least 2 years) and with potential for industrial redevelopment where this is required to meet the needs of industrial uses ● The site has been vacant for a considerable period (normally at least 2 years up to 5 years in areas of generally strong demand) without realistic prospect of industrial re-use

Guidance on the logistics and warehousing markets identifies that there is a need for an efficient logistics system and supporting infrastructure to enable distribution of goods to, from and within London in order to sustain economic growth. Most additional demand for logistics space is anticipated to be in the North East, South East and West Sub Regions.

Policy SPG 5 provides guidance on logistics and warehousing. In implementing London Plan policy, boroughs should take account of the market areas identified in the SPG and also accommodate smaller scale logistics, warehouse, and storage facilities within the SILs and LSIS in line with strategic road capacity. Provision on industrial sites outside SILs shouldn't compromise the local environment, access or road capacity or broader concerns to secure intensification at appropriate locations.

Guidance on mixed use re-development of industrial areas is provided in section 8 of the SPG. London Plan policy 3B.5 underlines that the prime purpose of SILs and LSIS framework as is to ensure an adequate stock of industrial capacity. Redevelopment for higher density mixed uses through consolidation of SILs or LSIS must not compromise their offer as the main strategic reservoir of industrial capacity. Inappropriate development can compromise the offer of sites as competitive locations for industry, transport, logistics, utilities or waste management, particularly in areas where industrial capacity is in short supply. Mixed use should therefore only be supported where the objectives of the London Plan policies are supported.

In planning for industrial land, boroughs should have regard to the potential for surplus industrial land (as defined in assessments) to help meet strategic and local requirements for a mix of other uses such as housing and social infrastructure, and where appropriate, contribute to town centre renewal. It is anticipated that most industrial land that will be identified as surplus will be in smaller sites outside SILs and LSIS.

The SPG sets out that mixed use should be focused near to public transport nodes or town centres. Good public transport is an essential pre-requisite for intensification and mixed use.

The SPG identifies the types of use that would be suitable on mixed use developments, housing, including affordable housing are the key priorities. Leisure, retail, social infrastructure and other town centre uses will be appropriate if mixed use development can be integrated with broader proposals for town centre renewal. However other than to provide small scale, local convenience services, retail and leisure uses will not be appropriate outside town centres.

In implementing London Plan policies 2A.7 and 35.B SPG 8 provides further guidance for boroughs, stating that they should:

- Consider through local assessment, whether industrial areas with good public transport accessibility, especially those within or on the edge of town centres would be appropriate for industry led, higher density, mixed use re-development. The redevelopment should not lead to significant net loss of industrial capacity, or compromise the offer of the wider area as an industrial location.
- Focus consolidation through this process on the periphery of SILs especially where there is a barrier separating the area from the rest of the SIL.

The need to provide a range of workspaces of different types, sizes and costs to meet requirements of different sectors of the economy is recognised in London Plan Policy 3B.1. Adequate provision of a range of types of premises is particularly important for entry, survival and expansion of SMEs. Policy SPG10 seeks to protect viable industrial sites that can accommodate small industrial units suitable for start ups and SMEs.

2.1.5 London Industrial Land Release Benchmarks (April 2007)

This study is one of six commissioned by the GLA in 2006, to consider industrial land across London: It is the central study that draws together the different strands of research and provides recommendations for the protection, or release, of industrial land across London.

The study had four objectives:

- Update indicators and objectives for demand for industrial land in light of new employment projections and recent GLA research;
- Update supply side estimates based on new information on total stock, trends in provision and changes of use;
- Provide quantitative sub regional indicators on future release and retention of industrial land; and
- Provide advice or qualitative indicators for management of industrial land for all London boroughs

Baseline data on the existing stock of industrial land within the study area is from various sources, including existing borough employment land reviews. For the North Sub region in 2001 there were

329 ha of built on land for industry, and 410 ha of built on land for warehousing a total of 738 ha. By 2006 this declined to 667 ha in total. The North sub region was the only sub region to decline in warehousing whilst London as a whole increased. Haringey had a total of 120 ha in 2001 with industry accounting for 50 ha while warehousing accounted for 70 ha. This figure had declined by 2006 to 109 ha, with industry accounting for 44 ha while warehousing accounted for 65 ha.

The study identifies vacant industrial land for 2001 and 2006. London as a whole has seen a reduction on vacant industrial land of 185 ha over the period 2001-2006. In North London, the amount of vacant land reduced by 32ha from 139ha to 107ha, In Haringey, the amount of recorded vacant land decreased slightly from 12ha to 11ha.

In terms of demand the report uses projected changes in 'general industrial' or 'manufacturing' activities with employment densities to project change in demand for land required by general industry. Employment in this sector is projected to decline overall in London resulting in a release of 934 ha (2006-2026).

Although traditional uses of industrial land are projected to decline, there are growth sectors. During the period 2006-2026, logistics will require a further 461ha of land, and waste and recycling facilities will require 251 ha. There will also be a need for a further 12 additional bus depots throughout London (12 ha). In addition to the decline in general industrial and manufacturing, there is a planned restructuring of wholesale markets which would require the release of 8ha of land.

For the North London sub-region, the study projects a net loss of 188ha.

Demand will impact on sub-regions in different ways with surplus supply in some areas and supply constraints in others. The study therefore reviews the characteristics of the different property markets within London. Six property markets have been identified including the Lee Valley market area within which a significant proportion of Haringey lies.

The Lee Valley market area is described as having a logistics focus serving North London/M25 and the City while the total stock of industrial floorspace is described as having reduced over the past decade, albeit recovering in more recent years.

The study identifies key findings for the Lee Valley market area: The proportion of demand from logistics/warehousing is 80% +; demand for units of less than 2000sqm floorspace is 'Weak/Steady', for units of between 2,000 and 10,000 sqm demand is 'Strong' and for units over 10,000 sqm demand is 'Steady/Strong'; typical prime rents are £80-£160 per sqm.

2.1.6 Sub-Regional Development Framework: North London (2006)

The Sub-Regional Development Framework (SRDF) covers the North London sub-region, which is made up of the boroughs of Barnet, Enfield, Haringey and Waltham Forest. This sub-region is considered to have strong interactions with Central London and close links with both East and West London. North London also has a strong relationship with Hertfordshire and Essex especially as the London Stansted Cambridge Peterborough Corridor and the A1/M1 link along major transport arteries.

The SRDF provides non-statutory guidance on the implementation of London Plan policies in light of sub-regional circumstances as indicated in London Plan Policy 5A.1 and paragraph 5.5.

The study has two parts. Part One sets out the overall direction for the sub-region while Part Two looks at implementation, in particular quantifying the various impacts of growth that is projected to take place in the sub-region, proposing how it can be accommodated in the right place, at the right time and in a sustainable way.

Part One

The SRDF for North London highlights that in 2001, the sub-region had a population of 1,040,000 and provided 386,000 jobs. It is considered that North London, in common with other parts of London, will experience long-term growth in population, homes and jobs. By 2016, the population is expected to grow by nearly 160,000, or 15% creating the need for new housing, jobs and a

variety of new and improved services and infrastructure such as schools, community and health facilities, transport, utilities and retailing. The SRDF describes the task at hand as managing growth so that it goes to places and takes the forms that will revitalise areas of deprivation, raise the overall quality of life and environment and produce the most sustainable outcomes.

The North London Strategic Alliance (NLSA) promote the particular economic strengths and identity of the sub-region which has a broad spread of economic activities. The report highlights that it is essential for the sub-region to exploit the potential of nearby sources of job growth as well as fostering its own economic strengths, requiring two improvements above all:

- **Firstly**; to act as a hub between growth areas and to access employment in them, this requires improvements in strategic transport infrastructure; and
- **Secondly**; the resident workers in North London will need the skills and support systems, such as affordable childcare, that will allow them to compete for work. The NLSA give high priority to education and skills development.

As previously highlighted the report identifies substantial residential and employment growth as providing an opportunity to strengthen the sub-region's spatial structure and stimulating areas in need of regeneration. The London Plan provides a well balanced approach with the Haringey Heartlands Area of intensification in the centre of the sub-region and the Opportunity Area of Tottenham Hale to the East .

The SRDF for North London identifies the required 'action' for the overall direction of the sub-area as being:

- The Mayor, NLSA and other stakeholders should ensure regular liaison with Stakeholders in the East and South East regions where there are shared interests in relation to North London.
- Key stakeholders should work together to deliver targets, commitments and investment that the SRDF identifies as being necessary to ensure that North London develops sustainably.

Part Two

To successfully implement the London Plan at the sub-regional level and to promote the direction for North London set out in Part One, a series of issues and related actions are addressed in the report, and summarised as:

- Quantifying all the elements of growth needed to develop sustainable communities.
- Allocating the growth spatially.
- Ensuring the resultant development brings benefit to communities.
- Ensuring the development improves the environment.
- Managing the development tools and processes.

The overall conclusions for North London of relevance to this study include:

- **Employment and offices:** The report indicates that demand for additional employment can be accommodated. The real challenge is identified as attracting employers to come to North London. A further challenge is outlined as encouraging more mixed use developments. The NLSA identified a need for premises that would allow Small and Medium Sized Enterprises to grow, and in particular a need to foster such businesses within the Black and Minority Ethnic communities (BME) sector.
- **Industry and warehousing:** The report states there is some scope for the release of industrial land. But this will need careful management to ensure a continued supply of land to meet London's needs as a whole. The sub-region has strong demand in relation to warehousing and distribution uses and ways of intensifying such land uses should be explored in relevant locations.

Part Two, Section Two focuses on allocating growth across North London relating to the identified growth requirements for a number of issues, including those discussed above. Growth requirements identified in the study for the period 2001-2016 amounts to an additional 26,000 jobs. However, for industry and warehousing it is estimated there will be a reduction of 100 hectares 2001-2016, equating to a fall of 5 hectares per annum (2005-2016) including an allowance for the provision of additional recycling/waste management facilities.

The study identifies the main locations for growth based upon a core principle in allocating growth which will be to optimise the relationship between the intensity of development and the existing and potential capacity of the public transport system, these include:

- **Town Centres:** The Metropolitan centre of Wood Green is acknowledged as responding positively to changing consumer demands although this is not the case for all other town centres in the sub-region. The strategy highlights that some other Major and District town centres in the sub-region have potential for mixed-use development as well as retail expansion.
- **Opportunity Areas/Areas for Intensification:** including Brent Cross/Cricklewood which is planned to evolve into a balanced town centre, together with those at Tottenham Hale, the Upper Lee Valley and a small part of the Lower Lee Valley, and the Intensification Areas of Colindale, Haringey Heartlands and Mill Hill East.
- **Industrial Locations:** including Strategic Employment Locations as well as some Locally Significant Employment Sites.
- **Transport and accessibility:** including areas that will benefit from improved access.

2.1.7 London Office Policy Review 2006

The purpose of the London Office Policy Review (LOPR) is to provide policy makers with the most up to date information on the supply and demand for offices in London. LOPR 2006 provided the latest office market data and policy analysis for the review of the London Plan.

Empirical evidence suggests that on average London offices are occupied at 16.3 sq metres (175 sq ft) net lettable per employee. This average coefficient has remained unchanged for at least twenty years. The LOPR pointedly states that this figure conceals very wide variations mainly by business sector, office function and to a lesser extent by other factors such as age of building and location.

The study addresses density, a key consideration by adopting a preferred scenario where the occupational density of the existing stock remains unchanged but the density of occupational stock increases gradually over time (Scenario 2), The LOPR estimates that between 2006 and 2026 London will require 7.67 million sq meters (82.6 million sq ft) net lettable additional stock if the accommodation needs of 510,000 extra office workers are to be met.

The North sub-region is identified as having one of the greatest needs for additional floor space, arising from the geographical allocation of growth. At Borough level the big 'Six' are (in descending order) Tower Hamlets, Westminster, the City, Camden, Southwark and Islington, which between them account for 56% of potential office employment growth. Demand growth in Haringey is expected to be relatively modest with the need for additional office space at approximately 70,000 sqm (739,364 sq ft) for the period 2006-2026.

2.1.8 Central Leaside Joint Area Action Plan: Central Leaside AAP – Issues and Options Report (2008)

The London Boroughs of Enfield and Haringey are jointly working on the Central Leaside Area Action Plan (CLAAP). Central Leaside is the name applied to the Strategic Employment Location that lies on the border between the London Boroughs of Enfield and Haringey and is dissected by the North Circular. Parts of Central Leaside are identified as Strategic Industrial Land in the London Plan (2008).

The primary purpose of the CLAAP is to evaluate the characteristics of, and pressures facing, the Central Leaside business area and develop a planning framework for future development and regeneration. In spatial terms the Area Action Plan (AAP) includes parts of Northumberland Park Ward covering the Brantwood, Marsh Lane, North East Tottenham and Willoughby Lane employment areas in Haringey.

Central Leaside is described in the report as being well placed in relation to strategic growth areas and transport links particularly the North Circular Road. The area is seen as being an important employment location with much of the industrial base geared towards storage and distribution, service industries, automotive supply and repair and some manufacturing. These operations are described as typically operating out of large sheds or other industrial estate premises while the London Plan regards Central Leaside as a location for industry that is not environmentally sensitive.

The AAP provides an opportunity to take a comprehensive strategic view of the employment land and look at new ways of generating employment alongside other uses. Central Leaside could accommodate new activities in line with the economy of London and the Southeast which is shifting towards more knowledge-based, service sector and high technology activities. The report states that given the area's location in the growth corridor, its socio-economic context, and the changing nature of industry, the existing situation cannot simply be maintained without any investment or improvement. Three options are posed for the future of Central Leaside:

- Reinforcing the existing employment function;
- Taking a pro-active approach to upgrading employment activities (to accommodate higher value businesses) and developing niche sectors; or
- Transforming the area through intensification and mixed-use which would introduce non-employment uses alongside higher value employment activities.

2.1.9 North London Employment Land Study: Final Report (2006)

The North London Employment Land Study was undertaken to assess current usage (2006) and future need for employment land within the North London boroughs of Barnet, Enfield, Haringey and Waltham Forest in order to inform the ongoing economic, planning and development activities within these areas. The Report was commissioned by the LDA and the North London Strategic Alliance.

For each borough, the report identifies key trends in relation to the current market context and employment land supply and demand. It provides an overview appraisal of each of the main employment areas in each Borough. The following summarises the report's key findings for Haringey:

- **Current Market Context:** The report identifies Haringey as potentially having the oldest industrial/warehousing stock in the sub-region. Market activity indicated reasonable demand for small and medium sized industrial units in the Borough although it is expected such demand would wane as stock becomes more obsolete. There is little opportunity for speculative construction due to few opportunities for redevelopment on reasonably sized plots. The market was described as being restricted due to the lack of single large occupiers and the highly fragmented ownership of many sites. Haringey is not perceived as a key office location, mainly due to its proximity to the centre of London, with most demand originating from companies historically located in the area.
- **Employment Land Supply:** The report identified 25 employment clusters within Haringey containing a total of 715 individual employment sites: around 133 ha of employment land was identified accounting for 4.5% of total land within the Borough. Wholesale, warehousing and transport uses together account for the largest proportion (42% / 43 ha) of employment land in the Borough. Most of Haringey's employment land is located within 15 intermediate sized clusters (ranging from 2 to 15ha) accounting for 89% of Haringey's employment land (108

ha). Just over 0.9 million m² of employment floorspace was identified within the Borough. Most of the Borough's building stock was identified as either 'Good' or 'Reasonable'. A smaller proportion of buildings within the Borough are identified as 'Poor' or 'Very Poor' compared to North London as a whole.

- **Employment Land Demand:** The report indicates Haringey's net employment land demand is forecast to reduce during the periods; 2001-2016 (Mid-range -14 ha) and 2005-2016 (Mid-range -12 ha).

2.1.10 Haringey Unitary Development Plan (2006)

Haringey's UDP was adopted in 2006 and the policies were 'saved' for a period of three years. The Council is seeking approval to continue use of the UDP policies until the adoption of the Core Strategy and associated Local Development Documents (LDDs) which will be incorporated into the Haringey Local Development Framework (LDF). The UDP highlights that Haringey suffers from high levels of deprivation, particularly in the east of the Borough. The UDP states that the Borough's claimant unemployed as a percentage of the workforce in March 2002 was 9.1%, which was greater than the North London and Greater London rates of 5.6% and 3.6% respectively.

Strategy within the UDP relating to employment land is focused on Policy G4: Employment; 'Development should meet the needs of business and industry, and provide employment opportunities for local residents'. The following objectives relate to this policy :

- Objective 7: Ensure that a plan-monitor-manage approach is adopted for land and employment premises, and the creation of new ones is assisted where appropriate.
- Objective 8: Ensure that land and premises are capable of embracing modern work requirements.
- Objective 9: Seek to meet the needs of different sectors of the economy, especially SMEs and those organisations within the voluntary sector through provisions of a range of premises of different types, sizes and costs.

2.1.11 Haringey Council identified a hierarchy of defined employment areas (DEAs), where the concentration of certain employment types is recommended.

- DEA—Regeneration areas which are in Tottenham Hale (Opportunity area) and Wood Green/Haringey Heartlands (Area of Intensification)
- DEA –Industrial locations which area amongst the most established industrial areas in the Borough
- DEA- Employment Locations where employment generating uses wider than B uses may be located.

The Council will consider mixed use redevelopment of the Regeneration DEAs in accordance with policy AC1 (Wood Green/ Haringey Heartlands) and AC2 (Tottenham International).

Table 2.2 – UDP Strategic Designations in Haringey: Strategic Employment Locations, Opportunity Areas, Areas for Intensification and Metropolitan Centres.

Designation	Area/Site	Description
Strategic employment locations	Central Leaside Business Area (North East Tottenham DEA 13), Tottenham Hale & Wood Green	These form a London wide framework of sites for industry, business and warehousing.
Opportunity Area	Tottenham Hale (now referred to as Tottenham Urban Centre)	An area with the capacity to accommodate significant levels of new employment and housing.
Area for intensification	Haringey Heartlands/ Wood Green	An area where development can be intensified for mixed use, high density development.
Metropolitan Centre	Wood Green Metropolitan Centre	This metropolitan centre has been identified as having opportunities for retail growth.

(Haringey Unitary Development Plan: July 2006)

2.1.12 Supplementary Planning Documents

Since the publication of the 2004 Employment Study report, two supplementary planning documents (SPG and SPD) have been adopted by the Council:

- Haringey Heartlands Development Framework (April 2005); and
- Tottenham Hale Urban Centre Masterplan (October 2006).

Given the importance of these documents to the future of five key DEAs in Haringey, the implications of these documents are taken into consideration in assessing the future employment land supply and demand in Haringey.

Haringey Heartlands Development Framework

Located at the centre of the Borough, the Haringey Heartlands area adjoins Wood Green Town Centre and comprises tracts of underused utilities land some of which were identified as part of the 2004 Employment Land Study. The area is designated as an Area of Intensification in the London Plan and in the UDP.

In terms of UDP employment designations in this area, the primary area relates to DEA 19 (Wood Green) which broadly aligns with the Eastern Utilities Land identified in the SPG. In addition DEA 4 (Campsbourne) falls within the Western Utilities Lands although this is a relatively small area (0.55ha).

The SPG aims to bring a large area of brownfield and contaminated land into beneficial uses. This incorporates the reclamation of 2ha of vacant brownfield land and the intensification of at least 30ha of brownfield land through mixed-use development. Other key aims include the creation of a cultural and enterprise cluster generating significant new investment and employment in a deprived area. Approximately 1,500 net additional jobs could be provided in the area focusing on Small and Medium Sized enterprises and creative industries in affordable premises.

Tottenham Hale Urban Centre Masterplan

Designated as an Opportunity Area in the London Plan and the UDP, the area covers around 39ha which comprises a mixture of industrial and warehousing units as well a major gyratory road system and public sector interchange. Currently, relatively few people live in the area. The area covered by the SPD incorporates most of the land designated under three DEAs, namely: Millmead and Ashley Road Extension (DEA 11); Tottenham Hale (DEA 15); and Hale Wharf (DEA 7).

The SPD articulates a vision for the Tottenham Hale area which is to transform the area into an attractive, thriving, mixed-use urban centre including community, employment, commercial, leisure and residential uses.

These two areas contain Strategic Industrial Locations as defined in the London Plan (2008) which identifies two broad categories of SIL, Preferred Industrial Locations (PILs) and Industrial Business Parks (IBPs). Tottenham Hale and part of Haringey Heartlands are considered as IBPs which accommodate businesses requiring a high quality environment.

Key Messages

Following the appraisal of key strategic policy advancements since the publication of the 2004 report, the core messages for Haringey are summarised below.

- Draft PPS4 promotes a proactive and positive approach to planning for economic development. This includes making provision for a good range of sites (including mixed-use) for large and small businesses. In seeking to endanger a more responsive and flexible approach to the provision of employment land, the draft PPS highlights that designating sites for single or restricted use should be avoided.
- The London Plan (Consolidated with Alterations since 2004) revised the Plan's 2004 sub-regional planning framework. Indicative employment growth projections have been provided for the north sub-region, which amount to 300,000 additional jobs over the period 2006-2026 (15,000 per annum). Policy 5G.2 states that boroughs should reinforce the CAZ as a global business location and bring forward capacity through redevelopment in opportunity areas and areas of intensification.
- Priorities for the North London sub-region highlighted by the (revised) London Plan include: optimising the development of Opportunity Areas and Areas of Intensification (including Brent Cross / Cricklewood, Tottenham Hale, Upper & Lower(part) Valley, Colindale, Haringey Heartlands and Mill Hill East); managing the re-use of surplus industrial land; and delivering the London element of the London-Stansted-Cambridge-Peterborough Growth Corridor.
- The London Plan highlights the need for local authorities to ensure adequate provision is made for SMEs and that release of surplus industrial land should be rigorously managed.
- The Mayor's recently issued SPG on Industrial Capacity highlights that approximately 187 ha of surplus industrial land should be released to other uses in the period 2006-2026. Haringey is placed in the 'limited transfer' category which is the middle of the three transfer classifications. This classification aims to encourage local authorities (including Haringey) to manage, and where possible, reconfigure their portfolios of industrial land, safeguarding the best sites and phasing the release of industrial land to reduce vacancy rates towards the London-wide frictional rate of around 5%. Tottenham Hale and Wood Green (part) are allocated as SILS / Industrial Business Parks which can accommodate businesses requiring a high quality environment. Supplementary planning documents have been prepared for Haringey Heartlands and Tottenham Hale.
- Whilst the SPG highlights that SILs represent the core reservoir of industrial land in London, it also emphasises the need for local authorities to identify Locally Significant Industrial Sites (LSIS). Like the SILs, the LSIS should be protected for a range of industrial uses. Haringey should protect its SILs predominantly for employment use. Moreover, it will be important for the LDF to identify its portfolio of LSIS. The SPG sets out the criteria which should be applied by local authorities to identify LSISs.
- The SPG highlights that provision of mixed-use development in LSISs is not a primary aim. Whilst mixed-use may not be completely excluded in LSISs, such proposals must be supported by London Plan policies (e.g. in close proximity to public transport hubs and peripherally located and dysfunctional parts of industrial sites).
- In planning for the release of industrial land, the SPG highlights that most surplus land will be on smaller sites outside SILs and LSISs.
- The London Industrial Land Release Benchmarks study highlighted that industrial and warehousing land supply in Haringey decreased from 120ha in 2001 to 109ha in 2006: this decline comprised 6ha of industrial land and 5ha of warehousing land. In Haringey, a small decline took place from 12ha to 11ha. This compares well with the findings of the 2004 Employment Study for Haringey which measured vacant land at 10ha (in DEAs). Overall, the study projects the net release of 188ha in North London (Borough level estimates are not made available).

- Despite a projected fall in demand for general industrial and manufacturing activities, the Benchmarks report highlighted that demand in North London and Haringey will increase for logistics / warehousing, waste and recycling facilities and transport related functions.
- The North London Employment Land Study (NLELS) highlighted that Haringey is characterised by an ageing stock of industrial and warehousing premises. Despite this, the majority of premises in the Borough were classified as being in good or reasonable condition. With an estimated vacant land rate of 13%, the report projects that net demand for employment land in Haringey will be up to -14ha for the period 2001-2016.
- The Issues and Options report for the Central Leaside Joint Area Action Plan highlights the strategic importance of the area for employment (LB Enfield and LB Haringey). However, it emphasises that the dominance of manufacturing and warehousing activities in the area makes it vulnerable to employment decline. In the context of increasing demand for knowledge-based, service sector and high technology activities, the report emphasises the need for restructuring the offer of the area as a business location. Three options are posed for the future of Central Leaside:
 - Reinforcing the existing employment function;
 - Taking a pro-active approach to upgrading employment activities (to accommodate higher value businesses) and developing niche sectors; or
 - Transforming the area through intensification and mixed-use which would introduce non-employment uses alongside higher value employment activities.
 - Parts of Central Leaside fall within the designation of Strategic Industrial Land, and London Plan policies and the Mayor's SPG on Industrial Capacity will be a key consideration in developing the future options.

3. Socio-Economic Appraisal

3.1 Introduction

This section provides a profile of the socio-economic conditions in Haringey. Its main aim is to provide the economic context to employment land demand and supply factors in the Borough. This includes analyses of both total employment and employment related to businesses operating from B Use Class premises (see Appendix A).

The socio-economic appraisal provides an important context to understanding the key priorities and challenges in the local economy. In assessing the need and demand for employment land and premises in Haringey, the analysis should be considered in conjunction with the employment demand projections set out in Section 4.

The analysis contained in the 2004 Employment Study highlighted key issues and trends within Haringey based on data up to 2001. This Section provides an up-to-date assessment of socio-economic data made available since 2004. The aim is to highlight recent trends over the decade 1996-2006 which, combined with changing policy guidance as set out in Section 2, may influence the conclusions drawn previously.

3.2 Employment Structure

3.2.1 Broad Sector Analysis

Table 3.1 shows that in 2006 approximately 61,000 jobs existed in Haringey (excluding self-employment). This represents an increase of 13.4% since 1996. This is comparable to growth in Great Britain overall (13.8%) and slightly lower than the overall growth rate for London (14.1%) and reflected national economic trends with annual average growth of 1.3%.

It can also be seen from Table 3.1 that the Haringey economy is dominated by employment in three key broad sectors, namely:

- public administration, education and health;
- distribution, hotels and restaurants (including retail); and
- banking, finance and insurance.

Between 1996 and 2006 employment in 'other services' and, to a lesser extent, 'banking, finance and insurance' grew significantly. The annual average growth rate for Other Services employment was over two and a half times that for the sector in London as a whole and over twice that for Great Britain.

The 'banking, finance and insurance' sector grew at a similar rate to London for the same period, though this was lower than for Great Britain as a whole. Similarly, employment in distribution, hotels and restaurants experienced higher rates of growth in Haringey compared to those recorded for Greater London and GB.

Growth in the public administration, education and health sector was lower than for London and for Great Britain as a whole.

The construction sector has been growing nationally, however, within London and in Haringey it accounts for just 2.2% of employment, lower than the 4.8% GB average or the 2.9% London figure.

Manufacturing employment in Haringey continues to decline, with the sector now accounting for 7.5% of employment, lower than the national average of 10.9% but higher than the London average of 4.8%. The decline in this sector is more pronounced than in other regions. This may

indicate that restructuring within the Haringey economy is still levelling, and that diversification is underway. Consequently it will be important for the LDF to support this diversification and ensure the new jobs, in particular in growth sectors, are sustained. It also indicates the potential for obsolete industrial land to be considered for transfer to other uses.

Table 3.1 - Workplace Employment in Haringey 1996-2006

Broad Industrial Category	1996		2002		2006		Av Ann Growth 1996-2006
	Number	% of total	Number	% of total	Number	% of total	
Agriculture and fishing	62	0.1	44	0.1	44	0.1	-3.4
Energy and water	26	0.0	6	0.0	10	0.0	-9.1
Manufacturing	7,458	13.9	5,311	8.8	4,559	7.5	-4.8
Construction	1,806	3.4	2,597	4.3	2,237	3.7	2.2
Distribution, hotels and restaurants	13,578	25.2	16,846	27.9	15,940	26.1	1.6
Transport and communications	4,287	8.0	4,310	7.1	4,399	7.2	0.3
Banking, finance and insurance, etc	8,628	16.0	11,119	18.4	10,816	17.7	2.3
Public administration, education & health	14,169	26.3	15,186	25.1	17,034	27.9	1.9
Other services	3,767	7.0	5,005	8.3	5,965	9.8	4.7
Total	53,782	100	60,423	100	61,002	100	1.3

Source: NOMIS / Annual Business Inquiry (April 2008)

Table 3.2 - Employment Growth Rates 1996-2006 (Annual average % p.a.)

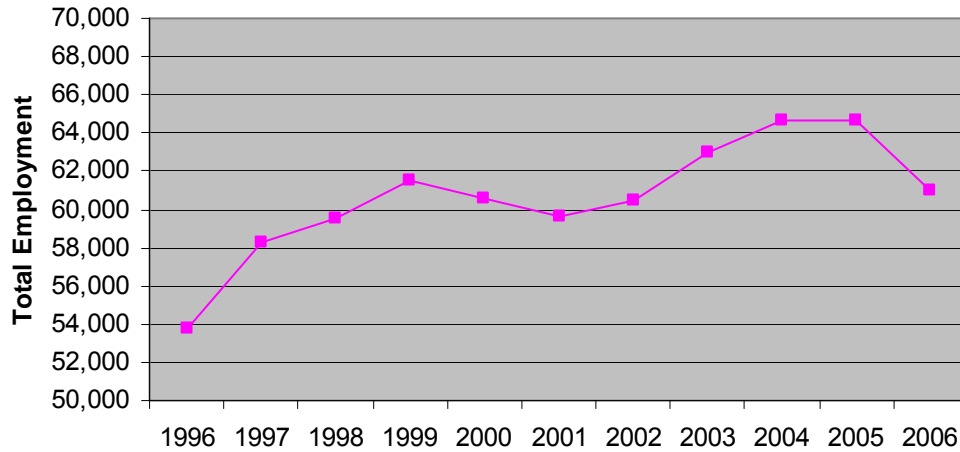
Broad Industrial Category	Haringey	London	Great Britain
1 : Agriculture and fishing	-3.4	-3.5	-2.4
2 : Energy and water	-9.1	-3.7	-3.6
3 : Manufacturing	-4.8	-3.9	-3.4
4 : Construction	2.2	2.2	3.7
5 : Distribution, hotels and restaurants	1.6	0.9	1.2
6 : Transport and communications	0.3	0.6	1.3
7 : Banking, finance and insurance, etc	2.3	2.2	3.2
8 : Public administration, education & health	1.9	2.1	2.3
9 : Other services	4.7	1.8	2.1
Total	1.3	1.3	1.3

Source: NOMIS / Annual Business Inquiry (April 2008)

Figure 3.1 illustrates the pattern of total employment change over the period 1996 to 2006. This highlights that after a period of steady growth during the late 1990s, Haringey's employment base declined marginally between 2000 and 2002 before continuing to grow. The decline in the early part of the decade may reflect a period of adjustment in European economies. The apparent decline from 2005-6, visible across all comparison areas, may be attributed to the change in date for data collection by ABI which has resulted in lower overall employment estimates when comparing 2005 and 2006 estimates².

² <https://www.nomisweb.co.uk/articles/news/files/ABI2006discontinuities.doc>.

Figure 3-1 –Haringey Total Employment 1991-2006



Source: ABI/NOMIS 2008

3.2.2 Detailed Sector Analysis

In understanding the dynamics of the local economy, it is useful to examine changes in employment by the 2-digit 'Standard Industrial Classification' code (SIC) (see Table 3.3 below³). The analysis presented below is aided by charts (Figures 3.2 to 3.4) which show:

- Expanding and declining industries between 1996 and 2006;
- Location quotients⁴ for selected industries in Haringey to demonstrate the extent to which they were over-represented or under-represented in employment relative to Greater London in 2006.

³ Table excludes data which cannot be disclosed to third parties according to compliance requirements set out by the Chancellor of the Exchequer Notice / 1947 Statistics of Trade Act.

⁴ Location Quotient of less than 100 indicate that employment in the sector is under-represented in Haringey compared to Greater London. A quotient greater than 100 indicates that employment in the sector is over-represented.

Table 3.3 - 2 Digit SIC Employment in Haringey (Data where available⁵)

Industrial Sector	1996		2002		2006		Change 96-06 (No.)	Change 96-06 (%)	% Ann. Growth 96-06
	No.	%	No.	%	No.	%			
Manufacturing of food and beverages	569	1.1	750	1.2	1,289	2.1	720	126.5	8.5
Manufacture of textiles	C	C	C	C	C	C	-86	-38.2	-4.7
Manufacture of wearing apparel; dressing and dyeing of fur	2,886	5.4	1,242	2.1	589	1.0	-2,297	-79.6	-14.7
Publishing, printing and reproduction of recorded media	653	1.2	743	1.2	725	1.2	72	11.0	1.1
Manuf. rubber and plastic products	C	C	C	C	C	C	-246	-35.3	-4.3
Manuf. other non-metallic mineral products	C	C	C	C	C	C	-111	-45.1	-5.8
Manuf. fabricated metal products, except machinery and equipment	322	0.6	354	0.6	225	0.4	-97	-30.1	-3.5
Manuf. machinery/ equipment nec*	C	C	C	C	C	C	-178	-53.9	-7.5
Manuf. transport equipment	C	C	C	C	C	C	269	13,450	63.4
Manuf. furniture; manufacturing nec*	460	0.9	390	0.6	233	0.4	-227	-49.3	-6.6
Construction	1,806	3.4	2,597	4.3	2,237	3.7	431	23.9	2.2
Sale, maintenance and repair of motor vehicles and motorcycles; retail sale of automotive fuel	910	1.7	990	1.6	752	1.2	-158	-17.4	-1.9
Wholesale trade and commission trade, except of motor vehicles/ motorcycles	3,555	6.6	4,064	6.7	3,704	6.1	149	4.2	0.4
Retail trade, except of motor vehicles and motorcycles; repair of personal and household goods	6,291	11.7	7,916	13.1	7,845	12.9	1,554	24.7	2.2
Hotels and restaurants	2,823	5.2	3,876	6.4	3,638	6.0	815	28.9	2.6
Land transport; transport via pipelines	2,477	4.6	2,776	4.6	3,108	5.1	631	25.5	2.3
Supporting and auxiliary transport activities; activities of travel agencies	364	0.7	599	1.0	605	1.0	241	66.2	5.2
Post and telecommunications	1,416	2.6	924	1.5	674	1.1	-742	-52.4	-7.2
Financial intermediation, except insurance and pension funding	943	1.8	639	1.1	629	1.0	-314	-33.3	-4.0
Activities auxiliary to financial intermediation	107	0.2	149	0.2	122	0.2	15	14.0	1.3
Real estate activities	907	1.7	1,439	2.4	1,850	3.0	943	104.0	7.4
Renting machinery/equipment, etc	134	0.2	103	0.2	159	0.3	25	18.7	1.7
Computer and related activities	439	0.8	968	1.6	799	1.3	360	82.0	6.2
Other business activities	5,975	11.1	7,802	12.9	7,237	11.9	1,262	21.1	1.9
Public administration and defence; compulsory social security	5,273	9.8	3,900	6.5	3,495	5.7	-1,778	-33.7	-4.0
Education	5,141	9.6	6,247	10.3	7,372	12.1	2,231	43.4	3.7
Health and social work	3,755	7.0	5,039	8.3	6,167	10.1	2,412	64.2	5.1
Activities of membership organisations not elsewhere classified	376	0.7	481	0.8	630	1.0	254	67.6	5.3
Recreational, sporting activities	2,459	4.6	3,368	5.6	3,978	6.5	1,519	61.8	4.9
Other service activities	720	1.3	737	1.2	889	1.5	169	23.5	2.1

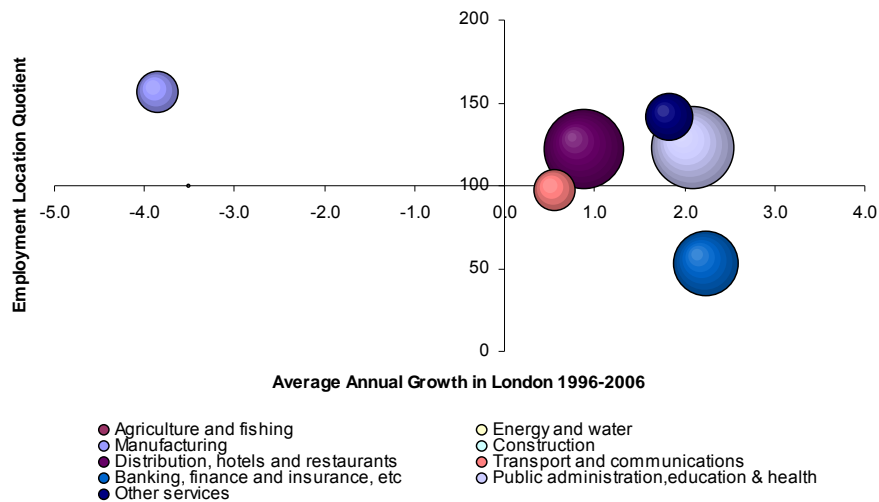
Source: NOMIS (April 2008). * nec = not elsewhere classified. C = confidential (see footnote 5)

⁵ Implementing the 1947 Statistics of Trade Act, NOMIS / ONS identifies data that is confidential and cannot be released to third parties. Such confidential data has been excluded from the table.

Figures 3.2 and 3.3 illustrate how Haringey’s existing employment structure is placed relative to growing and declining sectors in the Greater London and national economies between 1996 and 2006. For example, industries identified in the upper right quadrant are those which have experienced growth in the wider (London (Figure 3.2) or national (Figure 3.3) economy) and are well represented in Haringey.

Figure 3.4 highlights employment location quotients for selected industries in Haringey relative to Greater London (the size of the bubble indicates the relative proportion of total employment taken by the sub-sector within Haringey), while Figures 3.5 and 3.6 illustrate the key sub-sectors which have experienced a notable increase or decrease in employment levels over the period between 1996 and 2006.

Figure 3-2 – Haringey: London Location Quotients and Sectoral Change in London 1996-2006⁶



⁶ The horizontal axis shows whether a sector’s employment is growing or declining in London, while the vertical axis shows the employment location quotient of Haringey in relation to London. For example, therefore, industries identified in the upper right quadrant are those which have experienced growth in the wider Economy and where Haringey is well represented. The size of the bubble indicates the importance of that sector in terms of Haringey’s employment. For example, Distribution accounts for 26% of employment while Construction accounts for 3.7%.

Figure 3-3 – Haringey:GB Location Quotients and Sectoral Change in GB 1996-2006

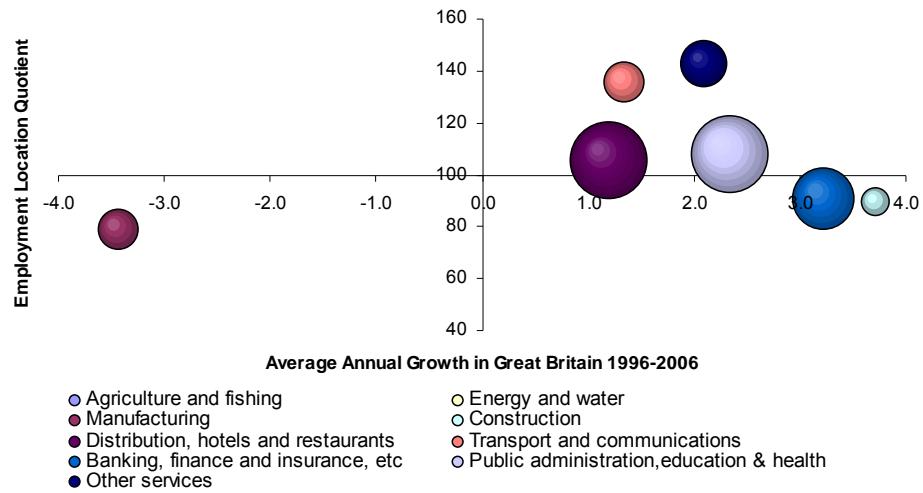
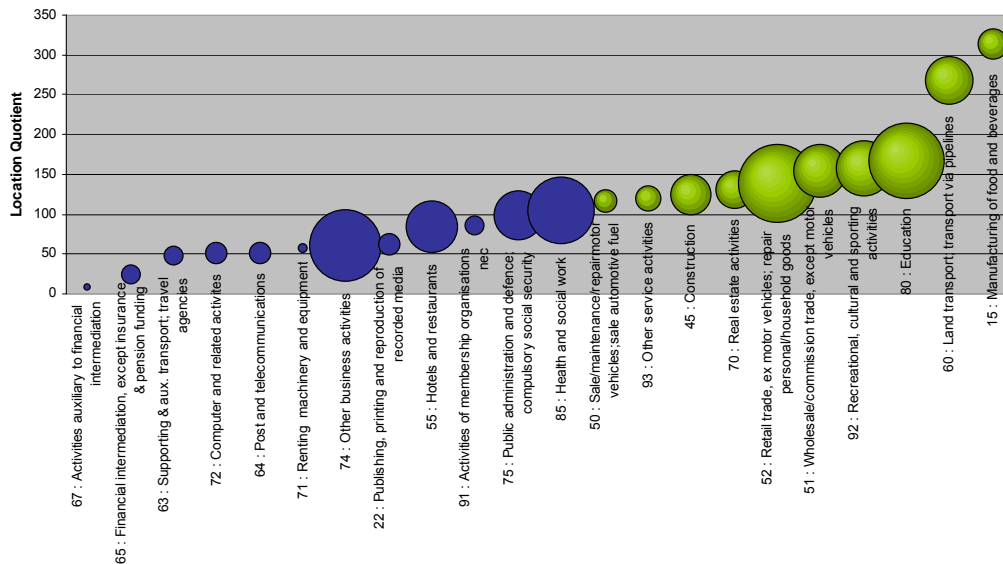


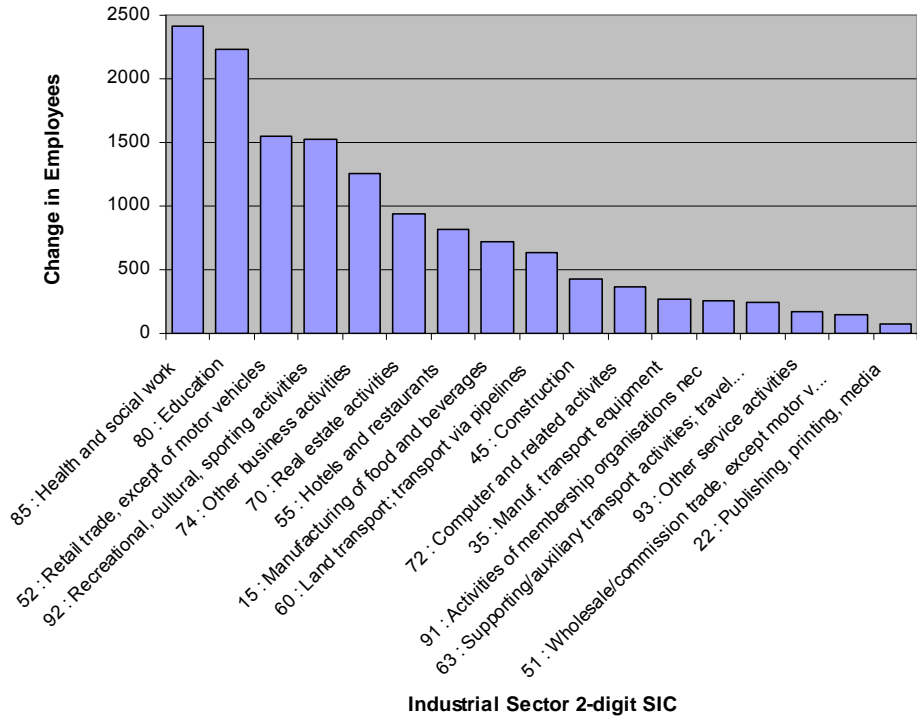
Figure 3-4 - Location Quotients for Selected Sub-Sectors (Haringey v London 2006)⁷



Source: NOMIS/Atkins Economics April 2008

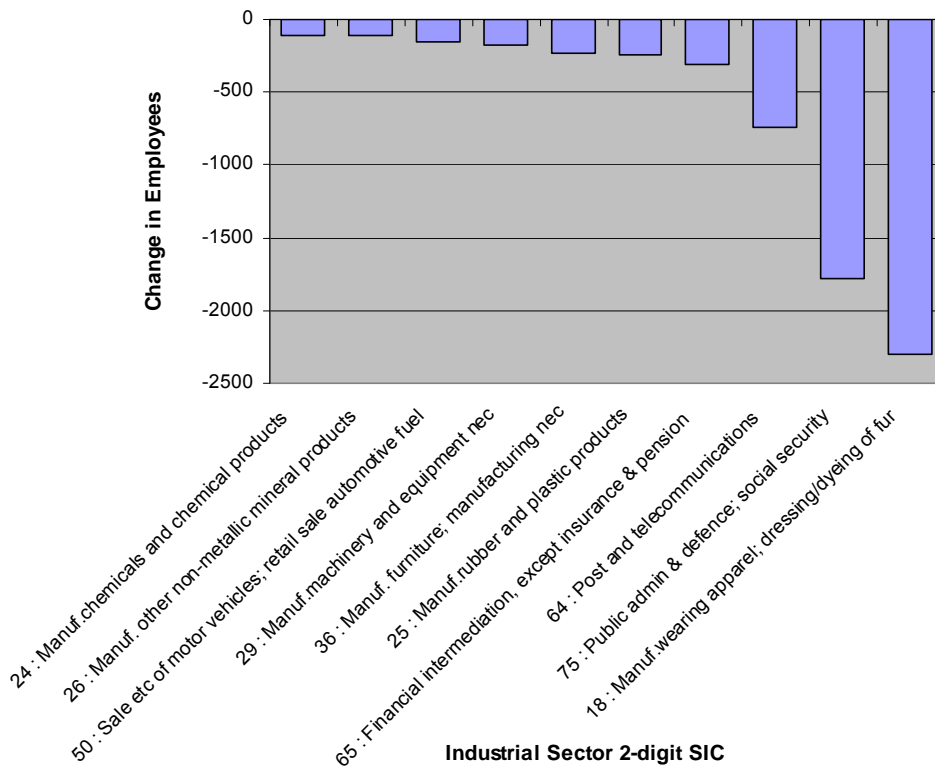
⁷ The size of the bubble indicates the relative proportion of total employment taken by the sub-sector within Haringey. Dark blue bubbles indicate sectors with a location quotient of less than 100, while pale green bubbles indicate a location quotient of more than 100.

Figure 3-5 - Expanding Sectors in Haringey 1996-2006 (change in employee numbers)



Source: NOMIS/Atkins Economics April 2008

Figure 3-6 – Declining Sectors in Haringey 1996-2006 (change in employee numbers)



Source: NOMIS/Atkins Economics April 2008

From the analysis of sub-sector employment trends, a number of important observations can be made in respect of Haringey’s economy, which is described below.

Public sector activities are a major source of employment in Haringey, accounting for 28% of all employment and having a LQ of 123 compared to London. However, while this sector has seen annual average growth of 1.9% between 1996-2006, this has been slightly slower than in London or Great Britain as a whole. Education and Health & social work are two of the most significant sectors at the two-digit level, accounting for 12.9% and 10.1% of employment respectively. Public administration accounts for 5.7% of 2-digit employment, though this sector has seen strong decline between 1996-2006.

The overall relative representation of the Distribution, Hotels & Restaurants sector has grown since 1996; it remains the second largest broad employment category accounting for 26% of all employment and the sector is strongly represented compared to London with a LQ of 123, up from 113 in 1996.

The retail sector (excluding motor vehicles) is the largest single employment sector at the 2 digit level, accounting for 12.9% of employment in 2006; the wholesale trade is also important, accounting for 6.1% of employment. The hotels and restaurants category is another important 2-digit sector in Haringey; it accounted for 6% of total Borough employment in 2006 and showed average growth of 2.6% between 1996-2006; however a LQ of 86 shows that this sector is under-represented compared to London.

While banking, finance and insurance - which has been growing in London and the wider economy - represents 18% of employment in the Borough, this sector is very poorly represented in Haringey, particularly compared to London. Its LQ is just 53, little changed from 52 in 1996. The Borough's representation relative to Great Britain in this sector has declined, as evidenced by its LQ falling from 91 to 83.

However, the Borough is well represented in Other Services, and its position relative to London for this sector has strengthened, with the LQ with London rising from 106 in 1996 to 142 in 2006. Falling within this sector, Other business activities represent the third most significant employment sector at the 2-digit level, accounting for 11.9% of all employment. This category includes a range of services such as professional services, management consultancy, renting of vehicles and equipment, software consultancy, repair of office machinery, advertising, industrial cleaning and labour recruitment. Many of these services support core business activities and have a range of locational requirements. Nevertheless, many of these activities are suited to locations which are cost efficient with good access to central commercial areas and a labour supply with varied occupational characteristics. Consequently, Haringey provides an opportunity to accommodate many of these service activities which support the Central London economy.

Manufacturing activities are continuing to decline in the Borough at a faster rate than in London or Great Britain. However, the Borough still has a LQ of 156 in relation to London for manufacturing (down from 172 in 1996) and the sector overall accounts for over 4500 jobs, or 7.5% of employment. Therefore if the sector continues to decline in the wider economy this may have a significant impact on future employment in the Borough. An exception to the general decline in manufacturing has been the food and beverage manufacturing sector, which has seen employment more than double between 1996-2006 to 1300 employees, or 2.1% of total employment.

Computing and related activities, while only accounting for 1.3% of employment (800 jobs) has seen one of the strongest rates of growth between 1996-2006, nearly doubling in size. However, it is still strongly underrepresented, with a LQ of only 50 compared to London.

Recreational, cultural and sporting activities are an important source of employment in Haringey with an employment share in 2006 of 6.5% (4,000 people). The sector showed strong growth between 1996-2006 and the sector has a LQ of 156 when compared with London.

While the position of Haringey in the broad Transport & Communications sector is similar to that of London, a particularly significant 2-digit sector is Land Transport, which accounts for 5.1% of total employment and has a LQ of 269 compared with London. The sector has seen average annual growth of 2.3% between 1996-2006

The construction sector, which is experiencing high levels of growth nationwide, is growing at the same rate as London yet well represented in comparison to London with a LQ of 128.

Overall Haringey appears to be experiencing a faster than elsewhere decline in employment in declining sectors, and its employment structure appears to be increasingly oriented towards the growth sectors, with the notable exception of banking and finance. This implies that restructuring of Haringey's economy is still ongoing. However, given the significance of manufacturing, and the strategic significance of manufacturing areas in the Central Leaside Area on the border with Enfield Borough the LDF policies may need to address the needs of this sectors.

3.2.3 B Use Class Employment

Most 'employment' policies contained in development plans relate to jobs associated with premises which accommodate business and industrial activities categorised under the 'B' Use Class (B1a, B1b, B1c, B2 and B8). It is recognised that other activities form an important component of total employment, but this study focuses primarily on the demand for and supply of B Use Class land and premises.

Table 3.4 - Estimates of B Use Class Employment in Haringey (1996-2006)

B-Use Broad SIC	1996		2002		2006		% Ann Growth 96-06
	No.	% of Total	No.	% of Total	No.	% of Total	
Manufacturing	7,458	25.1	5,311	16.3	4,559	14.5	-4.80
Construction	1,806	6.1	2,597	8	2,237	7.1	2.16
Distribution and Wholesale	4,465	15.0	5,054	15.5	4,457	14.1	-0.02
Transport and Communications	4,287	14.4	4,310	13.2	4,399	13.9	0.26
Financial Intermediation and Other Business	8,628	29.1	11,119	34	10,816	34.3	2.29
Other Services	3,047	10.3	4,267	13.1	5,076	16.1	5.24
Total B-Use	29,691	100.0	32,658	100	31,543	100	0.61

Source: NOMIS / Annual Business Inquiry / Annual Employment Survey Atkins Economics (May 2008)

Employment in the B use class for Haringey has been calculated using selected 3 and 4 digit SIC codes as a proxy for B use class employment. (See Appendix A for details). Table 3.4 sets out our estimates of B use class jobs in Haringey. It shows that approximately 31,500 B use class jobs were provided in Haringey in 2006. This represents around 52% of total employment in the Borough.

Of particular significance is the importance of the banking, finance and insurance sector which accounts for around 34% of all B use class employment and 18% of total employment in Haringey (2006). Importantly, this sector includes 'other business activities' such as professional services, management consultancy, renting of vehicles and equipment, software consultancy, repair of office machinery, advertising, industrial cleaning and labour recruitment. Other sectors (other than construction) have broadly similar importance in terms of B-Use employment. However, Other Services accounts for 16% of B-Use employment; this is 8.3% of total employment in the Borough.

3.3 Population and Labour Market

3.3.1 Economic Activity

The level of economic activity, often referred to as the available workforce, is the sum of working age population who are either in employment, or registered as unemployed. The economic activity rate is calculated by the quotient of workforce to working age population, and can be regarded as a measure of total participation.

Table 3.5 sets out the rates of economic activity for Haringey and London for the year 1996, 2001 and 2007. Haringey has experienced fluctuations in economic activity rates since 1996 which do not follow those for London, though economic activity rates have remained consistently below those for London. Economic participation has significantly increased between 2001 and 2007, compared to a fall in participation in London.

Table 3.5 - Economic Activity rates (1996-2007)

Haringey			Greater London		
1996	2002	2007	1996	2002	2007
70.1	69.7	72.8	78.3	78.3	74.7

Source: NOMIS May 2008

3.3.2 Unemployment

Unemployment rates in Haringey have consistently been higher than in Greater London since 1996. However, the gap has narrowed since the 1990s.

Table 3.6 - Unemployment rates (1996-2007)

Haringey			Greater London		
1996	2002	2007	1996	2002	2007
13.9	9.0	8.8	7.9	5.2	7.1

Source: NOMIS May 2008

3.3.3 Wages

Table 3.7 shows that median weekly wages in Haringey in 1996, 2002 and 2007 were significantly lower than the Greater London, though slightly higher than national averages. However, the rate of wage growth has been faster than both London and GB, implying that Haringey gradually is closing its wage gap.

Table 3.7 - Median Gross Weekly Wage Levels 1998-2007 (workplace)⁸

	Haringey			London			Great Britain		
	1998	2002	2007	1998	2002	2007	1998	2002	2007
Average wage (£)	347	417	500	419	501	581	336	392	459

Source: NOMIS Annual Survey of Hours and Earnings May 2008

⁸ The Annual Survey of Hours and Earnings provides data since 1998 only

Table 3.8 - Annual Average Wage Growth 1998-2007(Workplace)

	Haringey	London	Great Britain
	1998-2007	1998-2007	1998-2007
Annual average growth %	4.2	3.7	3.5

Source: NOMIS Annual Survey of Hours and Earnings May 2008

3.3.4 Qualifications

Overall, the level of qualifications obtained has improved since 2001. There is a lower proportion of local residents with no qualifications (23.4% and 17.2% in 2001 and 2006 respectively), whilst there is a slight increase in the number of people obtaining other qualifications.

Table 3.9 – Haringey Qualifications Profile⁹

	No qualifications	Level 1	Level 2	Level 3	Level 4/5	Other/unknown qualifications
2001	23.4	9.8	14.2	10.2	37.9	4.6
2006	17.2	8.9	11.8	10.2	29.8	15.7

Source: NOMIS: Census Area Statistics, 2001; Local Labour Force Survey, March 2008

3.4 Business Structure

The total number of business units in Haringey by broad industrial sector is set out in Table 3.10 for 1996, 2002 and 2006, including the total and the annual average growth rates over this period.

Total business growth in Haringey averaged around 3.5% per annum between 1996 and 2006. This compares with 1.8% in London and 1.2% in Great Britain. It is notable that employment over the same period increased at similar rates in all three areas (1.3% pa).

The distribution, hotels and restaurants and the banking, finance and insurance sectors (which include other business services) accounted for the majority of all businesses in Haringey in 2006. Both sectors have experienced growth between 1996 and 2006, however in the banking, finance and insurance sector this growth has been particularly significant. The number of businesses in this sector has more than doubled over the time period, increasing the banking finance and insurance sector from 22% of total businesses to 34%. Other sectors that have increased their presence in Haringey between 1996 and 2002 are Other Services (5.3% per annum growth) and, to a lesser extent, the public sector and distribution, hotels and restaurants (2% and 2.5% respectively).

The manufacturing sector has been in decline in the Borough and since 1996 has further lost its proportion of total business establishment from 14% in 1996 down to 6.7% in 2006 (around 3.9% per annum).

⁹ Percentages for 2006 might not give a total of 100 as there are variations estimated within them giving a confidence number of 3.7.

Table 3.10 - Business Establishments in Haringey 1996-2006

	1996		2002		2006		% Total Growth 1996-2006	% Ann Av. Growth 1996-2006
	No	%	No	%	No	%		
Agriculture and fishing	7	0.1	5	0.1	5	0.1	-28.6	-3.3
Energy and water	3	0.0	4	0.0	2	0.0	-33.3	-4.0
Manufacturing	845	14.0	705	8.5	570	6.7	-32.5	-3.9
Construction	353	5.9	357	4.3	404	4.8	14.4	1.4
Distribution, hotels and restaurants	1,971	32.7	2,446	29.3	2,414	28.5	22.5	2.0
Transport and communications	192	3.2	228	2.7	216	2.5	12.5	1.2
Banking, finance and insurance etc	1,335	22.2	2,685	32.2	2,885	34.0	116.1	8.0
Public administration, education and health	573	9.5	650	7.8	733	8.6	27.9	2.5
Other services	743	12.3	1,257	15.1	1,249	14.7	68.1	5.3
Total	6,022	100.0	8,337	100	8,478	100	40.8	3.5

ATKINS

Source: NOMIS/Atkins Economics (May 2008)

Location quotients reveal that the manufacturing sector is particularly important to the business structure in London. Although the representation of manufacturing firms in 2006 has slightly declined since 2002 relative to both Greater London and Great Britain, the sector remains significant.

Compared to Great Britain, Haringey has proportionally more businesses in the banking, finance and insurance, and other services sectors, whilst the public sector and construction is underrepresented. However, when Haringey is compared to London it can be seen that it is still strongly overrepresented in the manufacturing sector (though this has reduced since 1996) and other services are less overrepresented (at a LQ of 138 relative to London against a LQ of 174 relative to Great Britain). The Borough is underrepresented in the Banking finance and insurance sector relative to London, though it has seen a steady growth in the relative strength of this sector since 1996.

The distribution, hotels and restaurants and the other services sectors in the Borough have also slightly risen since 1996 relative to London and nationally. This indicates that Haringey has strengthened its role as an important location for the provision of consumer and producer services to both local and regional markets.

Table 3.11 - Business Unit Location Quotients 1996-2006

	Haringey: London			Haringey: Great Britain		
	1996	2002	2006	1996	2002	2006
Agriculture and fishing	91	65	77	19	11	12
Energy and water	33	58	31	17	19	12
Manufacturing	192	145	138	152	105	97
Construction	98	77	82	63	48	50
Distribution, hotels and restaurants	115	114	117	99	97	101
Transport and communications	76	70	73	67	58	58
Banking, finance and insurance	64	80	79	91	109	105
Public administration, education and health	132	115	118	109	90	92
Other services	103	127	138	127	161	174

Source: NOMIS/Atkins Economics (May 2008)

3.4.1 Business Size

Table 3.13 highlights the importance of small companies to the Haringey economy. Some 90% of all businesses in the Borough are in the size band with 1-10 employees. The percentage has slightly increased since 2002, when 89% of all firms were small sized, whilst the number of business with 50-199 employees has decreased for the same period. There have been no major changes in the representation of small, medium and large companies in the Borough since 2002 as the table shows. However the number of business units expanded within most size band categories. The number of firms with over 200 employees increased by 1.7 between 2002 and 2006, while the number of small and medium companies decreased by 1,654.

Table 3.14 shows the location quotients of business units in the Borough compared to Greater London. Companies with 11 employees or more have decreased their presence in Haringey compared to London since 2002. This trend is slightly more evident for small and medium sized companies experiencing annual average decline of 3.65% since 2002, the highest among different sized companies. Conversely, the growth of micro business units has been limited in recent years (0.73% per annum), whilst the proportion of large businesses has increased annually by 1.74% since 2002. Despite under-representation with regard to London, this increase is significant for Haringey. There are now 30 large firms in the Borough employing an average of 457 people each; this equates to 22% of total employment in 2006.

Table 3.12 - Business units by employment size band in Haringey

	1996				2002				2006			
	Companies		Employees		Companies		Employees		Companies		Employees	
	Level	% of total	Level	Av per unit	Level	% of total	Level	Av per unit	Level	% of total	Level	Av per unit
1-10 employees	5,162	86	14,402	2.8	7,408	89	17,736	2.4	7,627	90	17,769	2.3
11-49 employees	672	11	15,266	22.7	713	8.6	15,635	22	659	7.8	14,921	23
50-199 employees	161	2.6	14,201	88.2	188	2.3	16,262	86.5	162	1.9	14,608	90
200 + employees	27	0.4	9,913	367	28	0.3	10,790	385	30	0.4	13,705	457
Total	6,022	100	53,782	8.9	8,337	100	60,423	7.2	8,478	100	61,002	7.2

Source: NOMIS (May 2008)

Table 3.13 - Size band quotients of business units (Haringey: London)

	1996	2002	2006
1-10 employees	99	103	103
11-49 employees	108	82	79
50-199 employees	104	84	77
200 or more employees	64	46	53
Total	100	100	100

Source: NOMIS (May 2008)

Table 3.14 - Business Units, Annual Average Growth Rates (2002 – 2006)

	2002-2006
1-10 employees	0.73
11-49 employees	-1.95
50-199 employees	-3.65
200 or more employees	1.74
Total	0.42

Source: NOMIS (May 2008)

3.4.2 Enterprise

Tables 3.15 – 3.17 examine VAT registrations and de-registrations which can be used as a proxy for measuring enterprise activity and business survival rates. Table 3.17 shows that total registrations have decreased in absolute numbers by 55 between 2002 and 2006 (135 between 1996-2006). The greatest decline has been in the manufacturing sector; the wholesale and retail sector has also seen a decline of 25 between 2002 and 2006. However, the Real Estate sector has seen an increase in registrations.

Table 3.15 - VAT Registrations in Haringey (1996 – 2006)

Industry	1996	2000	2002	2004	2006
Agriculture; fishing	0	0	5	5	0
Mining; energy/water	0	0	0	0	0
Manufacturing	155	75	45	65	35
Construction	40	30	55	55	40
Wholesale and retail	230	310	210	245	195
Hotels and restaurants	90	120	95	130	70
Transport and communications	30	30	30	20	15
Finance	5	0	0	5	10
Real estate	260	290	290	290	315
Public administration; other	100	105	95	70	95
Education; health	5	5	10	10	5
Total	915	965	835	895	780

ATKINS

Source: NOMIS (May 2008)

The number of de-registrations in the Borough has decreased since 1996, from 770 to 705 in 2006, with a peak in 2004 of 795. This implies that more companies have managed to survive over recent years. Most sectors have shown moderate decline in the number of de-registrations such as the real estate sector (from 250 in 2002 down to 240 in 2006); the manufacturing sector (70 in 2002 down to 40 in 2006); and the wholesale and retail sector (down to 185 from 230 in 2002). Others include the hotels and restaurants and the public sector.

Table 3.16 - VAT De-Registrations in Haringey (1996-2006)

Industry	1996	2000	2002	2004	2006
Agriculture; fishing	0	0	0	5	0
Mining; energy/water	0	0	0	0	0
Manufacturing	200	80	70	55	40
Construction	50	35	35	35	40
Wholesale and retail	210	225	230	200	185
Hotels and restaurants	75	90	120	125	110
Transport and communications	20	25	20	15	20
Finance	0	5	5	5	0
Real estate	125	235	250	265	240
Public administration; other	85	80	55	85	65
Education; health	5	5	5	5	5
Total	770	780	790	795	705

Source: NOMIS (May 2008)

Between 1996 and 2002 there have been major fluctuations in the total net change of companies in Haringey (registrations less de-registrations). Table 3.17 demonstrates increasing activity in the second half of the 1990s. Conversely, since 2002 the table indicates that enterprise capacity has contracted.

Overall, the net change in VAT registrations has been positive in some sectors since 2002, with the real estate sector leading by increasing its stock of business in the Borough by 75 businesses whilst others such as the public sector has seen a decrease of 40 businesses. It is notable that de-registrations in the manufacturing sector have consistently exceeded registrations over the past decade.

Table 3.17 - Net Change in VAT Registrations in Haringey (1996-2006)

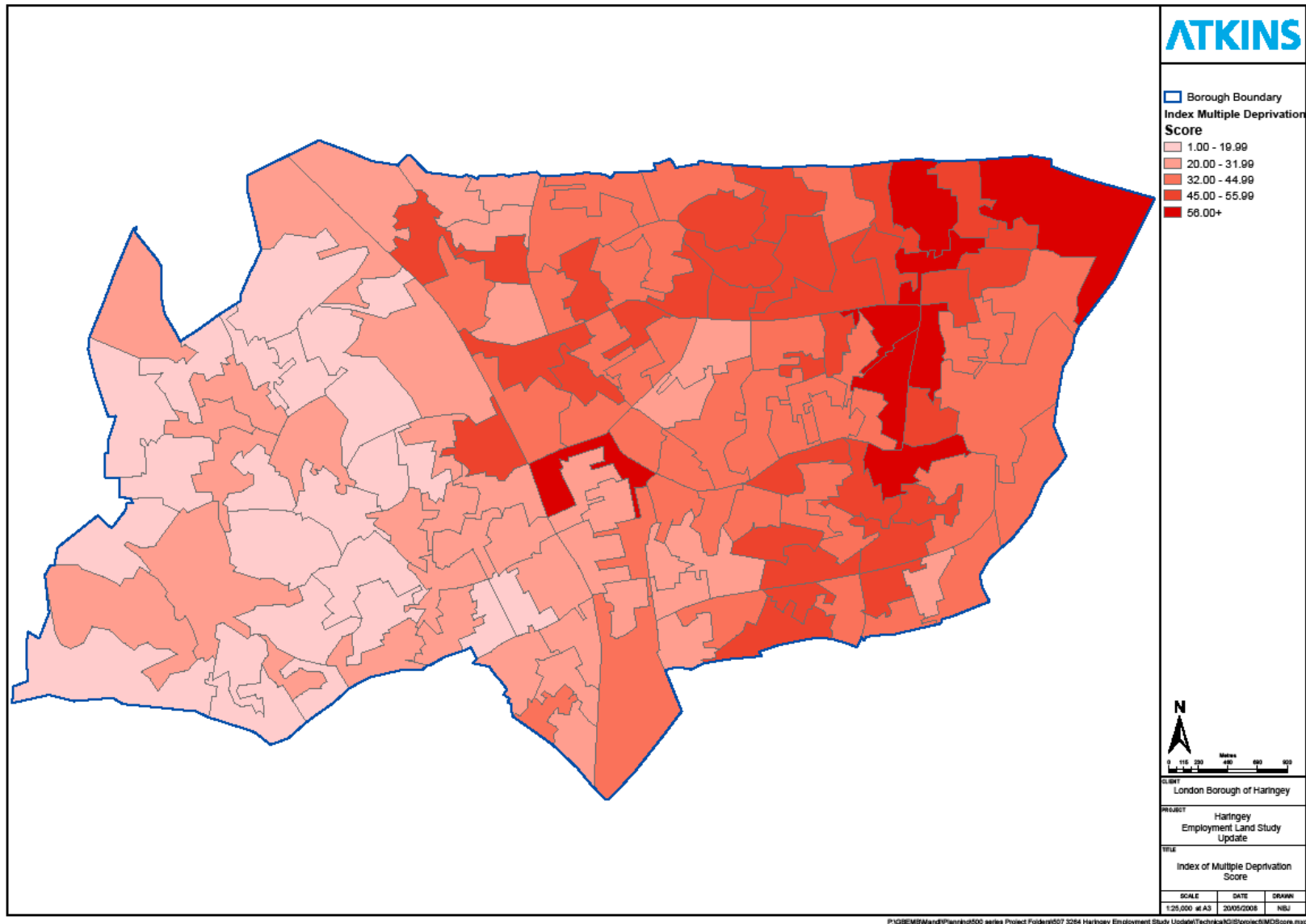
Industry	1996	2000	2002	2004	2006
Agriculture; fishing	0	0	5	0	0
Mining; energy/water	0	0	0	0	0
Manufacturing	-45	-5	-25	10	-5
Construction	-10	-5	20	20	0
Wholesale and retail	20	85	-20	45	10
Hotels and restaurants	15	30	-25	5	-40
Transport and communications	10	5	10	5	-5
Finance	5	-5	-5	0	10
Real estate	135	55	40	25	75
Public administration; other	15	25	40	-15	30
Education; health	0	0	5	5	0
Total	145	185	45	100	75

Source: NOMIS (May 2008)

3.5 Deprivation

Based on the ONS (composite) Index of Multiple Deprivation Score 2007, Haringey is the 6th most deprived local authority among the 33 London Boroughs and the 18th most deprived in England & Wales out of a total of 354 local authorities. Figure 3.7 shows the distribution of multiple deprivation across the Borough. Areas highlighted with a darker shade of red represent the most deprived areas in Haringey, whilst those in lighter shades point to the least deprived areas. It can be seen that concentrations of deprivation are distributed in pockets throughout the Borough but that there is a very strong distinction between areas to the north east of the Borough which show high levels of deprivation and those to the west which generally show lower levels of deprivation.

Figure 3-7 – Index of Multiple Deprivation in Haringey by Super Output Area (2007)



3.6 Central Leaside Area

The Central Leaside area, identified as strategically important industrial land for London, is located within the Upper Valley, and falls within Lower Level Super Output Area (LSOA) Haringey 002B, plus, from south to north, LSOAs Enfield 33F, 30C and 25D.

The Central Leaside AAP study area baseline report¹⁰ identified that the AAP area, which spans the borough boundary of Enfield and Haringey and includes parts of six wards, (namely (i) Jubilee, (ii) Lower Edmonton, (iii) Edmonton Green, (iv) Upper Edmonton, (v) Northumberland Park, and (vi) Tottenham Hale) has a small resident population of 4,843 individuals. The population is imbalanced, with a higher proportion of young and elderly people, i.e. a higher proportion of economically inactive individuals. The population in the area also suffers in terms of deprivation: educational attainment is low and the skills base is low. At the ward level the indices reveal that deprivation is particularly acute in the two Haringey wards, namely Northumberland Park and Tottenham Hale. Employment here is predominantly of the low wage, low skill sector and the changes that have taken place and which are forecast to take place may exacerbate this problem.

Tables 3.18-3.20 below show the employment and business unit structure of the Haringey area of the Central Leaside area compared to that for the areas within Enfield Borough. While the data at LSOA level does not necessarily match the study area boundaries precisely, this level provides the most detailed readily available picture of activity in the area.

Table 3.18 – Broad Sector Employment and Business Establishments in Central Leaside Area 2006

Broad Sector	LSOA Haringey 002B				LSOAs Enfield 33F, 30C, 25D			
	Units	%	Employees	%	Units	%	Employees	%
Agriculture and fishing	C	C	C	C	C	C	C	C
Energy and water	C	C	C	C	C	C	C	C
Manufacturing	39	18.8	808	26.6	103	22.8	1132	22.5
Construction	12	5.8	79	2.6	41	9.1	401	8.0
Distribution, hotels and restaurants	88	42.5	928	30.5	160	35.4	1547	30.7
Transport and communications	8	3.9	292	9.6	33	7.3	854	16.9
Banking, finance and insurance	42	20.3	622	20.4	78	17.3	359	7.1
Public administration, education and health	7	3.4	126	4.1	14	3.1	337	6.7
Other services	10	4.8	180	5.9	23	5.1	409	8.1
Total	207	100	3,043	100	452	100	5039	100

C = Confidential (1947 Statistics of Trade Act).

¹⁰ Central side Area Action Plan Baseline Report. Urban Initiatives for Enfield Council and Haringey Council, June 2007

Table 3.19 – B-Use Employment and Business Establishments in Central Leaside Area 2006

B-Use Broad Sector	LSOA Haringey 002B				LSOAs Enfield 33F, 30C, 25D			
	Units	%	Employees	%	Units	%	Employees	%
Manufacturing	39	23.2	808	32.5	103	26.9	1132	29.6
Construction	12	7.1	79	3.2	41	10.7	401	10.5
Distribution and Wholesale	63	37.5	672	27.0	112	29.2	718	18.8
Transport and Communications	C	4.8	292	11.7	33	8.6	854	22.3
Financial Intermediation and Other Business	42	25.0	622	25.0	78	20.4	359	9.4
Other Services	C	2.4	16	0.6	16	4.2	358	9.4
Total B-Use	168	100.0	2,488	100.0	383	100.0	3823	100.0

C = Confidential (1947 Statistics of Trade Act).

Table 3.20 – Business Structure in Central Leaside Area 2006

	LSOA Haringey 002B		LSOAs Enfield 33F, 30C, 25D	
	Units	Employees	Units	Employees
1-10 employees	153	542	371	1,133
11-49 employees	41	981	59	1,304
50-199 employees	11	947	20	1,763
200 or more employees	C	572	C	839

C = Confidential (1947 Statistics of Trade Act).

Within the Haringey 002B LSOA there were 207 business units in 2006 (excluding confidential data), employing just over 3000 people. This is just under a third (31%) of total business units within the four LSOAs covering the Central Leaside area, and just over a third (38%) of employment.

Within the Central Leaside area overall, Distribution, hotels & restaurants, followed by Manufacturing, are the dominant sectors. Distribution, Hotels and restaurants accounts for 88 establishments (43%) and 928 employees (31%) in Haringey LSOA, compare with 35% of establishments and 31% of employment in the Enfield LSOAs. This significance is largely attributable to the Distribution and Wholesale B-Use sector, which accounts for 38% of B-Use establishment and 27% of employment in Haringey LSOA (29% and 19% respectively in Enfield).

Haringey has a lower proportion of manufacturing business establishments than Enfield (19% vs 23%), though a higher proportion of employees (27% vs 23%) in this sector. This pattern is also apparent in B-Use employment and business structure, implying that this southern section of the Central Leaside area has more smaller manufacturing units than exist in Enfield.

Overall, however, the Haringey element of the Central Leaside area has a larger average number of employees, at 14.2 employees per establishment against 11.1 in the Enfield LSOAs. 74% of the businesses in the Haringey LSOA have 1-10 employees against 82% in the Enfield LSOAs.

Banking, finance and insurance is an important sector in the Haringey LSOA, accounting for 20% of both employment and establishments in broad sectors, and 25% of B-Use employment and establishments. This is in contrast to the Enfield area, where, though the proportion of establishments are slightly lower than for Haringey's LSOA at 17.3% of broad sector data establishments and 20.4% of B-use establishments, the sector accounts for very low levels of employment; this implies a much larger firm size in the Haringey area in this sector.

Within the Enfield LSOAs of the Central Leaside area, the transport and communications sector is an important source of employment. However, this sector is less important in Haringey's LSOA. This difference may be partly accounted for by the presence of one or two larger establishments in Enfield.

3.7 Key Messages

Haringey's economy is dominated by employment in three key broad sectors which together account for over 80% of employment, namely:

- Public administration, education and health
- Distribution, hotels & restaurants
- Banking, finance and insurance

Other services are also, to a lesser extent, an important sector. In general terms, the representation of Haringey in broad growth sectors is mixed; it is strongly represented in Other services and in public sector activities but poorly represented in banking and finance. It is well-represented in construction relative to London but not to Great Britain.

Manufacturing employment in Haringey continues to decline. This decline is more pronounced in Haringey than in London or Great Britain. This may indicate that restructuring within the Borough's economy has not yet levelled and that consideration should be given to the potential transfer of obsolete industrial land to other uses. The strong representation in this sector compared to other areas reflects the presence of significant strategic industrial areas in the area. However the LDF should consider means of balancing the significance of the sector locally with wider sectoral decline.

While the 'banking, finance and insurance' sector continued to grow at the same rate as London, this sector remains underrepresented. However, the growth rate for Other Services employment has been much faster than for London and Great Britain and the Borough is overrepresented in this sector, as it is for public sector activities. These two sectors accounts for half of all B-Use employment in the Borough, up from 39% in 1996. In line with strategic economic trends, it is likely that a high proportion of employment growth in the Borough will be accounted for by the business and related services sector.

In terms of business structure, manufacturing remains significant in Haringey, where it is still relatively strongly over-represented compared to other locations in London. In terms of business numbers, Haringey has proportionally more businesses in the banking, finance and insurance, and other services sectors compared to Great Britain, while the public sector and construction is underrepresented. However, the Borough is underrepresented in the Banking finance and insurance sector relative to London, though it has seen a steady growth in the relative strength of this sector since 1996. The distribution, hotels and restaurants and the other services sectors in the Borough have also slightly risen since 1996 relative to London and nationally. This indicates that Haringey has strengthened its role as an important location for the provision of consumer and producer services to both local and regional markets.

Small businesses make up the majority of total business units in the Borough and, relative to London, the proportion of smaller businesses is growing. However, despite under-representation compared to London, there has been a slight increase in the number (and size) of large companies with 200 or more employees in the Borough. There are now 30 large firms in the Borough employing an average of 457 people each which equates to 22% of total employment in 2006.

Enterprise capacity has slowed down in recent years, more specifically since 2002. The hotels and restaurants sector has contracted by 40 units in 2006, whilst the real estate sector has increased by 75 units. De-registrations in the manufacturing sector have consistently exceeded registrations over the past decade.

Median weekly wages in the Borough have consistently been slightly higher than that for Great Britain and considerably lower compared to London. The level of qualifications obtained has

improved with fewer people with no qualifications and more gaining other qualifications. Unemployment rates in Haringey have remained consistently higher than in Greater London since 1996. However, the gap has narrowed since the 1990s.

4. Employment Forecasts and Projections

4.1 Introduction

This Section provides a series of quantitative scenarios of workplace employment in the London Borough of Haringey for the period up to 2026. Also provided are our estimates of the future demand for employment floorspace and employment land, which are derived from the employment forecasts. The forecasts concentrate on a broad SIC¹¹ definition of B-use classes, which are the subject of employment land policies as defined by the Use Classes Order.

It should be highlighted that the projections set out in this Section are indicative and should not be considered prescriptive. Moreover, given the long-term nature of the projections, the estimates set out below to not predict short-term fluctuations in economic cycles. Whilst current prospects for the UK economy are uncertain as a result of the credit crisis in the housing market and high energy prices, the projections set out in this Section assume that short-term fluctuations in economic cycles even out over time. Despite this and in reality, the current economic climate is likely to have a dampening effect on the development market in Haringey over the next 2 years especially for residential and mixed-use schemes.

4.2 Sub-Regional Context: GLA Forecasts

The latest GLA forecasts were published in February 2007¹². GLA use a 'triangulated' set of employment projections which unify the results of forecasts undertaken using three different methods. These methods are:

- Trend-based Forecasts

Forecasts were undertaken by Volterra¹³ based on output and employment data for London up to 2004. To develop forecasts at Borough level, Volterra used trend-based Borough level forecasts for sectors which have historically accounted for 10 percent or more of total employment in each Borough. A residual series then covered the remaining sector within each Borough. The sum of the Borough-level forecasts was constrained to match the trend-based forecasts undertaken at the overall level for London.

- Transport Accessibility Forecasts

The forecasts, undertaken by Colin Buchanan and Partners¹⁴, investigate how employment may be distributed across London according to future changes in accessibility. Future transport infrastructure improvements, as set out in the Mayor's Transport Strategy, provide the key variables for the forecasts which are constrained by the overall London employment forecast. Analysis was carried out at ward level and, simply stated, increased accessibility allowed for increased densities and therefore more employment.

- Site Capacity Forecasts

Forecasts were undertaken by RTP¹⁵ based on the additional amount of site capacity expected to come on stream in London Boroughs before 2026. The forecasts were broken

¹¹ Standard Industrial Classifications

¹² Current Issues Note 13: Updated borough-level employment projections to 2026, GLA Economics (February 2007, Greater London Authority)

¹³ Working Paper 20: Employment projections for London by sector and borough, Volterra Consulting (February 2007, Greater London Authority)

¹⁴ Employment Projections Technical Paper 3, 'Employment, Growth and Distribution'; Colin Buchanan and Partners (GLA, October 2006)

¹⁵ Employment Projections Technical Paper 2, 'London Employment Sites Database, Technical Notes and Results'; Roger Tym and Partners (GLA, October 2006)

down by office, industrial and the rest of the economy (e.g. retail, hotels, leisure etc) and allowed for the change of use between employment land as sectors expanded and declined.

Table 4.1 sets out the top level employment forecasts for Haringey as published by the GLA for each of the forecast methods and the overall triangulated method and for B-use employment by use-type.

Table 4.1 – GLA Employment Projections for the London Borough of Haringey

	Employment numbers					Annual growth (%)	Total growth (%)	Annual growth (number)	Total growth (number)
	2006	2011	2016	2021	2026	<i>Between 2006 and 2026</i>			
Trend based	76 000	78 000	78 000	78 000	79 000	0.2	3.9	150	3 000
Capacity based	74 000	75 000	90 000	99 000	108 000	1.9	45.9	1 700	34 000
Transport accessibility based	76 000	80 000	83 000	86 000	89 000	0.8	17.1	650	13 000
Triangulated projections: total employment	76 000	74 000	81 000	85 000	89 000	0.8	17.1	650	13 000
Office employment	16 300	n/a	n/a	n/a	24 500	2.1	50.3	410	8 200
Industrial employment	11 700	n/a	n/a	n/a	10 200	-0.7	-12.8	-75	-1 500

Source: GLA

4.3 Atkins Methodology

4.3.1 Introduction

Forecasts published by the GLA are taken as an initial reference for the future level of employment in London and Haringey. Atkins has then undertaken independent analyses to assess the potential for different employment growth trajectories in the London Borough of Haringey.

When comparing the employment data published by the GLA to the projections produced in this report, the following issues should be taken into account:

- **Date of published data:** The Atkins projections undertaken in this report are based on published employment data up to 2006. The GLA forecasts were based on published employment data up to 2004. Therefore, where the employment level is shown for 2006, under the GLA this figure refers to a forecasted level whilst under Atkins this figure refers to the published level;
- **Employment requiring no B-use premises:** As the purpose of this study is to demonstrate the expected requirement for B-use employment floorspace in the Borough, Atkins have made no adjustment to the scale of employment published by the Annual Business Inquiry (ABI). The ABI data does not include employment in private households, home-workers or the self-employed. A majority of these types of workers will not require any formal B-use premises and therefore should not be included in forecasts for employment land allocation policies. This is in contrast to the GLA forecasts which do include these types of employment. Therefore the forecast levels of employment under the GLA forecasts are larger than those produced in this document by a factor equivalent to the prevalence of these worker types.

4.3.2 Scenarios

There are a wide range of factors that have the potential to shape the structure and performance of the London and Haringey economies over the coming years. As such it is necessary to devise a range of future scenarios for the Borough, which can account and test for the impact of these forces to varying degrees. Three scenarios have therefore been developed for Haringey which cover the period up to 2026. The scenarios are:

- **Scenario 1 – Neutral Trends**

This scenario projects employment in Haringey based on medium (1997 to 2006) and short term (2002 to 2006) employment trends in the Borough which take account for the current economic cycle (which started in 1997 according to HM Treasury) and recent economic momentum. It uses a similar methodology to the trend-based forecasts undertaken by Volterra for the GLA, although it does not take into account employment growth in other London boroughs and is based on more up-to-date employment data (2006 data as compared to 2003 data in the Volterra forecasts). As such it could be considered an updated trend-based forecast for Haringey.

Scenario 1 predicts an overall level of employment growth equal to an average of 0.3 percent per annum between 2006 and 2026. This is in keeping with the longer-term rate that has been apparent in the Outer London Boroughs over the last fifteen years or so (LSE), and is significantly below the long-term UK average. By the trend-based methodology employed, it is implied that similar aspects that led to below average growth in the Outer Boroughs will persist in the future. These factors are stated by LSE as weakness in the employment base of the Boroughs, relatively disadvantageous locational characteristics and biases and/or constraints on development of commercial sites in Outer London.

- **Scenario 2 – Policy Orientated Growth**

This scenario links the council's and wider Government bodies' strategic development policies to the forecasting process. Essentially it takes account of a number of influencing factors which have the potential to alter the future employment growth trajectory from its trend rate. The principal factors considered within Scenario 2 are:

- Broad economic restructuring, whilst contributing to suppressed growth in recent years, has led to an improvement in the relative structure of the Borough's employment base and will continue to do so over the forecast period.
- It can be considered that strategic action aimed at upgrading local centres in the Borough will create the potential for attracting service sectors. Haringey Council have specific policies identified to '*enhance the environmental quality and attractiveness of the Borough's town centres in response to changing economic and retail demands*'.
- Haringey is located within the southern part of the London-Standsted-Cambridge-Peterborough (LSCP) Corridor. The Corridor was designated as one of the Government's four Growth Areas in the 2003 Sustainable Communities Plan. The corridor is considered to have the potential for considerable housing and employment growth. The performance of the Corridor is enhanced by the availability of the Growth Area Fund.
- Specific policy and development plans include:
 - Strategic priorities for North London as set out in the London Plan (2008)
 - Tottenham: delivering the Transforming Tottenham Project through the delivery of the masterplan for Tottenham Hale, developing the gateway sites at Seven Sisters and at the northern end of the High Road and developing the old Town Hall site.
 - Seven Sisters: a New Deal for Communities area where targeted initiatives seeks to promote regeneration, tackle poverty and social exclusion in the area.
 - Haringey Heartlands: delivering major mixed use developments on the eastern and western utilities lands, linked to the regeneration of Wood Green town centre.
 - Working with Enfield to regenerate a strategic employment location at Central Leaside which includes parts of Northumberland Park.
 - Strengthening the role of town centres – the Borough contains six town centres where change needs to be managed.
- Combined / Central Scenario – an unweighted average of Scenarios 1 and 2.

4.3.3 Method

Scenario 1

Scenario 1 uses a Labour Demand forecasting technique, which conforms to ODPM / DCLG guidance on forecasting methods recommended by the Government's Guidance Notes on Employment Land Reviews. This technique involves the extrapolation and manipulation of historical trends in sectoral employment over the forecast period to provide an estimate of the potential future demand for labour in Haringey. The starting point in history for the trend analysis has a significant impact on the outcome of the modelling process. A medium-term trend, defined as 1997 to 2006 in order to conform to the current economic cycle which is judged by HM Treasury to have begun in 1997, and a short-term trend, defined as 2002 to 2006 in order to take account of more recent economic momentum and trends, forms the basis of the forecasts.

Total employment (i.e. B use class and other types of employment) has been forecast by extrapolating trends for the key sectors in the Borough. B-use employment was forecast by extrapolating trends for each of the B-use sectors (see Appendix A for a definition of the B-use sectors).

For each of the sectors the initial five years of the forecast period, 2007-2011, has been based on short-term employment trends. The remainder of the forecast period, 2012-2026, has been based on medium-term trends, although these have been subject to adjustment where it had been considered appropriate (in some cases the short-term has had to be used).

Table 4.2 sets out the trend rates used for each of the sectors. Where an adjustment to the trend rate of growth has been used, it had been reduced by either one half or one quarter (denoted in the table as, for example, '½ medium trend' where a rate of half the medium trend rate has been applied).

Table 4.2 – Scenario 1 Broad Sector and B-use Sector Trends

Broad sectors	Trend Used	
	2007-2011	2012-2026
Agriculture & fishing	Short trend	Medium trend
Energy & water	Short trend	½ short trend
Manufacturing	Short trend	½ short trend
Construction	Short trend	Medium trend
Distribution, hotels & restaurants	Short trend	Medium trend
Transport & communications	Short trend	Medium trend
Financial intermediation & business services	Short trend	Medium trend
Public administration, education & health	Short trend	½ medium trend
Other services	Short trend	¼ medium trend
B-Use Construction	Short trend	Medium trend
B-Use Distribution & wholesale	Short trend	Medium trend
B-Use Financial intermediation & business services	Short trend	Medium trend
B-Use Manufacturing	Short trend	½ short trend
B-Use Other services	Short trend	¼ medium trend
B-Use Transport & communications	Short trend	Medium trend

Scenario 2

Scenario 2 takes the final triangulated forecasts from the GLA¹⁶ and adjusts the level of increase in order to take account of self employment and those not requiring formal premises. The total change in employment as calculated by this adjusted mechanism is then applied to the current 2006 employment level in order to provide the total change in employment. The proportion of this change in employment attributed to B-use sectors takes into consideration the economic restructuring processes currently underway in the economy, resulting in an increase in the proportion of B-use sector employment in the Borough. In particular this takes into account the lessening effect of the contracting manufacturing sector. Similarly the distribution of employment across the B-use sectors takes account of economic restructuring and public policy. Over the first five years of the forecast, short-term trends are anticipated to drive changes to industrial structure. However, over the longer term, greater account has been given to the impact of economic restructuring and public policy.

Combined / Central Scenario

An unweighted average of the two scenarios has been taken in order to provide a central forecast, thereby allowing for a trade-off to be incorporated between the existing momentum in the economy and the successful implementation of public policy.

¹⁶ Given the aims of the study the capacity constrained forecasts, and therefore the 'triangulated' forecasts, have not been considered within the Scenarios. However they do provide important contextual information to the forecasts

4.3.4 Conversion of Employment to Employment Land

B-use jobs are converted into employment floorspace using employment densities. An employment density refers to the average floorspace per person in an occupied building and is therefore a measure of how much space each additional job will require. These densities are based primarily on guidance produced by English Partnerships¹⁷ but also take into consideration the densities used by the GLA for their site capacity forecasts.

The B-use employment floorspace requirements are converted into the associated employment land requirements using 'plot ratios'. Plot ratios provide a method for estimating the amount of employment land that will be required to be able to provide a particular level of floorspace. The lower the ratio, the less dense the development is. A plot ratio of one implies that, for example, 1,000 square metres of employment land will be needed to provide 1,000 square metres of employment floorspace. The plot ratios that we have used are based on guidance issued in the Employment Land Review Guidance¹⁸, but take into consideration the ratios used by GLA for their site capacity forecasts (see Section 1.3 GLA Forecasts).

Employment land refers to that which falls within the "B-Class" of the Town and County Planning (Use Classes) Order 1987 (the "UCO"). Specifically the UCO identifies the following categories for employment land within the "B-Class":

- *Class B1 – Business* - Use for all or any of the following purposes:
 - as an office other than a use within Class A2 (financial and professional services),
 - for research and development of products or processes, or
 - for any light industrial process,
- *Class B2 – General Industrial* - Use for the carrying out of an industrial process other than one falling within Class B1 above.
- *Class B8 – Storage or distribution* – Use for storage or as a distribution centre.
- *Other Sectors (see earlier)*

¹⁷ Employment Densities: A Full Guide; English Partnerships & the Regional Development Agencies (July 2001).

¹⁸ Employment Land Reviews: Guidance Note; ODPM (December 2004).

4.4 Atkins Projections

This section sets out the Atkins employment forecasts under each of the scenarios and translates these forecasts into a required level of employment floorspace and land, as described earlier in the Methodology section.

As the forecasts are based on straight line trend projections, the absolute employment change in each year is constant.

Table 4.3 – Atkins Employment Projections for the London Borough of Haringey

	2006	2016	2026	2006-2016		2016-2026		2006-2026	
	Employment			Annual growth (%)	Total change (number)	Annual growth (%)	Total change (number)	Annual growth (%)	Total change (number)
SCENARIO 1									
Total employment	61 002	61 664	65 282	0.1	662	0.6	3 617	0.3	4 280
B-use employment	31 543	28 435	27 698	-1.0	-3 108	-0.3	-737	-0.6	-3 845
B-use Construction	2 237	1 851	1 557	-1.9	-386	-1.7	-294	-1.8	-680
B-use Distribution & Wholesale	4 457	3 006	2 590	-3.9	-1 451	-1.5	-415	-2.7	-1 867
B-use Financial intermediation & business services	10 816	10 290	10 244	-0.5	-526	0.0	-45	-0.3	-572
B-use Manufacturing	4 559	2 202	1 366	-7.0	-2 357	-4.7	-836	-5.8	-3 193
B-use Other services	5 076	6 814	7 659	3.0	1 738	1.2	845	2.1	2 583
B-use Transport & Communications	4 399	4 273	4 281	-0.3	-126	0.0	8	-0.1	-118
SCENARIO 2									
Total employment	61 002	65 102	71 662	0.7	4 100	1.0	6 560	0.8	10 660
B-use employment	31 543	33 927	39 414	0.7	2 384	1.5	5 487	1.1	7 871
B-use Construction	2 237	2 364	2 759	0.6	127	1.6	395	1.1	522
B-use Distribution & Wholesale	4 457	3 958	4 927	-1.2	-499	2.2	968	0.5	470
B-use Financial intermediation & business services	10 816	13 487	18 328	2.2	2 671	3.1	4 841	2.7	7 512
B-use Manufacturing	4 559	2 788	2 365	-4.8	-1 771	-1.6	-423	-3.2	-2 194
B-use Other services	5 076	6 174	4 730	2.0	1 098	-2.6	-1 444	-0.4	-346
B-use Transport & Communications	4 399	5 156	6 306	1.6	757	2.0	1 150	1.8	1 907

COMBINED / CENTRAL SCENARIO									
Total employment	61 002	63 383	68 472	0.4	2 381	0.8	5 089	0.6	7 470
B-use employment	31 543	31 181	33 556	-0.1	-362	0.7	2 375	0.3	2 013
B-use Construction	2 237	2 108	2 158	-0.6	-129	0.2	50	-0.2	-79
B-use Distribution & Wholesale	4 457	3 482	3 759	-2.4	-975	0.8	277	-0.8	-698
B-use Financial intermediation & business services	10 816	11 888	14 286	0.9	1 072	1.9	2 398	1.4	3 470
B-use Manufacturing	4 559	2 495	1 866	-5.8	-2 064	-2.9	-629	-4.4	-2 693
B-use Other services	5 076	6 494	6 194	2.5	1 418	-0.5	-299	1.0	1 118
B-use Transport & Communications	4 399	4 715	5 294	0.7	316	1.2	579	0.9	895

Table 4.4 – Additional Employment and Associated Employment Floorspace and Land Requirements for London Borough of Haringey

B-use	Employment density (sqm per worker)	Net employment floorspace (sqm)			Plot ratio (ratio of land to floorspace)	Net employment land (hectares)		
		2006-2016	2016-2026	2006-2026		2006-2016	2016-2026	2006-2026
SCENARIO 1								
Office	19	4 348	7 005	11 353	3	0.2	0.4	0.6
Industrial	33	-75 127	-26 266	-101 393	0.4	-18.8	-6.6	-25.3
Warehouse	50	-40 510	-5 923	-46 434	0.4	-10.1	-1.5	-11.6
Total	-	-40 510	-25 185	-136 473	-	-28.7	-7.7	-36.4
SCENARIO 2								
Office	19	72 082	95 021	167 104	3	3.6	4.8	8.4
Industrial	33	-50 334	-14 494	-64 828	0.4	-12.6	-3.6	-16.2
Warehouse	50	1 601	33 416	35 017	0.4	0.4	8.4	8.8
Total	-	23 349	113 944	137 293	-	-8.6	9.5	0.9
COMBINED / CENTRAL SCENARIO								
Office	19	38 215	51 013	89 229	3	1.9	2.6	4.5
Industrial	33	-62 730	-20 380	-83 111	0.4	-15.7	-5.1	-20.8
Warehouse	50	-19 455	13 747	-5 708	0.4	-4.9	3.4	-1.4
Total	-	-43 970	44 380	410	-	-18.6	0.9	-17.7

4.5 Summary of Outputs

The three sets of forecasts developed and analysed above provide a range of potential employment growth paths for the London Borough of Haringey based on three different Scenarios which allows for an exploration of different influencing factors.

Scenario 1 provides the most constrained forecasts and is closely linked to historical employment trends. Scenario 2 allows for a higher rate of employment growth and assumes a degree of success in economic development policy implementation at both the local and regional level, most notably allowing the business and professional services sector to grow at above its trend rate. A final third scenario provides an unweighted average of scenarios 1 and 2, thereby providing a basic central forecast which takes into consideration recent trends and policy implementation.

The forecasts estimate that the rate of change in B-use employment will be between -0.6% per annum and 1.1% per annum over the next twenty years (2006 – 2026).

Under all three Scenarios the business services sector critical to the overall performance of the B-uses. As such the sector is subject to the greatest degree of economic testing and the forecasts provide a considerable range, with growth of between -0.3% and 2.7% per annum. Under all three of the Scenarios B-use growth is brought down by the performance of the manufacturing sector.

The performance of the services activities compared to industrial activities has implications for the B-use floorspace and employment land requirements.

Office space requires the highest level of employment floorspace, with the forecast level ranging from 11,000 to 167,000 square metres. There is also a requirement for net additional warehousing employment floorspace under Scenario 2.

When floorspace is converted into employment land, the relative proportion of the total required for office space is reduced due to the higher density at which such space is provided.

The scenarios indicate that demand for industrial land in the Borough is likely to continue declining which will facilitate the managed release of economically obsolete sites to alternative uses. However, at the same time, there is significant scope for economic diversification to take place in Haringey which is supported by a range of policy measures (e.g. at Central Leaside). This will require the upgrading and improvement of significant parcels of employment land in the Borough to facilitate the provision of good quality premises which can accommodate business and related services as well as some light industrial activities. In the main, this will require the provision of a range of good quality B1 premises suitable for a range of business sizes and types.

Consequently, we recommend that policy focuses on facilitating the restructuring of the Borough's employment land portfolio to allow an increase in B1 floorspace whilst enabling the managed transfer of obsolete industrial sites to alternative uses. We consider that Scenario 2 most closely reflects this approach. Balanced restructuring and stimulation of diversification is more likely to assist in stimulating sustainable economic growth compared to an approach which focused on a significant net increase or decrease in the total supply of employment land in the Borough. The need for an increase in the provision of good quality, flexible office space, particularly for small businesses is supported by the views of commercial property agents active in Haringey (See Section 5).

5. Property Market Trends

5.1 Introduction

In addition to the volume business survey, we conducted a series of qualitative interviews with commercial property agents active in Haringey. This includes a mixture of local firms as well as national and regional agents. The consultations ascertained the views of commercial agents regarding recent property market trends and prospects for demand and supply in the Borough. The findings of the consultations are summarised in this Section.

5.2 Marketing of B Use Class Properties

The agents consulted were actively marketing B class properties within Haringey. Commonly, the agents and the businesses inquiring about availability were most concerned with those properties in close proximity to the agents' offices. However, in general it was reported that the areas receiving the most inquiries were for premises in Tottenham Hale, Muswell Hill and Crouch End, particularly for higher quality office premises. Available industrial, small warehouse and small office premises can be found throughout the borough, particularly in Wood Green. Agents consider that Haringey provides a large range of sizes of office space.

The need for additional office premises suitable for small businesses within the borough is considered by agents to be significant. New developments, such as the Bounds Green mixed use scheme, are providing an important supply of good quality space for small and growing businesses.

5.3 Changes in Demand Conditions

Demand for Grade A office spaces within Haringey, particularly from blue chip companies, exceeds the limited supply. However, the majority of demand is for smaller industrial, warehouse and small office units (commonly measuring 2000 – 3000 sq ft) and also exceeds supply. Indeed, larger premises are known to have been split and rented as multiple smaller units in order to redress the persistent shortfall in the provision of smaller units.

It is expected that the limited supply of high quality, refurbished office space and increasing rent within the City and West End of London will cause an increasing number of occupiers to look to slightly more fringe, but well connected locations, such as Haringey. Demand is therefore likely to continue to exceed supply over the coming years. Additionally, if the financial market continues to slump, demand for smaller premises are expected to increase as businesses attempt to minimise costs.

5.4 Lease or Purchase Arrangements

Leasehold arrangements are popular within the Borough. The agents consulted generally observed one of two contradictory trends in Leasehold arrangements: some considered longer leases, especially those with a break clause, to be most popular as these often include better rates. However other agents considered shorter 2-3 year leases to be most popular due to the flexibility that they offer. However, with the increasingly unstable financial environment and property market, the future of which is difficult to predict, shorter leases are expected to increase in popularity.

5.5 Popular Business Activity

In the Borough as a whole, the agents considered demand for smaller offices to be higher than for larger offices. This supports the previously observed trend of a market in Haringey dominated by small start up companies. However, with the provision of higher quality larger office premises, as seen in Muswell Hill, blue chip companies also choose to locate in certain employment enclaves within Haringey.

5.6 Changes to Rents and Investment Yields

The cost of commercial premises strongly depends upon the size of the premise, its quality, location and function. Overall, rental values were found to range from around £8-£12/sq ft for industrial or secondary, poorer quality premises to around £20-£22/sq ft for better quality refurbished 1980s office space.

A short assessment of properties advertised on the EGi property webpages supports the rental values estimated by the consulted agents. Whereas leasehold office rental values were found to range from £12 to £25/sq ft, freehold office arrangements cost between £150 and £400/sq ft. Rental values of industrial properties were generally lower, most frequently between £5 and £10/sq ft. Freehold industrial arrangements varied significantly, from £85 to £200/sq ft depending on the type, size and quality of the industrial premises.

These rental values are significantly higher than those observed in 2004 and reflect rental value increases observed throughout Great Britain and particularly London. Average rental values are forecast to continue to rise in the forthcoming years, despite the current uncertainty within the financial markets.

5.7 Changes to Vacancy Levels

Demand for high quality commercial premises within Haringey is perceived to outstrip supply, and as such the vacancy levels of these properties are low. Vacancy levels of poorer quality premises are higher. However, most of the agents consulted had only one or two premises available within Haringey.

5.8 Future Development of B Class Property

The poor City and West End markets are expected to affect Haringey through an increase in demand for good quality, smaller premises with shorter, flexible leases. Supply of this type of building is considered to be insufficient for the perceived demand.

The concept of sustainability within office markets has gained popularity in the last few years, fuelled by regulatory change and an increasing desire for 'green' space within office developments. Therefore, if Haringey is to continue to develop as a desirable location for commercial activities, a sustainable approach to new developments and refurbishment and redevelopment programmes must be adopted.

5.8.1 Projected Changes in the Commercial Property Market as a Whole

When asked about the likely future of the commercial property market over the forthcoming years, the views of the consulted agents varied. The majority of agents considered the commercial property market in Haringey to have slowed, but not slumped, and predicted a relatively stable market continuing in the current situation for the foreseeable future, as the market recovers. However, one agent considered the non-core location of Haringey with respect to London to leave it more susceptible to falls in the capital value of the premises and predicted a more volatile commercial property market in the Borough over the forthcoming years.

The shortage of high quality office space in Haringey and London as a whole is expected to ensure that the commercial property market remains buoyant.

6. Business Consultations

6.1 Introduction

A survey of local businesses has been carried out with the principal objective of providing a significant empirical basis for assessing future business needs in the Borough, having particular regard to demand for employment land and premises. In accordance with ODPM/DCLG best-practice, the business survey provides an important strand of analysis used to supplement analysis provided by the analysis of secondary data sources.

This Section provides a summary of the survey findings whilst the full results are set out in Appendix B. Survey results are presented for two spatial areas: the 'Central Leaside area' and the 'Rest of the Haringey area'. The survey was structured in such a way in order to distinguish the issues relating to the Central Leaside area from the rest of the Borough. This is required to assist the Council in preparing its input to the preparation of the Central Leaside Area Action Plan (jointly with LB Enfield).

6.2 Methodology

6.2.1 Topics Researched

The key issues explored by the survey included:

- Employment information;
- Type of ownership;
- Size of premises;
- Land and premises requirements; and
- Future plans, including expansion and relocation.

6.2.2 Survey Process

The sampling units are defined as the local businesses and information was collected through a series of 15 minute interviews with 480 businesses located within Haringey of which 75 operate in the Central Leaside regeneration area. Interviews were conducted with owners, managers and directors.

6.2.3 Survey Sample Frame

The sample frame was constructed from the Experian business database. It is important to highlight that the sample frame included private sector business types only, who were considered likely to accommodate B-use class floor space based on the Atkins B-use definitions used in this report (see Appendix B).

The survey sample frame underestimates the total number of B-use businesses when compared to business unit data provided by the Annual Business Inquiry. The missing business records (the difference between the ABI information and the Experian information) could lead to selection bias in the survey. However, it is not considered that such bias will have any significant effect on the results of the survey and as such is not considered to be relevant.

The survey sample follows a stratified sampling design, whereby the heterogeneous business population is stratified into suitably homogenous groups, based on B-use sector, size of business and location of business. This design type allows for basic statistical analysis and generalisation of the survey results.

B-use Sectors

- B-use manufacturing;

- B-use construction;
- B-use distribution & wholesale;
- B-use transport & communications;
- B-use banking, finance & insurance; and
- B-use other services.

Business Size Bands

- Small (1 -10 employees)
- Medium (11 - 49 employees); and
- Large (50 + employees).

Sub-Regions

- Zone A – Central Leaside; and
- Zone B – Rest of Haringey.

6.2.4 Findings

The findings have been analysed by B-use sector and company size, as defined above, where appropriate. For the Central Leaside survey, some categories are combined due to low responses rates.

Results are only shown where the sample for the question exceeds 2 respondents. Suppressed results are stated as n/a. Even where results are shown it should be noted that, particularly for questions that were not asked to the entire sample population, the number of responses may be small and as such care should therefore be taken when interpreting the results.

6.3 Survey Sample

The survey was carried out with 75 businesses in the Haringey part of the Central Leaside area and 405 businesses from the rest of Haringey, representing nearly 7% of all B-use class businesses in the Borough. Table 6.1 sets out details of the survey sample in relation to the actual structure of B-use businesses (the sample frame).

Table 6.1 – Survey Sample Central Leaside Zone

	Total Businesses		Survey Interviews	
	Number ¹⁹	% of total	Number	% of total
By Sector				
Construction	C	C	6	8.0
Distribution & wholesale	63	37.5	21	28.0
Finance & business services	42	25	21	28.0
Manufacturing	39	23.2	21	28.0
Other services	C	C	2	2.7
Transport & communications	C	C	4	5.3
TOTAL	168	100	75	100
By Size				
Small (1 - 10 employees)	123	73.2	56	74.7
Medium (11 - 49 employees)	34	20.2	15	20
Large (50 + employees)	C	C	4	5.3
TOTAL	168	100	75	100

C = Confidential

Table 6.2 – Survey Sample Rest of Haringey

	Total Businesses		Survey Interviews	
	Number	% of total	Number	% of total
By Sector				
Construction	404	6.9	41	10.1
Distribution & wholesale	749	12.8	52	12.8
Finance & business services	2,885	49.3	195	48.1
Manufacturing	570	9.7	34	8.4
Other services	1,031	17.6	48	11.9
Transport & communications	216	3.7	35	8.6
TOTAL	5,855	100.0	405	100.0
By Size				
Small (1 - 10 employees)	5,449	93.1	352	86.9

¹⁹ C indicates confidential data. Under the 1947 Statistics of Trade Act, these figures should not be passed onto a third party.

	Total Businesses		Survey Interviews	
	Number	% of total	Number	% of total
Medium (11 - 49 employees)	321	5.5	44	10.9
Large (50 + employees)	85	1.5	9	2.2
TOTAL	5,855	100.0	405	100.0

Source: ABI, NOMIS and Atkins

6.4 Summary of Business Survey Results

The remainder of this Section summarises the findings of the business survey. The detailed results are provided in Appendix B.

6.4.1 Central Leaside Results

The majority of businesses in the survey are in the distribution & wholesale, finance & business services and the manufacturing sectors, whilst some 56% of the businesses are of small scale. Most of their employees live within 5 miles and their main customers' base is either in Haringey (26%) or the rest of London (57%). Out of the 75 respondents, 80% have not been affected by skills shortages, whilst the majority of the remaining identified the need for more skilled people.

More than half of the businesses (63%) have been established in Central Leaside for more than 5 years whilst a significant proportion of these (40%) have been in the area for more than 10 years.

Some 35% of the businesses have been operating from their current premises for the last 5 years, while more than half of the respondents have been in the same premises for more than 5 years. More than half of the respondents (54%) occupy their premises on a leasehold basis and 65% have 1-5 years remaining on their existing lease. Some 24% hold the freehold of their premises.

Average size of premises occupied is 2,034 square metres but this varies depending on sectors' specific needs.

More than three quarters of the businesses (79%) responded positively on the suitability of their premises and location. Only 3% found them unsuitable. Main reasons cited were the lack of car parking provision; premises being too old or in poor condition; and poor image of the site/premises.

Some 71% of the respondents are planning to keep their operation at the same scale, whilst 27% are planning to expand their businesses. Out of those 20 businesses who responded positively on expansion plans, some 85% would require an average additional floorspace of 704 square metres. Measures to provide the required additional floorspace include: refurbishment; redevelopment; and more intensive use of existing space.

The majority of the respondents (80%) would not consider relocation from their premises as an option. Those who do consider relocation, would stay within London and preferably in Haringey (47%). Preferred locations were Tottenham and other parts of North London.

Most of the respondents considered their current location as good and competitive for their business. Main reasons were their proximity to key suppliers and clients, and their access to the road network. On the other hand, factors that made their current location uncompetitive were the lack of suitable sites and premises; poor accessibility; lack of access to key clients/markets and poor environment and quality of life.

6.4.2 Rest of Haringey Results

The majority of employees live within a five mile radius of their job, whilst the proportion varies according to the size of businesses, with employees of smaller companies living closer to their work. More than three quarters of customers come from within Haringey (36%) and rest of London (46%).

When asked about any significant skills shortages affecting their business, most respondents (88%) highlighted that this was not of particular concern. Out of the 12% businesses where skill shortages were a constraint, the most affected were those related to skilled (47%); professional (32%); technical (28%); and semi-skilled (28%) occupations.

A third of the businesses have been established in Haringey for less than 5 years whilst some 43% have been operating more than 10 years in the area.

Some 42% of the businesses occupy their premises on a leasehold basis, whilst 36% of the respondents have been in their current premises between 1 and 5 years. Only 25% of the businesses work from freehold spaces.

Although the remaining length of lease varies across the sectors, for example businesses in construction have more time remaining on their leases compared to other services, the majority of businesses (56%) has up to 5 years remaining time till the expiry of their lease.

Overall, the levels of satisfaction with current premises are high, with 80% of surveyed businesses responding positively on the suitability of the occupied premises. The main factors contributing to premises not being entirely suitable for business needs include: site/premises too small (6.7%); the lack of car parking provision (4.7%); and road congestion (2.7%).

The majority of businesses (68.9%) plan to keep the same scale, and only 25.7% are considering expanding their current premises. Out of those planning to expand, 32.4% and 31.4% come from the manufacturing and transport and communications sector, respectively.

Around 68% of the businesses intending to expand will require additional floorspace. Measures to provide additional floorspace include: extension (13.5%); refurbishment (1.4%); redevelopment (8.1%); more intensive use of space (8.1%); and others (68.9%).

Some 5.4% of the total businesses surveyed are considering downsizing their business, with 27.3% of these leading to a need for reduced floorspace. Main reasons for downsizing their business are: efficiency savings (40.9%); reduced market (31.8%); retirement/closing (18.2%).

When asked about relocating their businesses, 77% of the respondents gave a negative response. Out of the remaining 23% that is considering relocation, 38.1% would consider remaining in the borough and 29.5% would consider a location within the rest of North London.

When asked about their preferences on specific type of location, 41.8% would prefer relocating in a town centre/commercial district and 24.2% in a dedicated industrial area. Preferences vary depending on the sector, thus 55.6% of manufacturing businesses would prefer a dedicated industrial location, whilst 48.8% of financial and business services would require premises in a commercial district.

Overall, the majority of surveyed businesses (85.9%) consider their current location to be good and competitive.

Total expansion requirements: survey based forecasts

Using data from the Annual Business Inquiry we can provide indicative estimates of the total number of B-use class businesses in Haringey by size. By extrapolating the sample results to reflect the total number of B-use class businesses, estimates can be provided of the gross expansion requirements of indigenous businesses in the Borough (see Table 6.3).

The method that has been used in order to calculate a forecast of future demand is based on only those respondents who considered that they would definitely be expanding and that they would need additional floorspace. The figures are then further analysed using data from the questions on floor space requirements and relocation. Further details are provided in Appendix B.

Table 6.3 – Total Expansion Requirements

Size of Business	Small	Medium & Large	Total
Method 1- lower level forecast	213,251 sqm	6,812 sqm	211,349 sqm
Method 2- upper level forecast	289,285 sqm	13,421 sqm	299,071 sqm

Source: Atkins

The survey based estimates of the expansion needs of indigenous business gives an indicative total floor space requirement of approximately 320,000 sqm. However, it is important to highlight that these estimates do not include potential closures and downsizing businesses. In addition, it is necessary to apply a high optimum bias ratio to the findings given the aspirational nature of responses to the expansion question. Applying an optimum bias ratio of 45% would have the effect of reducing expansion demand to a maximum of 135,000 sqm. This accords well with our projections of future employment and floorspace need.

7. Supply Update

7.1 Introduction

Following the findings of the 2004 study, this Section provides an update of employment land and premises supply in Haringey. The update is a desk-based assessment utilising Council development monitoring records and local knowledge of known changes provided by Council officers. Where available, up-to-date secondary sources have also been used.

In order to provide an input into the emerging joint AAP for Central Leaside, a separate analysis of supply is also provided for this part of the Borough.

It is important to consider the findings set out in this Section with the detailed site survey results contained in the 2004. It is not the purpose of this report to repeat the detail of the 2004 findings but to highlight key changes to the supply side situation in Haringey and subsequently provide a summary of headline supply factors. This has been sufficient to enable us to review our conclusions and policy recommendations in light of recent policy changes, current property market trends and updated projections of future employment floorspace need (see Section 8).

7.2 Key Changes

We have identified key changes to the employment land supply situation recorded in 2004 by having regard to:

- Adopted DEA designations as set out in the 2006 UDP;
- Loss of employment floorspace to other uses in DEAs, town centres and other employment sites (via interrogation of Council development control monitoring systems);
- Gain in employment floorspace in DEAs, town centres and other employment sites (via interrogation of Council development control monitoring systems);
- Findings of the North London Employment Land Study (2006); and
- Up-to-date ONS commercial and industrial floorspace statistics for Haringey.

Consideration has also been given to the UDP (2006) policies for Haringey Heartlands and Tottenham Hale and the Supplementary Planning Documents that have been prepared since 2004 in respect of Haringey Heartlands and Tottenham Hale. The implications of these policy documents have been taken into consideration in so far as future planning consents may have on the future supply of employment land at a number of key DEAs in the Borough.

Following interrogation of the Council's development control monitoring records, very few significant changes to the employment land supply situation have been recorded. In summary, these are set out below.

7.2.1 DEAs

- DEA1 (Ashfield Road, Seven Sisters) – removal of 1.64 ha from DEA designation in accordance with 2004 report recommendations (-5,970 sqm floorspace);
- DEA2 (Bounds Green Industrial Estate) – loss of existing D1 facility (non-residential institution) for construction of 4,200 sq m B1/B8 and 260 flats. Net gain of 4,200 B1/B8 sqm floorspace);
- DEA3 (Brantwood Road) – extension of existing B1 offices (net gain 98 sqm);
- DEA22 (Rangemoor Road, Herbert Road) – loss of 1,032 sqm B1 for development of 110 bedroom care home;

- DEA 8 (N17 Studios, 784-788 High Road) – removal of 1.8 ha from DEA designation in accordance with 2004 report recommendations (-6,862 sqm floorspace);
- Removal of Lawrence Road, Tottenham Green as DEA (4.07 ha);
- Removal of St Ann's, Seven Sisters Road as DEA (2.02 ha).

7.2.2 Other Employment Sites

- 20A Lordship Lane (2004 site ID 193) - loss of 0.009 ha for residential development (2 dwellings); and
- Land adjacent to Paxton Hall (2004 site ID 190) – Redevelopment of existing building for 1,830 sqm B1 workshop (net gain + 830 sqm B1).

Despite the relatively few significant changes that have been recorded, it is important to highlight that the Council's monitoring data are based on the GLA's London Development Database (LDD) which records planning permissions over the following thresholds:

- Loss of gain or new build of any residential units;
- 10 new bedrooms for hotels, hostels or residential homes; and
- 1,000 sqm or more of new floorspace in any other use class.

Consequently, the changes identified above will exclude relatively small developments that have taken place within the B use class (B1, B2 and B8). However, it is unlikely that such developments will have had a significant impact on the supply of employment floorspace in the Borough.

7.3 Supply Review

7.3.1 DEAs

Table 7.1 provides a summary of the key aspects of supply provided by DEAs designated in the 2006 UDP. This highlights a total land supply at DEAs amounting to approximately 131 hectares. This compares to a total estimate in the 2004 report of 144 hectares which is explained largely by our recommendations to remove obsolete or part-obsolete DEAs from Policy EMP1. This minor restructuring of DEA supply has been an important move by the Council to ensure that DEA designation is applicable only to land which is suitable for employment use. Consequently, these changes reflected by the 2006 UDP are in accordance with recent Government policy (e.g. SPG on Industrial Capacity) to facilitate the restructuring of supply in order to enable land which is assessed as unsuitable for employment use to be considered for alternative uses.

Table 7.1 – DEA (UDP 2006) Employment Land Supply

DEA No.	DEA Name	Area (ha)	Floorspace (sqm)
001	Crusader Industrial Estate, Ashfield Road	1.57	23,316
002	Bounds Green Industrial Estate	5.52	27,835
003	Brantwood Road	16.93	91,580
004	Campsbourne	0.55	3,280
005	Cranford Way	7.87	27,939
006	Friern Barnet Sewage Works	6.20	0
007	Hale Wharf	1.72	7,597
008	N17 Studios 784-788 High Road	2.10	10,391
009	High Road West	2.58	13,417
010	Lindens/Roseberry Works	1.32	8,266
011	Millmead and Ashley Road Extension	11.47	69,120
012	North East Tottenham	15.50	93,802
013	Queen Street	1.60	6,186
014	South Tottenham	9.12	98,574
015	Tottenham Hale	13.23	37,609
016	Vale Road/Tewkesbury Road	6.73	61,504
017	White Hart Lane	8.05	39,324
018	Willoughby Lane	1.10	9,538
019	Wood Green	12.11	64,585
020	High Road East	1.03	14,265
021	Marsh Lane	2.10	15,038
022	Rangemoor Road, Herbert Road	3.03	12,481
Total		131.43	735,647

Note: DEA areas measured on basis of boundaries defined by 2006 UDP. Floorspace figures based on 2004 report findings and adjusted in light of known changes and development control records 2004-2008.

In terms of floorspace supply, we estimate that the total provision of built B use premises in DEAs amounts to around 736,000 sqm. This compares well to Government estimates of commercial and industrial floorspace in the Borough (847,000 sqm) bearing in mind that the ONS estimates will include employment premises outside as well as inside DEAs. Table 7.2 provides these floorspace statistics by Middle Layer Super Output Area²⁰.

Having regard to measurements of vacant floorspace made as part of the 2004 study and adjusted in light of recorded changes since 2004, we estimate that collectively, the DEAs contain a total vacant floorspace amount of approximately 59,800 sqm. This equates to an average floorspace vacancy rate of 8% as at August 2008. This compares to our estimate of 10% provided in 2004 with the fall largely reflecting the removal of obsolete sites from DEA supply. Indeed, a vacancy rate of around 8% indicates a balanced property market with supply being well matched by demand. This is reinforced by the findings of our consultations with local property agents who consider that the supply of fit-for-purpose premises in Haringey is generally tight relative to demand (see Section 5). A vacancy rate of 8% generally is regarded as a 'frictional rate' whereby natural 'churn' and turnover in the take-up of premises are always present in generally buoyant markets. Furthermore, the availability of some unoccupied premises and developable employment land is essential to ensure a reasonable degree of choice for businesses and developers and to ensure that the market does not overheat.

²⁰ ONS defines three types of Super Output Areas (SOAs) for enabling analysis of small area statistics which are consistent with local authority boundaries: Lower Layer, Middle Layer and Upper Layer. Middle Super Output Areas (MSOAs) each have a minimum population of 5,000 with the average population size being 7,200. There are 36 MSOAs in LB Haringey.

Table 7.2 - B Use Class Floorspace (SQM) by Sub Area 2007

MSOA	Office Floorspace		Factory Floorspace		Warehousing Floorspace		Total	
	'000 SQM	% of Total	'000 SQM	% of Total	'000 SQM	% of Total	'000 SQM	% of Total
001	2	1.0%	4	1.4%	2	0.5%	8	0.9%
002	5	2.6%	61	22.0%	116	30.8%	182	21.5%
003	19	9.8%	25	9.0%	11	2.9%	55	6.5%
004	7	3.6%	13	4.7%	10	2.7%	30	3.5%
005	-	-	-	-	36	9.5%	36	4.3%
006	-	-	3	1.1%	-	-	3	0.4%
007	33	17.1%	-	-	-	-	33	3.9%
008	-	-	-	-	1	0.3%	1	0.1%
009	-	-	-	-	-	-	0	0.0%
010	-	-	-	-	-	-	0	0.0%
011	9	4.7%	4	1.4%	3	0.8%	16	1.9%
012	8	4.1%	-	-	-	-	8	0.9%
013	4	2.1%	-	-	-	-	4	0.5%
014	3	1.6%	-	-	-	-	3	0.4%
015	15	7.8%	38	13.7%	72	19.1%	125	14.8%
016	31	16.1%	14	5.1%	25	6.6%	70	8.3%
017	2	1.0%	-	-	-	-	2	0.2%
018	-	-	-	-	-	-	0	0.0%
019	1	-	6	2.2%	-	-	7	0.8%
020	4	2.1%	8	2.9%	-	-	12	1.4%
021	4	2.1%	-	-	2	0.5%	6	0.7%
022	0	0.0%	-	-	4	1.1%	4	0.5%
023	8	4.1%	1	0.4%	8	2.1%	17	2.0%
024	-	-	22	7.9%	-	-	22	2.6%
025	11	-	29	10.5%	42	11.1%	82	9.7%
026	3	1.6%	13	4.7%	-	-	16	1.9%
027	-	-	1	0.4%	1	0.3%	2	0.2%
028	-	-	-	-	-	-	0	0.0%
029	1	0.5%	-	-	-	-	1	0.1%
030	7	3.6%	-	-	3	0.8%	10	1.2%
031	-	-	-	-	9	2.4%	9	1.1%
032	-	-	31	11.2%	32	8.5%	63	7.4%
033	-	-	-	-	-	-	0	0.0%
034	-	6.2%	2	0.7%	-	-	14	1.7%
035	4	2.1%	2	0.7%	-	-	6	0.7%
036	-	-	-	-	-	-	0	0.0%
Total	193	100%	277	100.0%	377	100.0%	847	100.0%

Source: ONS, Commercial & Industrial Floorspace Statistics (2007)

In terms of vacant land in Haringey's stock of DEAs, discussions with Council officials and analysis of recorded changes at DEAs indicate that this element of potential supply has not changed significantly since 2004. Table 7.3 sets out our estimates of vacant land at DEAs. This shows a total vacant land supply of around 11.06 hectares of which nearly 60% is accounted for by a single undeveloped site (DEA 6 - Friern Barnet Sewage Works). Including DEA6, this represents a land vacancy rate of around 8% (or 3% when excluding DEA6). As for vacant premises, this frictional element of un-occupied land is important to maintain an element of choice for businesses and developers and to ensure that the market does not become over-heated.

Table 7.3 – DEA Vacant Land Estimates

DEA	Site Name	Vacant Land (ha)
DEA3	Brantwood Road	0.34
DEA6	Friern Barnet Sewage Work	6.21
DEA20	High Road East	0.2
DEA14	South Tottenham	0.38
DEA15	Tottenham Hale	0.92
DEA19	Wood Green	3.01
Total		11.06

Note: Vacant land figures based on 2004 report findings and adjusted in light of known changes and development control records 2004-2008.

North London Employment Land Study (NLELS)

As highlighted in Section 2 of this report, the NLELS was carried out in 2006 after the publication of Haringey's 2004 study. This study identified a total supply of employment land in the Borough of 133 hectares which is comparable to our estimates set out in Table 7.1. In terms of vacant or derelict land supply, the NLELS estimated this to be in the region of 13%. Whilst higher than the estimates provided in Haringey's 2004 report, it is important to highlight that some of these sites may have been removed from the DEA framework during the UDP adoption process. Moreover, definition factors may also explain the deviation. In particular, the 11.06 ha identified in Table 7.3 relates only to DEAs which we consider to be core employment land supply in the Borough and thus provides the most useful measurement in shaping future policy decisions.

The NLELS estimate of employment floorspace supply (939,000 sqm) is also broadly comparable with the evidence provided earlier in this Section.

7.3.2 Town Centre Employment Sites (2004)

Since the 2004 study was published, available evidence indicates that no significant change has occurred in the supply of employment sites in Haringey's six town centres (Wood Green, Tottenham, West Green Road, Green Lanes, Crouch End and Muswell Hill). We consider that our conclusions and recommendations for the town centre sites remain valid for informing emerging policy in Haringey. These findings and recommendations are summarised below.

The appraisal of town centres focused upon the assessment of areas of opportunity for redevelopment sites, vacant premises with potential for re-use for employment use and an audit of existing employment use sites not identified in the individual employment site appraisals (see below).

Wood Green

- Classified as a Metropolitan Town Centre, Wood Green provides a range of services and represents a major concentration of economic activities and employment in the Borough.
- Existing employment uses are typically accommodated in B1 offices occupying first/second floors of 3 storey terraces with A1 use below.
- Within the town centre, there are a small number of underutilised areas. Typically, these currently are used by single storey retail occupiers. These sites offer potential opportunities for redevelopment at a higher density to include B1 office/studio type uses and some residential development.
- There are a number of vacant units for employment use concentrated at the southern end of the town centre. These consist of first and second floor units above A1 use and have potential for re-use for employment.
- Wood Green is well served by public transport (PTAL score 6) making it an appropriate location for office development.

Tottenham

- Primarily a centre for convenience retailing and service provision.
- The number and range of B use employment sites and premises within the town are limited. However, in addition to retail units (A1) notable employment in the town centre is provided by professional services including solicitors and accountants. Typically, these businesses occupy first floor offices above retailers.
- There are pockets of opportunities for redevelopment particularly concentrated towards the north of the town centre on Tottenham High Road.
- Tottenham High Road is characterised by areas of lower density development consisting largely of single storey premises. These sites represent potential opportunities for redevelopment at higher densities similar to neighbouring properties. A range of employment or residential uses could be accommodated on the upper floors.

West Green Road

- The smallest of the district town centres including a large concentration of convenience retailing. Typical use class is A1 at ground level with residential above.
- Units above the Seven Sisters indoor market are vacant or derelict with limited potential for employment use. The site has potential redevelopment opportunity at higher density such as B1 office use or a mixed use scheme. Indeed, in November 2008, planning consent was given for a mixed-use scheme for this area (Wards Corner).

Green Lanes

- This linear town centre comprises almost solely of independent retailers with few employment uses.
- There are a number of vacant first floor units which are suitable for re-use for employment purposes.

Crouch End

- There is strong representation of A3 occupiers with a high concentration of bars and restaurants located in and around the Broadway.
- There are a small number of offices within the town centre occupying the first floor units of three storey blocks.
- There is very limited potential for redevelopment or re-use of existing premises for employment use within the town centre.
- All employment sites within Crouch End have a PTAL score of 3. This is relatively low for a town centre and is due to a lack of underground or mainline station.

Muswell Hill

- Characterised by three or four storey Edwardian terraces with A1 use at ground level and residential above. There are very few B use class premises in the town centre.
- A limited number of redevelopment opportunities exist where single storey premises in A1/A3 use could be more intensively utilised through higher density development.
- Muswell Hill is the least accessible town centre in Haringey by public transport.

7.3.3 Town Centre Employment Site; Proposals

Key opportunities for employment use in Haringey town centres were limited to a small number of sites and premises which could be considered for redevelopment, intensification and re-use. These proposals for change are summarised below. The objective for developing the following

opportunities had been identified as strengthening the role of the Borough's town centres including the provision of appropriate office and service units, residential uses and retail.

Wood Green

- Redevelopment opportunities for a limited number of town centre employment uses (identified in Figure 4.2 of 2004 report). Planning permission has been granted for 90 flats and mixed use at Site 251 (identified in 2004 report).
- Redevelopment / intensification of three single storey retail sites for retail, offices and residential (Figure 4.2 of 2004 report).
- Re-use of vacant premises (above retail units) for employment use at the southern end of the town centre (Figure 4.2 of 2004 report).

Tottenham

- Redevelopment for mixed use at a limited number of town centre sites (Figure 4.3 of 2004 report).
- Redevelopment / intensification for employment and /or residential use on upper floors (Figure 4.3 of 2004 report).

Other Centres

- *West Green Road:* Re-development of vacant site to the east of the Centre and redevelopment of Seven Sisters indoor market for offices or mixed-use scheme (Figure 4.4 of 2004 report). As highlighted above, the Wards Corner site recently received planning permission for a mixed-use scheme.
- *Green Lanes:* Re-use or redevelopment of vacant first floor units on Salisbury Promenade: (Figure 4.5 of 2004 report).
- *Crouch End:* Re-use / refurbishment and or redevelopment of limited number of vacant units. These include 72-96 Park Road where planning permission has been granted for 9 flats..
- *Muswell Hill:* Redevelopment / intensification of single storey retail units along Muswell Hill Broadway and Fortis Green Road with potential for for mixed uses (Figure 4.7 of 2004 report).

7.3.4 Other Employment Sites

As with employment sites in Haringey's town centres, there is minimal evidence to indicate that any significant changes have occurred in respect of other employment sites in the Borough. We consider that the 2004 findings and recommendations for this element of Haringey's employment land supply remain valid. These are summarised below.

The appraisal of existing individual employment sites comprised two stages: a desk top assessment and site appraisals. In total 144 individual employment sites were surveyed, equating to some 16.6ha. A summary of key findings is outlined below.

Several concentrations of other employment sites within the Borough were identified as being located in the following areas:

- Within the area bounded by Green Lanes, Phillip Lane and Tottenham High Road and St Anns Road;
- Crouch End – Hornsey;
- Bounds Green;
- Wood Green;
- Green Lanes; and
- Tottenham High Road.

Of the 144 sites identified, there were a total of 339 premises, the majority located on small sites of less than 0.2ha in area. . Approximately 83% of the sites were identified as operational with 10% being vacant/unoccupied and 7% derelict (see Table 7.4).

Table 7.4 – Summary of Site Status (Other Employment Sites / Non DEA or Town Centre)

Status of Site	No.	%
Operational	119	82.64
Vacant/Unoccupied	15	10.42
Derelict	10	6.94
Total	144	100

In terms of use class, the sites are spread relatively evenly. The majority of sites fall within B1, B2 B8 and Sui Generis as outlined in Table 7.5.

Table 7.5 – Summary Use Class (Other Employment Sites / Non DEA or Town Centre)

Use Class	No.	%
B1	40	22.73
B2	39	22.16
Mixed Use	12	6.82
Sui Generis	44	25
B8	41	23.3
Total	176	100

Table 7.6 provides a summary of the vacant and derelict sites and opportunities for future change. The analysis assumed that each site could have more than one potential role. It should be noted that potential roles identified for sites are indicative only and are subject to feasibility and viability testing on a site-by-site basis.

The most common form of potential which exists at existing vacant/derelict sites was potential for redevelopment for non-employment uses (63% of vacant/derelict sites). This is primarily due to the location of 'other employment sites' within existing residential areas. Potential re-use or redevelopment for employment uses was identified as a potential option at 13% and 17% of vacant/derelict sites.

Table 7.6 – Assessment of Potential – Vacant & Derelict Sites

Assessment of Potential – Opportunities for Change	No.	%
Potential for accommodating further employment premises/site intensification	0	0
Potential for re-use of existing premises for employment use	4	13.33
Potential for site re-development (for employment uses)	5	16.67
Potential for diversification/introduction of ancillary non employment uses	2	6.67
Potential for redevelopment for non employment uses	19	63.33
Total	30	100

7.3.5 Other Employment Areas - Proposals (2004)

The 2004 report provided an appraisal of 144 other employment sites, located outside DEAs. The assessment recommended:

- redevelopment for non-employment, particularly residential uses represented the greatest opportunity for the majority of vacant and derelict sites(63%). Redevelopment for residential use was also the major opportunity presented by occupied sites (42%). This reflected the location of many other employment sites in residential locations.

- approximately 30% of vacant/derelict sites and 48% of occupied other employment sites provide opportunities for re-use or redevelopment for employment uses;
- only a negligible number of other employment sites are suitable for the provision of additional employment floorspace through intensification. This reflects the small size of most sites and the lack of extension land; and
- only 2% of vacant / derelict sites and 8% of occupied sites are suitable for the introduction of ancillary employment generating uses.

7.3.6 Overview: Town Centre and Other Employment Areas (2004)

In meeting an element of local demand, it is important to retain a significant proportion of 'other employment sites.' However, many of these should be considered for redevelopment for employment uses with a view to improving the quality of premises and the operating environment.

With regard to the Borough's town centres, we recommended that a limited number of sites within them could be considered for redevelopment and intensification for both offices and mixed-uses, with schemes reinforcing the retailing and service role of the town centres.

A significant proportion of other employment sites no longer meet modern employment needs and are unsuitable in locational terms. These small sites should be considered for redevelopment for housing and/or mixed use. However, it is important that these sites are distinguished from others in residential locations which continue to perform an important local employment role and meet the property requirements of small businesses.

7.4 Central Leaside Employment Land Supply

The Haringey element of the Central Leaside area currently contains four DEAs, namely:

- Brantwood Road (DEA 3);
- Willoughby Lane (DEA 18);
- North East Tottenham (DEA 12); and
- Marsh Lane (DEA 21).

Collectively, these DEAs provide a total land area of approximately 36 ha (see Table 7.7).

Table 7.7 – Employment Land Supply in Central Leaside (LBH)

DEA	Size (ha)	Total Floorspace (Sqm)
Brantwood Road (DEA 3)	16.93	91,580
North East Tottenham (DEA 12)	15.5	93,802
Willoughby Road (DEA 18)	1.1	9,539
Marsh Lane (DEA 21)	2.1	15,038
Total	35.66	209,959

We estimate that the LBH element of the Central Leaside area provides 27% of Haringey's total employment land supply (131 ha). In terms of employment floorspace, its contribution is around 25% (from a total of 847,000 sqm). Whilst the employment contribution is not as substantial (10% of the Borough's total B use employment), the area clearly provides an important role in the Haringey economy. This includes the provision of jobs in a location which can be readily accessed by some of the Borough's most economically deprived communities. The fact that the employment contribution is lower than the land and premises contribution reflects the nature of activities in the Central Leaside area. In particular, the area is not a prevalent location for offices which typically display a significant higher ratio of jobs to land area / floorspace compared to industrial and warehousing activities.

Based on 2004 survey work, approximately 11% of floorspace (22,200 sqm) in the study area is vacant). Despite perceptions of Central Leaside being characterised by a high degree of vacancy, this level is reasonably acceptable in terms of frictional turnover in the property market. Moreover, as highlighted earlier, active property agents in the area generally report a shortage of available premises in Haringey (including Central Leaside). Despite this, it is important to emphasise that within the Central Leaside area, there is a potential need for some improvement in the quality of supply in the area.

Since the original employment study was completed in 2004, there has been no recorded loss of employment land and premises in Central Leaside to other uses. The key change related to the construction of an extension to an existing B1 unit at DEA 3 (Brantwood Road). This resulted in a net increase of approximately 100 sqm B1 floorspace.

7.5 Haringey Heartlands and Tottenham Hale

Haringey UDP policies for Haringey Heartlands and Tottenham Hale potentially impact on 5 of the 22 DEAs. In Haringey Heartlands the provision of new employment opportunities will be required to achieve balance and a sustainable community. The Council considers this balance to be an essential element of the comprehensive development of the area. For Tottenham Hale, in 2007, the Council approved a major planning application identified as 'Hale Village' for one of the plots (GLS site) identified in the Tottenham Hale Urban Centre SPD area. This is a mixed use proposal which includes around 15,400 sqm of retail, health, hotel, school and creche. and 3,200 sqm of B1 uses. Whilst the employment premises potentially delivered by the scheme are likely to represent a significant upgrade in quality compared to existing premises, the emphasis on promoting mixed-use development is likely to result in the changes to defined employment land supply. The extent to which these changes will have a significant impact on the quantity and quality of future supply of employment land and premises will largely depend on the degree to which new employment activities make more intense use of existing brownfield land.

8. Conclusions and Recommendations

8.1 Introduction

This Section summarises the findings of the employment study update and sets out our policy recommendations. It seeks to supplement the conclusions and recommendations of the 2005 report having regard to available up-to-date information and recent changes in national and regional policies.

8.2 New Policy Context

Reflecting the ethos of Draft PPS4, it will be important for LDF employment policies to promote a proactive and positive approach to planning for economic development. Moreover, it will be important for flexibility to be built into policies by not placing significant restrictions on the type of employment use that is permitted on most allocated sites.

The February 2008 London Plan (Consolidated with Alterations since 2004) revised London's sub-regional planning framework. Indicative employment growth projections have been provided for the north sub-region, which amount to 285,000 additional jobs over the period 2006-2026 (14,300 per annum). Haringey has a role in making a contribution to this target. Priorities for the North London sub-region highlighted by the London Plan include:

- optimising the development of Opportunity Areas and Areas of Intensification (including Brent Cross / Cricklewood, Tottenham Hale, Upper & Lower Lee Valley (part), Colindale, Haringey Heartlands and Mill Hill East);
- managing the re-use of surplus industrial land; and
- delivering the London element of the London-Stansted-Cambridge-Peterborough Growth Corridor.

The London Plan also highlights the need for local authorities to ensure adequate provision is made for SMEs given the anticipated role of these businesses in accommodating future growth of employment outside Central London.

In terms of the Mayor's recently issued SPG on Industrial Capacity, the Guidance highlights that approximately 187 ha of surplus industrial land in the North sub-region should be released to other uses in the period 2006-2026. Despite the projected net loss of industrial land arising from the expected fall in demand for general industrial and manufacturing activities, the SPG highlights that demand in North London and Haringey will increase for logistics / warehousing, waste and recycling facilities and transport related functions. In shaping future LDF employment policies, it is important to highlight that the SPG does not consider office-based (B1) activities which is the sector where most employment growth is likely to take place over the plan period.

The SPG places Haringey in the 'limited transfer' category which is the middle of the three transfer classifications. This classification aims to encourage local authorities (including Haringey) to manage, and where possible, reconfigure their portfolios of industrial land, safeguarding the best sites and phasing the release of industrial land to reduce vacancy rates towards the London-wide frictional rate of around 5%.

Whilst the SPG highlights that SILs represent the core reservoir of industrial land in London, it also emphasises the need for local authorities to identify Locally Significant Industrial Sites (LSIS). Tottenham Hale and Wood Green (part) are allocated as SILS / Industrial Business Parks which can accommodate businesses requiring a high quality environment. Parts of Central Leaside are also identified as SILs. Like the SILs, the LSIS should be protected for a range of industrial uses.. Moreover, it will be important for the LDF to identify its portfolio of LSIS. The SPG sets out the criteria which should be applied by local authorities to identify LSISs.

The SPG highlights that provision of mixed-use development in LSISs is not a primary aim. Whilst mixed-use may not be completely excluded in LSISs, such proposals must be supported by policies contained in the London Plan (Consolidated with Alterations): for example, in close proximity to public transport hubs and peripherally located and dysfunctional parts of industrial sites).

In planning for the release of industrial land, the SPG highlights that most surplus land will be on smaller sites outside SILs and LSISs.

The North London Employment Land Study (NLELS) highlighted that Haringey is characterised by an ageing stock of industrial and warehousing premises. Despite this, the majority of premises in the Borough were classified as being in good or reasonable condition. With an estimated vacant land rate of 13%, the report projects that net demand for employment land in Haringey will be up to -14ha for the period 2001-2016.

The London Office Policy review identified modest demand for office premises in Haringey. This is estimated at around 70,000 sqm for the period 2006-2026.

The Issues and Options report for the Central Leaside Joint Area Action Plan highlights the strategic importance of the area for employment (LB Enfield and LB Haringey). However, it emphasises that the dominance of manufacturing and warehousing activities in the area makes it vulnerable to employment decline. In the context of increasing demand for knowledge-based, service sector and high technology activities, the report emphasises the need for restructuring the offer of the area as a business location. Three options are posed for the future of Central Leaside:

- Reinforcing the existing employment function;
- Taking a pro-active approach to upgrading employment activities (to accommodate higher value businesses) and developing niche sectors; or
- Transforming the area through intensification and mixed-use which would introduce non-employment uses alongside higher value employment activities.
- Parts of Central Leaside fall within the designation of Strategic Industrial Land, and London Plan policies and the Mayor's SPG on Industrial Capacity will be a key consideration in developing the future options.

8.3 Economic Context

Haringey's economy is dominated by employment in three key broad sectors which together account for over 80% of employment, namely:

- Public administration, education and health
- Distribution, hotels & restaurants
- Banking, finance and insurance

Manufacturing employment in Haringey continues to decline. Indeed, this decline is more pronounced in Haringey than in London or Great Britain. Consistent with Advice set out in the Mayor's SPG on Industrial Capacity, this may indicate that restructuring within the Borough's economy has not yet levelled out and that consideration should be given to the potential transfer of obsolete industrial land to other uses. Haringey's relative strong representation in the manufacturing sector compared to other areas reflects the presence of significant strategic industrial areas in the Borough. However the LDF should consider means of balancing the needs of competitive industrial and manufacturing activities with service and warehousing sectors with significant growth potential.

Whilst the 'banking, finance and insurance' sector continued to grow at the same rate as London, this sector remains underrepresented. However, the growth rate for Other Services employment has been much faster than for London and Great Britain and the Borough is overrepresented in this sector, as it is for public sector activities. These two sectors accounts for half of all B-Use employment in the Borough, up from 39% since 1996. In line with strategic economic trends, it is

likely that a high proportion of employment growth in the Borough will be accounted for by the business and related services sector. Consequently, it will be important for future employment land policies in Haringey to facilitate the provision of a portfolio of sites which is sufficient to meet the needs of a wide range of business services. A high proportion of these businesses will be SMEs, many of which will be constrained by the need to find good quality premises in cost effective locations.

The Haringey part of the Central Leaside AAP area accommodates approximately 3,000 jobs which represent over 35% of total jobs in the area as a whole (including LB Enfield). Despite the dominance of manufacturing, warehousing and distribution employment in the area (around 55%), over 600 jobs are found in business service activities (20%). This highlights the potential to increasingly diversify the economy of the Central Leaside area along with a focus on supporting competitive light industrial and distribution activities.

8.4 Future Employment & Property Needs

Interviewed with commercial property agents active in Haringey highlighted that the majority of demand for office and industrial premises is concentrated in Tottenham Hale, Muswell Hill, Crouch End, Wood Green and the Central Leaside industrial estates.

It was reported that there is a significant need to provide more good quality office and industrial space for small businesses throughout the Borough. In meeting a component of this demand, some property owners have split relatively large premises into smaller units (around 250 sqm). Agents also consider that there is likely to be increased demand for office accommodation in Haringey arising from businesses relocating from Central London.

Having independently assessed the GLA's employment forecasts, Section 4 of this report sets out our revised quantitative estimates of future floorspace need for the period 2006-2026. Our preferred (policy-driven) projection compares well to the GLA's estimates which indicate a total floorspace requirement of approximately 137,000 sqm for the period 2006-2026. This includes a net reduction in demand for industrial /B2 floorspace of around 65,000 sqm as well as a modest net increase in B8 of 35,000 sqm.

The preferred scenario represents an increase of around 15% in the stock of B use class floorspace in the Borough during the period 2006-2026. We consider that this scenario is the most appropriate for Haringey, given measures being taken to diversify the local economy and to introduce more higher-value activities to the Borough.

The majority of demand will be for B1 floorspace (167,000 sqm gross) including light industrial / B1c. Much of this demand will originate from small businesses as highlighted by discussions with property agents. A small but significant increase is projected for B8 premises given growth in demand for good quality logistics, warehousing and storage facilities. Moreover, Haringey benefits from a strategic location which is suitable to these types of operators.

Our preferred scenario reflects a strategy which balances economic restructuring and diversification. Whilst it allows for the transfer of obsolete industrial sites made available through contraction in the manufacturing sector, it also embraces a growth in demand for businesses which will require good quality office and light industrial premises. Despite projected growth in demand for B1 floorspace, these businesses typically occupy land at significantly higher densities compared to B2 and B8 activities and therefore place less pressure on the supply of land (at least in quantitative terms).

The business survey reinforced the findings of our assessment of future employment floorspace demand. It highlighted that a significant proportion of businesses in Haringey are well established in the Borough and typically employment workers to live locally. Around 25% of existing businesses are intending to expand their use of floorspace. Extrapolating the sample findings to represent all B use class businesses in the Borough, the survey indicates that expansion demand could be up to 300,000 sqm (gross). However, it is important to highlight that these estimates do not include potential closures and downsizing businesses. In addition, it is necessary to apply a high optimum bias ratio to the findings given the aspirational nature of responses to the expansion

question. Applying an optimum bias ratio of 45% would have the effect of reducing expansion demand to a maximum of 135,000 sqm. This accords well with our projections of future employment and floorspace need.

8.5 Supply Update

Following a desk-top review of completed planning consents since 2004, Section 7 of this report provides an update of the supply of employment land and premises in Haringey. This takes into account the recommendations that were made in the 2004 report regarding changes to DEA and other employment land allocations and designations that were adopted in the 2006 UDP.

This review demonstrated only minor changes have taken place in respect of the supply position in Haringey. The Borough's supply of employment land and premises is summarised below:

- Collectively 22 DEAs in Haringey cover 131ha of employment land and around 736,000 sq.m. of B use floorspace;
- Vacant land in DEAs amounts to 11.06 ha which represents 8% of DEA employment land supply in the Borough (3% when excluding the undeveloped Friern Barnet Sewage Works – DEA 6);
- Vacant floorspace amounts to approximately 59,800 sqm which resembles a vacancy rate of 8%. We consider this to be a frictional rate of vacancy which reflects a reasonably healthy market where demand and supply are largely in balance. This is reinforced by findings of consultations with local property agents who indicated that, on the whole, the supply of fit-for-purpose business premises in the Borough is tight relative to supply. Some degree of vacant land and premises is important to ensure the market functions efficiently by allowing an element of natural market 'churn' as well as choice for businesses seeking premises;
- In the Haringey element of the Central Leaside area, total land supply amounts to 36 ha and 210,000 sqm of B use class floorspace. Central Leaside (LBH) contributes around 27% of Haringey's total employment land supply which indicates the importance of the area's role in the local economy. Whilst we consider that Central Leaside should continue to provide a location for competitive industrial and warehousing activities, there is an opportunity for the area to increasingly diversify and modernise its business base. Promoting targeted intensification, upgrading and redevelopment in the area for continued employment use will be central to achieving this diversification.
- Haringey's UDP categorises Haringey Heartland and Tottenham Hale as Regeneration area DEA which promote mixed use developments. This is highlighted by the Haringey Heartlands Development Framework and Transforming Tottenham Hale Urban Centre master plan SPD. In implementing the policy framework for mixed used development at these locations, it is important to ensure improvement in quality of premises made available at these locations alongside diversification and intensification of employment activities. Other existing DEAs should have strong protection to ensure choice and flexibility within the employment land market in Haringey and North London.

8.6 Demand Supply Balance

As previously highlighted, our preferred (policy-driven) estimates of future employment floorspace need in Haringey amounts to around 137,000 sqm (net) for the period 2006-2026 (see Section 4). Excluding town centre and other employment sites, this compares to an identifiable theoretical capacity of around 104,000 sqm made up as follows:

- 60,000 sqm vacant floorspace; and
- Approximately 44,000 sqm from development of 11 ha of vacant land in DEAs (assuming an average plot ratio of 40%)²¹.

²¹ 11 ha = 110,000 sqm (land) x 40% plot ratio = 44,000 sqm.

Whilst there is a relatively small quantitative shortfall in supply relative to projected demand, we do not consider it is necessary at this stage to allocate additional employment sites. This partly reflects the fact that an element of future supply has been excluded from the quantities stated above (ie. town centre and other employment sites). Of particular importance, however, will be the effect of economic restructuring which is likely to see the re-use and redevelopment of land at higher densities relative to declining activities in the manufacturing sector. In facilitating this restructuring / economic diversification approach, it will be essential for the Council to adopt policies which strongly encourage the intensification and improvement of existing employment areas (particularly DEAs). Given the limited amount of readily available supply relative to future demand, justification remains for pursuing a strong approach to safeguarding existing employment clusters for business and industrial use. In doing so, it is important for designations and supporting policy text to reflect up to date policy considerations including the Mayor's SPG on Industrial Capacity.

With regard to town centre and other employment areas, we recommend that the Council considers criteria guided by the Mayor's SPG to identify Locally Significant Employment Locations. We consider that such a designation should be used for both industrial and office sites and premises. The 2004 report set out our recommendations for potential change of town centre and other employment areas. This included an assessment of sites that were fit for purpose and should be retained for employment use. We also identified sites where re-use, redevelopment or other improvements should be targeted to ensure that these sites remained suitable for employment use. Sites were also identified which we considered were no longer suitable for employment use and should be assessed in respect of their potential for other forms of development.

Overall we recommend that the DEAs designated in the 2006 UDP are strongly protected to provide choice and flexibility in employment land. This principle should also be applied to the majority of town centre and other employment sites although the potential for mixed-use development should be considered in appropriate circumstances where such proposals will significantly improve the quantity and/or quality of jobs that will be made available.

8.7 Central Leaside

The Haringey element of the Central Leaside area performs an important economic role not only locally but for the Borough as a whole. Whilst the whole Central Leaside area is characterised by some traditional industries in decline and a range of lower quality premises, the evidence suggests that the Haringey element is performing relatively well as an employment location. For example, existing businesses consider it a good and competitive location for their purposes, land and premises are well utilised and vacancy rates are acceptable. However, there exists the potential opportunity to improve the image parts of the area to a wider range of employment activities (including some B1 uses).

In summary, our recommendations are as follows:

- The employment role of the Haringey element of Central Leaside should be strongly protected for this purpose.
- A strategy aimed at retaining existing viable businesses should be combined with efforts to diversify the mix of businesses in Central Leaside. The latter should focus on attracting a range of growth industries, particularly in the industrial and warehousing sectors. However, this should not be to the exclusion of B1 premises which may be suitable for a range of office and light industrial activities (particularly small businesses).
- In order to help diversify the economic role of Central Leaside and to improve the prospects for employment growth in the area, policies should assist in rejuvenating out-dated and increasingly obsolete building stock. Whilst whole scale regeneration / redevelopment are not considered appropriate, targeted intensification, improvement and redevelopment should be pursued as part of the AAP. This should include specific elements within each of the DEAs although for Marsh Lane, there is a case for more comprehensive improvement.

Appendix A

A.1 Definition of B-Use Activities by Standard Industrial Classification

Table A.1 – B-use class activities

B-Use Class	Activities
Banking, finance & insurance	65 : Financial intermediation, etc
	66 : Insurance and pension funding, etc
	67 : Act auxiliary financial intermediation
	70 : Real estate activities
	71 : Renting machinery/equipment, etc
	72 : Computing and related activities
	73 : Research and development
	74 : Other business activities
Construction	45 : Construction
Distribution & wholesale	50 : Sale, maintenance/repair motor vehicles
	51 : Wholesale trade/commission trade, etc
Manufacturing	15 : Manuf food products and beverages
	16 : Manuf tobacco products
	17 : Manuf textiles
	18 : Manuf apparel;dressing/dyeing fur
	19 : Tanning/dressing of leather, etc
	20 : Manuf wood/products/cork, etc
	21 : Manuf pulp, paper and paper products
	22 : Publishing,printing,repro recorded media
	23 : Manuf coke, refined petroleum products
	24 : Manuf chemicals and chemical products
	25 : Manuf rubber and plastic goods
	26 : Manuf other non-metallic products
	27 : Manuf basic metals
	28 : Manuf fabricated metal products, etc
	29 : Manuf machinery and equipment nec
	30 : Manuf office machinery and computers
31 : Manuf electrical machinery/apparatus nec	
32 : Manuf radio, tv/communications equipment	
33 : Manuf medical, precision instruments, etc	
34 : Manuf motor vehicles, trailers, etc	

	35 : Manuf other transport equipment
	36 : Manuf furniture; manufacturing nec
	37 : Recycling
Other services	90 : Sewage/refuse disposal, sanitation, etc
	91 : Activities membership organisations nec
	92 : Recreational, cultural and sporting
Transport & communications	60 : Land transport; transport via pipelines
	61 : Water transport
	62 : Air transport
	63 : Supporting/auxiliary transport,etc
	64 : Post and telecommunications

Table A.2 – Industrial sector activities

Sector	SIC (1992)	Activities
Manufacturing	15.11 – 37.20 (excluding 22.11 - 22.15)	Includes all manufacturing as detailed under the B-Use classification table, but excludes publishing
Some construction	45.33 – 45.45	Plumbing
		Other building installation
		Plastering
		Joinery installation
		Floor & wall covering
		Painting & glazing
		Other building completion
Motor vehicles activities	50.20, 50.40	Maintenance & repair of motor vehicles
		sale, maintenance & repair of motor cycles & related parts & accessories
Sewage & refuse disposal	90.00	Sewage & refuse disposal
		Sanitation & similar activities

Table A.3 – Warehouse sector activities

Sector	SIC (1992)	Activities
Freight transport by road	60.24	Freight transport by road
Cargo handling	63.11	Cargo handling
Storage & warehousing	63.12	Storage & warehousing
Other supporting land activities	63.21	Other supporting land activities
Post & courier activities	64.11 – 64.12	National post activities
		Courier activities
Wholesale	51.11 – 51.70	All wholesale activities

Appendix B

Business Survey Findings

B.1 Business Survey Findings

B.1.1 Introduction

A survey of local businesses has been carried out with the principal objective of providing a significant empirical basis for assessing future business needs in the Borough, having particular regard to demand for employment land and premises. In accordance with ODPM/DCLG best-practice, the business survey provides an important strand of analysis used to supplement analysis provided by the analysis of secondary data sources.

This report sets out the detailed tables and a summary of the findings of the business survey and is presented as an appendix to the main study report. Results are shown for two spatial areas: the 'Central Leaside area' and the 'Rest of the Haringey area'.

The report is structured into the following Sections:

- Methodology
- Survey sample details
- Summary of business survey results
- Total expansion requirements: survey-based forecasts
- Full survey results: data tables

B.1.2 Methodology

Topics Researched

The key topics researched included:

- Employment information;
- Type of ownership;
- Size of premises;
- Land and premises requirements; and
- Future plans, including expansion and relocation

B.1.3 Survey Process

The sampling units are defined as the local businesses and information was collected through a series of 15 minute interviews with 480 businesses located within Haringey of which 75 operate in the Central Leaside regeneration area. Interviews were conducted with owners, managers and directors.

B.1.4 Survey Sample Frame

The sample frame was constructed from the Experian business database. It is important to highlight that the sample frame included private sector business types only, who were considered likely to accommodate B-use class floor space based on the Atkins B-use definitions used in this report.

The survey sample frame underestimates the total number of B-use businesses when compared to business unit data provided by the Annual Business Inquiry. The missing business records (the difference between the ABI information and the Experian information) could lead to selection bias in the survey. However, it is not considered that such bias will have any significant effect on the results of the survey and as such is not considered to be relevant.

The survey sample follows a stratified sampling design, whereby the heterogeneous business population is stratified into suitably homogenous groups, based on B-use sector, size of business and location of business. This design type allows for basic statistical analysis and generalisation of the survey results.

B-use Sectors

- B-use manufacturing;
- B-use construction;
- B-use distribution & wholesale;
- B-use transport & communications;
- B-use banking, finance & insurance; and
- B-use other services.

Business Size Bands

- Small (1 -10 employees)
- Medium (11 - 49 employees); and
- Large (50 + employees).

Sub-Regions

- Zone A – Central Leaside; and
- Zone B – Rest of Haringey (to be completed)

B.1.5 Analysis

The remainder of this section details the main findings from the telephone surveys. The results shown here are not weighted.

The findings have been analysed by B-use sector and company size, as defined above, where appropriate. For the Central Leaside survey, some categories are combined due to low responses rates.

Results are only shown where the sample for the question exceeds 2 respondents. Suppressed results are stated as n/a. Even where results are shown it should be noted that, particularly for questions that were not asked to the entire sample population, the number of responses may be small and as such care should therefore be taken when interpreting the results.

Survey Sample

The survey was carried out with 75 businesses in the Haringey part of the Central Leaside and 405 businesses from the rest of Haringey, representing nearly 7% of all B-use class businesses in the Borough. Table B.1 sets out details of the survey sample in relation to the actual structure of B-use businesses (the sample frame).

Table B.1 - Survey Sample Central Leaside Zone: Representativeness

	Total Businesses		Survey Interviews	
	Number ²²	% of total	Number	% of total
By Sector				
Construction	12	7.1	6	8.0
Distribution & wholesale	63	37.5	21	28.0
Finance & business services	42	25	21	28.0
Manufacturing	39	23.2	21	28.0
Other services	4	2.4	2	2.7

²² Figures in red indicate confidential data. Under the 1947 Statistics of Trade Act, these figures should not be passed onto a third party.

	Total Businesses		Survey Interviews	
	Number ²²	% of total	Number	% of total
Transport & communications	8	4.8	4	5.3
TOTAL	168	100	75	100
By Size				
Small (1 - 10 employees)	123	73.2	56	74.7
Medium (11 - 49 employees)	34	20.2	15	20
Large (50 + employees)	11	6.5	4	5.3
TOTAL	168	100	75	100

Table B.2 – Survey Sample Rest of Haringey: Representativeness

	Total Businesses		Survey Interviews	
	Number	% of total	Number	% of total
By Sector				
Construction	404	6.9	41	10.1
Distribution & wholesale	749	12.8	52	12.8
Finance & business services	2,885	49.3	195	48.1
Manufacturing	570	9.7	34	8.4
Other services	1,031	17.6	48	11.9
Transport & communications	216	3.7	35	8.6
TOTAL	5,855	100.0	405	100.0
By Size				
Small (1 - 10 employees)	5,449	93.1	352	86.9
Medium (11 - 49 employees)	321	5.5	44	10.9
Large (50 + employees)	85	1.5	9	2.2
TOTAL	5,855	100.0	405	100.0

Source: ABI, NOMIS and Atkins

B.1.6 Summary of Business Survey Results

Central Leaside Results

The majority of businesses in the survey are in the 'Distribution & Wholesale', 'Finance & business services' and the manufacturing sectors, whilst some 56% of the businesses are of small scale. Most of their employees live within 5 miles and their main customers' base is either in Haringey (26%) or the rest of London (57%). Out of the 75 respondents, 80% have not been affected by skills shortages, whilst the majority of the remaining identified the need for more skilled people.

More than half of the businesses (63%) have been established in Central Leaside for more than 5 years whilst a significant proportion of these (40%) have been in the area for more than 10 years.

Some 35% of the businesses have been operating from their current premises for the last 5 years, while more than half of the respondents have been in the same premises for more than 5 years. More than half of the respondents (54%) occupy their premises on a leasehold basis and 65% have 1-5 years remaining on their existing lease. Some 24% hold the freehold of their premises.

Average size of premises occupied is 2,034 square metres but this varies depending on sectors' specific needs.

More than three quarters of the businesses (79%) responded positively on the suitability of their premises and location. Only 3% found them unsuitable. Main reasons cited were the lack of car parking provision; premises being too old or in poor condition; and poor image of the site/premises.

Some 71% of the respondents are planning to keep their operation at the same scale, whilst 27% are planning to expand their businesses. Out of those 20 businesses who responded positively on expansion plans, some 85% would require an average additional floorspace of 704 square metres. Measures to provide the required additional floorspace include: refurbishment; redevelopment; and more intensive use of existing space.

The majority of the respondents (80%) would do not consider relocation from their premises as an option. Those who do consider relocation, would stay within London and preferably in Haringey (47%). Preferred locations were Tottenham and other parts of North London.

Most of the respondents considered their current location as good and competitive for their business. Main reasons were their proximity to key suppliers and clients, and their access to the road network. On the other hand, factors that made their current location uncompetitive were the lack of suitable sites and premises; poor accessibility; lack of access to key clients/markets and poor environment and quality of life.

Rest of Haringey Results

The majority of employees live within a five mile radius of their job, whilst the proportion varies according to the size of businesses, with employees of smaller companies living closer to their work. More three quarters of customers come from within Haringey (36%) and rest of London (46%).

When asked about any significant skills shortages affecting their business, most responses (88%) were negative. Out of the 12% businesses that gave a positive response, the most affected were those related to skilled (47%); professional (32%); technical (28%); and semi-skilled (28%) occupations.

A third of the businesses have been established in Haringey for less than 5 years whilst some 43% have been operating more than 10 years in the area.

Some 42% of the businesses occupy their premises on a leasehold basis, whilst 36% of the respondents have been in their current premises between 1 and 5 years. Only 25% of the businesses work from freehold spaces.

Although the remaining length of lease varies across the sectors, for example businesses in construction have more time remaining on their leases compared to the 'other services' sector, the majority of businesses (56%) has up to 5 years remaining time till the expiry of their lease.

Overall, the levels of satisfaction with current premises are high, with 80% of surveyed businesses responding positively on the suitability of the occupied premises. Main factor contributing to premises not being entirely suitable for business needs include: site/premises too small (44.3%); the lack of car parking provision (31.3%); and road congestion (18%).

The majority of businesses (68.9%) plan to keep the same scale, and only 25.7% is considering expanding their current premises. Out of those planning to expand, 32.4% and 31.4% come from the manufacturing and transport and communications sector, respectively.

Some 68.3% of the businesses that will expand, will require additional floorspace. Measures to provide additional floorspace include: extension (13.5%); refurbishment (1.4%); redevelopment (8.1%); more intensive use of space (8.1%); and others (68.9%).

Some 5.4% of the total businesses surveyed are considering downsizing their business, with 27.3% of these leading to a need for reduced floorspace. Main reasons for downsizing their business are: efficiency savings (40.9%); reduced market (31.8%); retirement/closing (18.2%).

When asked about relocating their businesses, 77% of the respondents gave a negative response. Out of the remaining 23% that is considering relocation, 43% would consider remaining in the borough and 33% would consider a location within rest of North London.

When asked about their preferences on specific type of location, 41.8% would prefer relocating in a town centre/commercial district and 24.2% in a dedicated industrial area. Preferences vary depending on the sector, thus 55.6% of manufacturing businesses would prefer a dedicated industrial, whilst 48.8% of financial and business services would require premises in a commercial district.

Overall, the majority of surveyed businesses (85.9%) consider their current location to be good and competitive. Reasons include: the proximity to key clients (45.1%); access to road network (28.2%); and being close to home (20.7%).

Total expansion requirements: survey based forecasts

Using data from the Annual Business Inquiry we can provide indicative estimates of the total number of B-use class businesses in Haringey by size. By applying the sample results (Central Leaside and Rest of Haringey combined) to reflect the total number of B-use class businesses, estimates can be provided of the total expansion requirements of indigenous businesses in the Borough .

The method that has been used in order to calculate a forecast of future demand is based on only those respondents who responded that they would definitely be expanding and that they would need additional floorspace. The figures are then further analysed using data from the questions on floor space requirements and relocation.

Table B.3 - Total Expansion Requirements

Size of Business	Small	Medium & Large	Total
Method 1- lower level forecast	213,000 sqm	40,000 sqm	271,000 sqm
Method 2- upper level forecast	265,000 sqm	46,000 sqm	311,000 sqm

Source: Atkins

The survey based estimates of the expansion needs of indigenous business gives an indicative total floor space requirement of approximately 320,000 sqm. However, it is important to highlight that these estimates do not include potential closures and downsizing businesses. In addition, it is necessary to apply a high optimum bias ratio to the findings given the aspirational nature of responses to the expansion question. Applying an optimum bias ratio of 45% would have the effect of reducing expansion demand to a maximum of 135,000 sqm. This accords well with our projections of future employment and floorspace need.

B.1.7 Full Survey Results: Data Tables – Central Leaside

Section A: Business

Question A2: Approximately how many people do you employ?

Table B.4 – Average Number of Employees

	Average number of employees	Standard Deviation	Response rate (%)
By Sector			
Combined sectors	56	148	91.7
Distribution & wholesale	7	6	100.0
Finance & business services	6	4	100.0
Manufacturing	18	24	100.0
TOTAL	17	59	98.7

	Average number of employees	Standard Deviation	Response rate (%)
By Size			
Small	5	3	100.0
Medium & large	53	114	94.7
TOTAL	17	59	98.7

Base: 75 respondents

Question A3: What percentage of your employees live within a five mile radius of this site?

Table B.5 - Proportion of employees living within 5 miles

	Zero	1 to 25	26 to 50	51 to 75	76 to 100	Respondents	Response rate (%)
	% of respondents						
By Sector							
Combined sectors	8	17	33	8	25	11	92
Distribution & wholesale	10	14	29	5	43	21	100
Finance & business services	10	10	33	10	38	21	100
Manufacturing	14	19	19	19	24	20	95
TOTAL	11	15	28	11	33	73	97
By Size							
Small	13	9	25	11	43	56	100
Medium & large	5	32	37	11	5	17	89
TOTAL	11	15	28	11	33	73	97

Base: 75 respondents

Question A4: What proportion of your main customers are based in the following locations?

Table B.6 - Location of main customers

	Haringey	Rest of London	Rest of South East	Rest of UK	International	Respondents	Response rate (%)
	<i>Average proportion of customers (%)</i>						
<i>By Sector</i>							
Combined sectors	23	57	9	6	6	12	100
Distribution & wholesale	34	57	3	0	5	21	100
Finance & business services	31	58	5	5	1	19	90
Manufacturing	12	56	15	15	2	17	81
TOTAL	26	57	8	6	3	69	92
<i>By Size</i>							
Small	26	59	6	6	4	53	95
Medium & large	27	51	14	6	1	16	84
TOTAL	26	57	8	6	3	69	92

Base: 75 respondents

Question A5: How long has your operation been established in Haringey?**Table B.7 - Length of time established in Haringey**

	Less than 1 year	Between 1 and 5 years	Between 5 and 10 years	Between 10 and 25 years	More than 25 years	Respondents	Response rate (%)
	% of respondents						
By Sector							
Combined sectors	8	8	33	25	25	12	100
Distribution & wholesale	14	19	19	33	14	21	100
Finance & business services	10	48	19	14	10	21	100
Manufacturing	10	24	24	33	10	21	100
TOTAL	11	27	23	27	13	75	100
By Size							
Small	14	27	18	27	14	56	100
Medium & large	0	26	37	26	11	19	100
TOTAL	11	27	23	27	13	75	100

Base: 75 respondents

Question A6(i): Do you consider that your business is being affected by significant skills shortages?**Table B.8 – Business affected by Significant Skills Shortages**

	Yes		No	
	Responses	% of total	Responses	% of total
By Sector				
Combined sectors	2	17	10	83
Distribution & wholesale	5	24	16	76
Finance & business services	0	0	21	100
Manufacturing	8	38	13	62
TOTAL	15	20	60	80
By Size				
Small	11	20	45	80
Medium & large	4	21	15	79
TOTAL	15	20	60	80

Base: 75 respondents; Response rate: 100%

Question A6(ii): What type or types of significant skills shortages is your company experiencing?

Asked only to those responding 'yes' to Question A6(i)

Table B.9– Type of Skills Shortages

	Respondents	% of total
Skilled	9	60
Semi-skilled	4	27
Managerial	3	20
Professional	3	20
Technical	1	7
Good with their hands	1	7

Base: 15 respondents; Response rate 100%

8.7.1 Section B: Premises

Question B1: How long has your business operated out of the premises which you currently occupy?

Table B.10 – Length of Time in Current Premises

	Less than 1 year	Between 1 and 5 years	Between 5 and 10 years	Between 10 and 25 years	More than 25 years	Respondents	Response rate (%)
	% of respondents						
By Sector							
Combined sectors	8	17	25	33	17	12	100
Distribution & wholesale	19	24	24	19	14	21	100
Finance & business services	14	48	19	14	5	21	100
Manufacturing	14	43	24	19	0	21	100
TOTAL	15	35	23	20	8	75	100
By Size							
Small	16	34	23	18	9	56	100
Medium & large	11	37	21	26	5	19	100
TOTAL	15	35	23	20	8	75	100

Base: 75 respondents

Question B2(i): By what tenure do you occupy your premises?

Table B.11 – Tenure Type

	Freehold	Leasehold	License	Rented	Respondents	Response rate (%)
	% of respondents					
By Sector						
Combined sectors	33	56	11	0	9	75
Distribution & wholesale	26	63	0	11	19	90
Finance & business services	11	58	11	21	19	90
Manufacturing	29	43	5	24	21	100
TOTAL	24	54	6	16	68	91
By Size						
Small	22	52	4	22	50	89
Medium & large	28	61	11	0	18	95
TOTAL	24	54	6	16	68	91

Base: 75 respondents

Question B2(ii): What is the remaining length of your lease?

Asked only to those responding tenure type as 'leasehold' in Question B2(i)

Table B.12 – Time Remaining on Existing Lease

	Respondents	% of total
Less than 1 year	4	15
1 to 5 years	17	65
6 to 10 years	2	8
11 to 25 years	3	12

Base: 37 respondents; Response rate 70%

Question B3: Roughly how much floor space do your premises occupy?

Table B.13 – Average Size of Premises

	Average size (square metres)	Respondents	Response rate (%)
By Sector			
Combined sectors	1973	8	67
Distribution & wholesale	807	13	62
Finance & business services	175	10	48
Manufacturing	4094	17	81
TOTAL	2034	48	64
By Size			
Small	309	33	59
Medium & large	5828	15	79
TOTAL	2034	48	64

Base: 48 respondents

Question B4: How suitable is your current premises / location for your business?

Table B.14 – Suitability of Current Premises/Location

	Very suitable	Reasonably suitable	Unsuitable	Respondents	Response rate (%)
	% of respondents				
By Sector					
Combined sectors	58	33	8	12	100
Distribution & wholesale	86	14	0	21	100
Finance & business services	95	5	0	21	100
Manufacturing	67	29	5	21	100
TOTAL	79	19	3	75	100
By Size					
Small	79	21	0	56	100
Medium & large	79	11	11	19	100
TOTAL	79	19	3	75	100

Base: 75 respondents

Question B5: What are the main factors that contribute to your premises not being entirely suitable for your business needs?

Asked only to those responding current premises/location as 'reasonably suitable' or 'unsuitable' in Question B4

Table B.15– Main Factors Contributing to Unsuitability of Premises

	Respondents	% of total
Premises too old / in poor condition	4	25
Site / premises too small	3	19
High security costs	1	6
Poor site access	2	13
Road congestion	3	19
Lack of car parking provision	5	31
Poor image of site / premises	4	25
Poor local facilities/amenities	1	6
No rubbish collection or recycling	1	6

Base: 16 respondents

Question B6: Are you planning to expand, keep the same scale or downsize your business in the next 5 years?

Table B.16 – 5-Year Business Plans

	Expand	Keep same scale	Downsize	Respondents	Response rate (%)
	% of respondents				
By Sector					
Combined sectors	33	67	0	12	100
Distribution & wholesale	24	76	0	21	100
Finance & business services	24	71	5	21	100
Manufacturing	29	67	5	21	100
TOTAL	27	71	3	75	100
By Size					
Small	29	70	2	56	100
Medium & large	21	74	5	19	100
TOTAL	27	71	3	75	100

Base: 75 respondents

Question B7: Will this expansion lead to a need for additional floorspace?*Asked only to those responding 5-year business plans as 'expansion' in Question B6***Table B.17 – Additional Floorspace Required for Expansion**

	Respondents			% of respondents		
	Yes	No	Don't know	Yes	No	Don't know
By Sector						
Combined sectors	4	0	0	100	0	0
Distribution & wholesale	4	1	0	80	20	0
Finance & business services	4	0	1	80	0	20
Manufacturing	5	0	1	83	0	17
TOTAL	17	1	2	85	5	10
By Size						
Small	13	1	2	81	6	13
Medium & large	4	0	0	100	0	0
TOTAL	17	1	2	85	5	10

*Base: 20 respondents***Question B8: Roughly how much additional floor space do you think you will need? (gross square metres or gross square feet)?***Asked only to those responding a need for additional floorspace in Question B7***Table B.18 – Additional Floorspace Required for Expansion**

	Average floorspace (square metres)	Respondents	Response rate (%)
By Sector			
Combined sectors	n/a	1	25
Distribution & wholesale	n/a	2	50
Finance & business services	n/a	2	50
Manufacturing	1301	4	80
TOTAL	704	9	53
By Size			
Small	321	7	54
Medium & large	n/a	2	50
TOTAL	704	9	53

Base: 9 respondents

Question B9: Could this additional floor space be provided on your current site through the following measures?

Asked only to those responding a need for additional floorspace in Question B7

NOTE 1: Due to the low base level of respondents and the high proportion of non-responses, data by sector has been suppressed

NOTE 2: Percentages do not sum to 100% as more than one measured may be identified by respondents

Table B.19 – Measures to Provide Required Additional Floorspace

	Respondents	% of total
Extension	4	24
Refurbishment	6	35
Redevelopment	5	29
More intensive use of existing space	5	29
None of the above	10	59

Base: 17 respondents

Question B10: Will this downsizing lead to a need for a reduction in floor space?

NOTE 1: Due to the low base level of respondents for this question (2 respondents), responses have not been analysed

Question B11: Roughly how much less floor space do you think you will need? (gross square metres or gross square feet)?

NOTE 1: Due to the low base level of respondents for this question (2 respondents), responses have not been analysed

Question B12: What are the main reasons for downsizing your business?

NOTE 1: Due to the low base level of respondents for this question (2 respondents), responses have not been analysed

Question B13: Are you considering relocating from your current premises?

Table B.20– Relocation Considerations

	Respondents		% of respondents	
	Yes	No	Yes	No
By Sector				
Combined sectors	2	10	17	83
Distribution & wholesale	2	19	10	90
Finance & business services	5	16	24	76
Manufacturing	6	15	29	71
TOTAL	15	60	20	80
By Size				
Small	10	46	18	82
Medium & large	5	14	26	74
TOTAL	15	60	20	80

Base: 75 respondents; Response rate: 100%

Question B14: To which of the following locations have you considered relocating?

Asked only to those responding as considering relocation in Question B13

Table B.21 – Locations Considered for Relocation

	Haringey	Rest of North London	Rest of London	Outside London	Elsewhere	Respondents	Response rate (%)
	% of respondents						
By Sector							
Combined sectors	n/a	n/a	n/a	n/a	n/a	2	100
Distribution & wholesale	n/a	n/a	n/a	n/a	n/a	2	100
Finance & business services	60	20	20	0	0	5	100
Manufacturing	50	50	17	0	17	6	100
TOTAL	47	40	33	7	7	15	100
By Size							
Small	50	20	30	0	10	10	100
Medium & large	40	80	40	20	0	5	100
TOTAL	47	40	33	7	7	15	100

Base: 15 respondents

Question B15: To which area would you prefer to relocate?

Asked only to those responding 'Haringey' as their preferred location in Question B14

Table B.22 – Preferred Haringey Relocation Area

	Respondents	% of total
Tottenham	2	33
High Road	1	17
North London	2	33
Anywhere with better parking	1	17

Base: 7 respondents; Response rate: 86%

Question B16: To what type of location would you prefer to relocate?

Asked only to those responding as considering relocation in Question B13

Table B.23 – Preferred Type of Location for Relocation

	Dedicated industrial area	Residential area	Town centre / commercial district	Mixed-use area	Out of this country	Rural area	Respondents	Response rate (%)
	% of respondents							
By Sector								
Combined sectors	n/a	n/a	n/a	n/a	n/a	n/a	1	50
Distribution & wholesale	n/a	n/a	n/a	n/a	n/a	n/a	2	100
Finance & business services	0	0	60	20	0	20	5	100
Manufacturing	67	0	17	0	17	0	6	100
TOTAL	50	0	29	7	7	7	14	93
By Size								
Small	30	0	40	10	10	10	10	100
Medium & large	100	0	0	0	0	0	4	80
TOTAL	50	0	29	7	7	7	14	93

Base: 14 respondents

Question B17: Do you think that you would be able to find appropriate premises within Haringey?

Asked only to those responding as considering relocation in Question B13

Table B.24 – Appropriate Premises available within Haringey

	Respondents			% of respondents		
	Yes	No	Don't know	Yes	No	Don't know
<i>By Sector</i>						
Combined sectors	n/a	n/a	n/a	n/a	n/a	n/a
Distribution & wholesale	n/a	n/a	n/a	n/a	n/a	n/a
Finance & business services	3	1	1	60	20	20
Manufacturing	2	3	1	33	50	17
TOTAL	6	7	2	40	47	13
<i>By Size</i>						
Small	4	4	2	40	40	20
Medium & large	2	3	0	40	60	0
TOTAL	6	7	2	40	47	13

Base: 15 respondents

Question B18: Do you consider the current location of your business to be a good and competitive location? And why?

Table B.25 – Consideration of Current Location as a Good and Competitive Location

	Respondents		% of respondents	
	Yes	No	Yes	No
<i>By Sector</i>				
Combined sectors	8	4	67	33
Distribution & wholesale	20	1	95	5
Finance & business services	17	4	81	19
Manufacturing	17	4	81	19
TOTAL	62	13	83	17
<i>By Size</i>				
Small	46	10	82	18
Medium & large	16	3	84	16
TOTAL	62	13	83	17

Base: 75 respondents; Response rate: 100%

Table B.26 – Reasons for Considering Haringey as a Good and Competitive Location

	Proximity to key suppliers	Access to road network	Proximity to key clients	Good environment / quality of life	Access to rail network	Appropriate type of premises	Affordable premises	Proximity to skilled workforce	Don't know	Close to home	Proximity to key suppliers	Access to road network	Proximity to key clients	Good environment / quality of life	Access to rail network	Appropriate type of premises	Affordable premises	Proximity to skilled workforce	Don't know	Close to home	
	Respondents										% of total										
By Sector																					
Combined sectors	6	3	5	1	1	1	1	1	0	0	75	38	63	13	13	13	13	13	13	0	0
Distribution & wholesale	15	8	8	4	1	1	1	0	0	0	75	40	40	20	5	5	5	0	0	0	0
Finance & business services	8	10	5	4	6	2	1	4	1	0	47	59	29	24	35	12	6	24	6	0	0
Manufacturing	8	4	7	2	0	3	3	1	2	1	47	24	41	12	0	18	18	6	12	6	6
TOTAL	37	25	25	11	8	7	6	6	3	1	60	40	40	18	13	11	10	10	5	2	2
By Size																					
Small	25	18	15	7	5	5	5	4	3	1	54	39	33	15	11	11	11	9	7	2	2
Medium & large	12	7	10	4	3	2	1	2	0	0	75	44	63	25	19	13	6	13	0	0	0
TOTAL	37	25	25	11	8	7	6	6	3	1	60	40	40	18	13	11	10	10	5	2	2

Base: 62 respondents

Table B.27 – Reasons for Not Considering Haringey as a Good and Competitive Location

	Lack of suitable sites and premises	Poor accessibility	Lack of access to key clients / markets	Poor environment / quality of life	Congestion	Expensive premises	Lack of access to key suppliers	Lack of skilled labour / labour shortages	Poor maintenance of the area	Lack of suitable sites and premises	Poor accessibility	Lack of access to key clients / markets	Poor environment / quality of life	Congestion	Expensive premises	Lack of access to key suppliers	Lack of skilled labour / labour shortages	Poor maintenance of the area	
	Respondents									% of total									
By Sector																			
Combined sectors	1	1	0	1	2	1	1	2	1	25	25	0	25	50	25	25	50	25	
Distribution & wholesale	0	1	0	0	0	0	0	0	0	0	100	0	0	0	0	0	0	0	
Finance & business services	2	0	3	0	0	0	1	0	0	50	0	75	0	0	0	25	0	0	
Manufacturing	1	2	0	2	0	1	0	0	0	25	50	0	50	0	25	0	0	0	
TOTAL	4	4	3	3	2	2	2	2	1	31	31	23	23	15	15	15	15	8	
By Size																			
Small	3	2	3	2	2	1	2	2	0	30	20	30	20	20	10	20	20	0	
Medium & large	1	2	0	1	0	1	0	0	1	33	67	0	33	0	33	0	0	33	
TOTAL	4	4	3	3	2	2	2	2	1	31	31	23	23	15	15	15	15	8	

Base: 23 respondents

B.1.8 Full Survey Results: Data Tables – Rest of Haringey**Section A: Business****Question A2: Approximately how many people do you employ?****Table B.28 – Average Number of Employees**

	Average number of employees	Standard Deviation	Respondents	Response rate (%)
<i>By Sector</i>				
Construction	12	39	41	100
Distribution & wholesale	27	138	52	100
Finance & business services	5	9	195	100
Manufacturing	10	14	34	100
Other services	6	10	48	100
Transport & communications	22	72	35	100
TOTAL	11	56	405	100
<i>By Size</i>				
Small	3	2	352	100
Medium	22	11	44	100
Large	240	308	9	100
TOTAL	11	56	405	100

Base: 405 respondents

Question A3: Approximately what percentage of your employees live within a five mile radius of this site?

Table B.29- Proportion of employees living within 5 miles

	Zero	1 to 25	26 to 50	51 to 75	76 to 100	Respondents	Response rate (%)
	% of respondents						
By Sector							
Construction	12	5	15	5	63	41	100
Distribution & wholesale	22	20	16	10	32	50	96
Finance & business services	9	19	9	7	55	193	99
Manufacturing	6	26	12	6	50	34	100
Other services	13	15	15	4	54	48	100
Transport & communications	14	29	20	0	37	35	100
TOTAL	12	19	12	6	51	401	99
By Size							
Small	13	18	10	5	54	351	100
Medium	2	21	33	12	31	42	95
Large	0	38	25	25	13	8	89
TOTAL	12	19	12	6	51	401	99

Base: 405 respondents

Question A4: What proportion of your main customers are based in the following locations?

Table B.30 - Location of main customers

	Haringey	Rest of London	Rest of South East	Rest of UK	International	Respondents	Response rate (%)
	<i>Average proportion of customers (%)</i>						
<i>By Sector</i>							
Construction	37	54	5	3	0	39	95
Distribution & wholesale	36	43	7	12	2	40	77
Finance & business services	34	49	7	6	3	170	87
Manufacturing	33	42	4	12	9	31	91
Other services	42	42	3	6	7	46	96
Transport & communications	39	38	5	8	10	33	94
TOTAL	36	46	6	7	4	359	89
<i>By Size</i>							
Small	37	46	6	7	4	313	89
Medium	33	42	8	10	6	40	91
Large	12	78	7	2	1	6	67
TOTAL	36	46	6	7	4	359	89

Base: 405 respondents

Question A5: How long has your operation been established in Haringey?

Table B.31- Length of time established in Haringey

	Less than 1 year	Between 1 and 5 years	Between 5 and 10 years	Between 10 and 25 years	More than 25 years	Respondents	Response rate (%)
	% of respondents						
By Sector							
Construction	10	29	20	22	20	41	100
Distribution & wholesale	6	24	12	40	18	50	96
Finance & business services	5	33	22	26	14	190	97
Manufacturing	9	18	21	36	15	33	97
Other services	6	46	6	29	13	48	100
Transport & communications	6	29	32	24	9	34	97
TOTAL	6	31	19	28	15	396	98
By Size							
Small	6	34	19	26	15	345	98
Medium	10	12	26	38	14	42	95
Large	0	0	11	78	11	9	100
TOTAL	6	31	19	28	15	396	98

Base: 405 respondents

Question A6(i): Do you consider that your business is being affected by significant skills shortages?

Table B.32 – Business affected by Significant Skills Shortages

	Respondents		% of respondents	
	Yes	No	Yes	No
By Sector				
Construction	7	34	17	83
Distribution & wholesale	10	42	19	81
Finance & business services	21	174	11	89
Manufacturing	2	32	6	94
Other services	3	45	6	94
Transport & communications	4	31	11	89
TOTAL	47	358	12	88
By Size				
Small	38	314	11	89
Medium	8	36	18	82
Large	1	8	11	89
TOTAL	47	358	12	88

Base: 405 respondents

Question A6(ii): What type or types of significant skills shortages is your company experiencing?

Asked only to those responding 'yes' to Question A6(i)

Table B.33 – Type of Skills Shortages

	Respondents	% of total
Skilled	22	47
Professional	15	32
Technical	13	28
Semi-skilled	13	28
Administrative	5	11
Managerial	4	9
Unskilled	3	6
Language problems	1	2
IT	1	2
Not sure	1	2

Base: 47 respondents; Response rate 100%

8.7.2 Section B: Premises

Question B1: How long has your business operated out of the premises which you currently occupy?

Table B.34 – Length of Time in Current Premises

	Less than 1 year	Between 1 and 5 years	Between 5 and 10 years	Between 10 and 25 years	More than 25 years	Respondents	Response rate (%)
	% of respondents						
By Sector							
Construction	17	37	15	15	17	41	100
Distribution & wholesale	9	28	13	34	17	47	90
Finance & business services	7	37	22	22	12	187	96
Manufacturing	9	31	19	28	13	32	94
Other services	10	46	10	27	6	48	100
Transport & communications	6	35	29	19	10	31	89
TOTAL	9	36	19	24	12	386	95
By Size							
Small	9	40	18	21	12	336	95
Medium	12	14	28	33	14	43	98
Large	0	0	14	71	14	7	78
TOTAL	9	36	19	24	12	386	95

Base: 405 respondents

Question B2(i): By what tenure do you occupy your premises?

Table B.35 – Tenure Type

	Freehold	Leasehold	License	Work from home	Mobile	Rented	Respondents	Response rate (%)
	<i>% of respondents</i>							
By Sector								
Construction	27	38	0	16	11	8	37	90
Distribution & wholesale	23	67	4	0	0	6	48	92
Finance & business services	31	37	8	14	3	8	182	93
Manufacturing	14	69	3	10	0	3	29	85
Other services	13	24	20	30	4	9	46	96
Transport & communications	25	44	9	6	6	9	32	91
TOTAL	25	42	8	13	4	7	374	92
By Size								
Small	25	41	8	15	4	8	325	92
Medium	34	49	7	2	5	2	41	93
Large	13	75	0	0	0	13	8	89
TOTAL	25	42	8	13	4	7	374	92

Base: 405 respondents

Question B2(ii): What is the remaining length of your lease?*Asked only to those responding tenure type as 'leasehold' in Question B2(i)***Table B.36 – Time Remaining on Existing Lease**

	Less than 1 year	Between 1 and 5 years	Between 6 and 10 years	Between 11 and 25 years	More than 25 years	Respondents	Response rate (%)
	% of respondents						
By Sector							
Construction	0	0	60	40	0	5	36
Distribution & wholesale	17	52	9	22	0	23	72
Finance & business services	8	46	21	23	3	39	58
Manufacturing	28	33	28	11	0	18	90
Other services	11	56	33	0	0	9	82
Transport & communications	36	9	9	36	9	11	79
TOTAL	16	40	21	21	2	105	66
By Size							
Small	17	38	21	22	2	90	68
Medium	17	50	25	8	0	12	60
Large	0	67	0	33	0	3	50
TOTAL	16	40	21	21	2	105	66

Base: 157 respondents

Question B3: Roughly how much floor space do your premises occupy?

Table B.37 – Average Size of Premises

	Average size (square metres)	Respondents	Response rate (%)
<i>By Sector</i>			
Construction	1,123	6	15
Distribution & wholesale	638	4	8
Finance & business services	111	78	40
Manufacturing	322	18	53
Other services	197	16	33
Transport & communications	576	20	57
TOTAL	271	142	35
<i>By Size</i>			
Small	173	125	36
Medium	442	12	27
Large	2,303	5	56
TOTAL	271	142	35

Base: 405 respondents

Question B4: How suitable is your current premises / location for your business?

Table B.38 – Suitability of Current Premises/Location

	Very suitable	Reasonably suitable	Unsuitable	Respondents	Response rate (%)
	% of respondents				
By Sector					
Construction	78.0	14.6	7.3	41	10.1
Distribution & wholesale	63.5	25.0	11.5	52	12.8
Finance & business services	65.6	10.9	2.4	247	61.0
Manufacturing	85.3	11.8	2.9	34	8.4
Other services	89.6	10.4	0	48	11.9
Transport & communications	74.3	17.1	8.6	35	8.6
TOTAL	80.2	15.1	4.7	405	100.0
By Size					
Small	81.0	14.7	4.3	368	91
Medium & large	73.0	18.9	8.1	37	9
TOTAL	80.2	15.1	4.7	405	100

Base: 405 respondents

Question B5: What are the main factors that contribute to your premises not being entirely suitable for your business needs?

Asked only to those responding current premises/location as 'reasonably suitable' or 'unsuitable' in Question B4

Note that the total sum of respondents is greater than 61 and that the sum of percentages is greater than 100, as some respondents stated more than one factor.

Table B.39 – Main Factors Contributing to Suitability of Premises

	Respondents	% of total
Site/Premises too small	27	44.3
Lack of car parking provision	19	31.1
Road congestion	11	18.0
Poor image of site/premises	10	16.4
High rents	9	14.8
Poor site access	9	14.8
Poor access to markets/lack of customers	7	11.5
High business rates	6	9.8
Premises too old/in poor conditions	5	8.2
Poor local facilities/amenities	5	8.2
Poor public transport	4	6.6
High security costs	3	4.9
Unfavourable lease conditions	2	3.3
The Red Route	2	3.3
Poor public realm	1	1.6

Base: 61 respondents

Question B6: Are you planning to expand, keep the same scale or downsize your business in the next 5 years?

Table B.40 – 5-Year Business Plans

	Expand	Keep same scale	Downsize	Respondents	Response rate (%)
	% of respondents				
By Sector					
Construction	34.1	53.7	12.2	41	100
Distribution & wholesale	17.3	75.0	7.7	52	100
Finance & business services	25.1	69.7	5.1	195	100
Manufacturing	32.4	64.7	2.9	34	100
Other services	20.8	75.0	4.2	48	100
Transport & communications	31.4	68.6	0.0	35	100
TOTAL	25.7	68.9	5.4	405	100
By Size					
Small	25.3	69.0	5.7	368	100
Medium & large	29.7	67.6	2.7	37	100
TOTAL	25.7	68.9	5.4	405	100

Base: 405 respondents

Question B7: Will this expansion lead to a need for additional floorspace?*Asked only to those responding 5-year business plans as 'expansion' in Question B6***Table B.41 – Additional Floorspace Required for Expansion**

	Respondents			% of respondents		
	Yes	No	Don't know	Yes	No	Don't know
By Sector						
Construction	6	5	3	42.9	35.7	21.4
Distribution & wholesale	8	0	1	88.9	0.0	11.1
Finance & business services	32	13	4	65.3	26.5	8.2
Manufacturing	8	1	2	72.7	9.1	18.2
Other services	8	2	0	80.0	20.0	0.0
Transport & communications	9	1	1	81.8	9.1	9.1
TOTAL	71	22	11	68.3	21.2	10.6
By Size						
Small	64	20	9	68.8	21.5	9.7
Medium & large	7	2	2	63.6	18.2	18.2
TOTAL	71	22	11	68.3	21.2	10.6

Base: 104 respondents; Response rate: 100%

Question B8: Roughly how much additional floor space do you think you will need?*Asked only to those responding a need for additional floorspace in Question B7***Table B.42 – Additional Floorspace Required for Expansion**

	Average floorspace (square metres)	Respondents	Response rate (%)
<i>By Sector</i>			
Construction	635	4	5.6
Distribution & wholesale	390	5	7.0
Finance & business services	81	13	18.3
Manufacturing	301	6	8.5
Other services	99	3	4.2
Transport & communications	488	7	9.9
TOTAL	291	38	53.5
<i>By Size</i>			
Small	305	34	47.9
Medium & large	175	4	5.6
TOTAL	291	38	53.5

Base: 71 respondents

Question B9: Could this additional floor space be provided on your current site through the following measures?

Asked only to those responding a need for additional floorspace in Question B7

Table B.43 – Measures to Provide Required Additional Floorspace

	Extension	Refurbishment	Redevelopment	More intensive use of space	None of the above	Respondents	Response rate (%)
	% of respondents						
By Sector							
Construction	0	0	0	16.7	83.3	6	100
Distribution & wholesale	12.5	0	12.5	12.5	62.3	8	100
Finance & business services	12.5	0	9.4	6.2	71.9	32	100
Manufacturing	9.1	9.1	9.1	18.2	54.5	8	100
Other services	12.5	0	0	0	87.5	8	100
Transport & communications	33.3	0	11.1	0	55.6	9	100
TOTAL	13.5	1.4	8.1	8.1	68.9	71	100
By Size							
Small	14.1	0	7.8	6.2	71.9	64	100
Medium & large	14.3	14.3	14.3	28.6	71.4	7	100
TOTAL	13.5	1.4	8.1	8.1	68.9	71	100

Base: 71 respondents

Question B10: Will this downsizing lead to a need for a reduction in floor space?*Asked only to those responding 5-year business plans as 'downsizing' in Question B6***Table B.44– Reduction in Floorspace due to Downsizing**

	Respondents			% of respondents		
	Yes	No	Don't know	Yes	No	Don't know
By Sector						
Construction	2	2	1	40	40	20
Distribution & wholesale	0	2	2	0	50	50
Finance & business services	3	7	0	30	70	0
Manufacturing	n/a	n/a	n/a	n/a	n/a	n/a
Other services	n/a	n/a	n/a	n/a	n/a	n/a
Transport & communications	0	0	0	0	0	0
TOTAL	6	12	4	27.3	54.5	18.2
By Size						
Small	5	12	4	23.8	57.1	1.9
Medium & large	n/a	n/a	n/a	n/a	n/a	n/a
TOTAL	6	12	4	27.3	54.5	18.2

*Base: 22 respondents; Response rate: 100%***Question B11: Roughly how much less floor space do you think you will need? (gross square metres or gross square feet)?**

NOTE 1: Due to the low base level of respondents for this question (2 respondents), responses have not been analysed

Question B12: What are the main reasons for downsizing your business?**Asked only to those responding 5-year business plans as 'downsizing' in Question B6**

Table B.45 Reasons for Downsizing

	Change of business	Reduced market	Efficiency savings	Retiring/ Closing	Moving abroad	Respondents	Response rate (%)
	% of respondents						
By Sector							
Construction	0	60	20	20	0	5	100
Distribution & wholesale	0	50	50	0	0	4	100
Finance & business services	9.1	18.2	45.5	27.3	0	11	100
Manufacturing	n/a	n/a	n/a	n/a	n/a	1	100
Other services	n/a	n/a	n/a	n/a	n/a	2	100
Transport & communications	0	0	0	0	0	0	100
TOTAL	9.1	31.8	40.9	18.2	4.5	22	100
By Size							
Small	9.1	27.3	40.9	18.2	4.5	21	100
Medium & large	n/a	n/a	n/a	n/a	n/a	1	100
TOTAL	9.1	31.8	40.9	18.2	4.5	22	100

Base: 22 respondents

Question B13: Are you considering relocating from your current premises?

Table B.46– Relocation Considerations

	Respondents		% of respondents	
	Yes	No	Yes	No
By Sector				
Construction	14	27	34	66
Distribution & wholesale	6	46	12	88
Finance & business services	41	154	21	79
Manufacturing	11	23	32	68
Other services	12	36	25	75
Transport & communications	9	26	26	74
TOTAL	93	312	23	77
By Size				
Small	85	283	23	77
Medium & large	8	29	22	78
TOTAL	93	312	23	77

Base: 405 respondents; Response rate: 100%

Question B14: To which of the following locations have you considered relocating?

Asked only to those responding as considering relocation in Question B13

Note that businesses might have given one or more responses to the question and therefore percentages may sum to greater than 100%.

Table B.47 – Locations Considered for Relocation

	Haringey	Rest of North London	Rest of London	Outside London	Elsewhere	Respondents	Response rate (%)
	% of respondents						
By Sector							
Construction	57.1	28.6	28.6	7.1	0.0	14	100
Distribution & wholesale	16.7	33.3	33.3	0.0	16.7	6	100
Finance & business services	43.9	34.1	17.1	4.9	9.8	41	100
Manufacturing	36.4	45.5	36.4	9.1	18.2	11	100
Other services	41.7	25.0	16.7	0.0	16.7	12	100
Transport & communications	44.4	33.3	22.2	0.0	0.0	9	100
TOTAL	43.0	33.3	22.6	4.3	9.7	93	100
By Size							
Small	42.4	32.9	22.4	3.5	10.6	85	100
Medium & large	50.0	37.5	25.0	12.5	0.0	7	100
TOTAL	43.0	33.3	22.6	4.3	9.7	93	100

Base: 93 respondents

Question B15: To which area would you prefer to relocate?*Asked only to those responding 'Haringey' as their preferred location in Question B14***Table B.48 – Preferred Haringey Relocation Area**

	Respondents	% of total
Tottenham	3	7.3
Nearer to tube or train	3	7.3
Neighbouring premises in this immediate area	5	12.2
Anywhere with storage space	2	4.9
Wood Green	2	4.9
Crouch End	2	4.9
Nowhere particular	17	41.5
Muswell Hill	1	2.4
High Street	1	2.4
Green Lane	1	2.4
Barnet	1	2.4
Depends on council's incentives	1	2.4
Near M22	1	2.4
N10 postal area	1	2.4

Base: 40 respondents; Response rate: 100%

Question B16: To what type of location would you prefer to relocate?*Asked only to those responding as considering relocation in Question B13***Table B.49– Preferred Type of Location for Relocation**

	Dedicated industrial area	Residential area	Town centre / commercial district	Mixed-use area	Out of this country	Rural area	Respondents	Response rate (%)
	% of respondents							
By Sector								
Construction	28.6	21.4	50	0	0	0	14	100
Distribution & wholesale	33.3	16.7	16.7	33.3	0	0	6	100
Finance & business services	14	20.9	48.8	16.3	0	0	41	100
Manufacturing	55.6	11.1	33.3	0	0	0	11	81.8
Other services	18.2	27.3	9.1	27.3	9.1	9.1	12	91.7
Transport & communications	37.5	0	62.5	0	0	0	9	88.9
TOTAL	24.2	18.7	41.8	13.2	1.1	1.1	93	97.8
By Size								
Small	21.7	20.5	43.4	12	1.2	1.2	83	97.6
Medium & large	50	0	25	25	0	0	8	100.0
TOTAL	24.2	18.7	41.8	13.2	1.1	1.1	91	97.8

Base: 93 respondents

Question B17: Do you think that you would be able to find appropriate premises within Haringey?

Asked only to those responding as considering relocation in Question B13

Table B.50– Appropriate Premises available within Haringey

	Respondents			% of respondents		
	Yes	No	Don't know	Yes	No	Don't know
By Sector						
Construction	9	1	4	64.3	7.1	28.6
Distribution & wholesale	4	2	0	66.7	33.3	0
Finance & business services	21	9	11	51.2	22.0	26.8
Manufacturing	3	2	6	27.3	18.2	54.5
Other services	6	5	1	50.0	41.7	8.3
Transport & communications	4	3	2	44.4	33.3	22.2
TOTAL	47	22	24	50.5	23.7	25.8
By Size						
Small	43	20	22	50.6	23.5	25.9
Medium & large	4	2	2	50.0	25.0	25.0
TOTAL	47	22	24	50.5	23.7	25.8

Base: 93 respondents; Response rate 100%

Question B18: Do you consider the current location of your business to be a good and competitive location? And why?

Table B.51 – Consideration of Current Location as a Good and Competitive Location

	Respondents		% of respondents	
	Yes	No	Yes	No
By Sector				
Construction	36	5	87.8	12.2
Distribution & wholesale	43	9	82.7	17.3
Finance & business services	173	22	88.7	11.3
Manufacturing	28	6	82.4	17.6
Other services	40	8	83.3	16.7
Transport & communications	28	7	80	20
TOTAL	348	57	85.9	14.1
By Size				
Small	316	52	85.9	14.1
Medium & large	32	5	86.5	13.5
TOTAL	348	57	85.9	14.1

Base: 405 respondents; Response rate: 100%

Table B.52– Reasons for Considering Haringey as a Good and Competitive Location

	Respondents	% of total
Proximity to key suppliers	37	10.6
Proximity to key clients / markets	157	45.1
Affordable premises	64	18.4
Appropriate type of premises	33	9.5
Proximity to skilled workforce	13	3.7
Access to road network	98	28.2
Access to rail network	42	12.1
Good environment / quality of life	73	21
Close to home	72	20.7
Good parking	7	2

Base: 348 respondents

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