LB Haringey

Evidence-Vision-Action

A Study into Tottenham's Creative Industries

September 2017

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Summary

Regeneris Consulting and We Made That were commissioned by LB Haringey to produce a report which identifies, maps and analyses the creative industries within Tottenham. This report forms the initial evidence base to support the development of LB Haringey's CEZ action plan.

Tottenham is home to an exciting and rapidly developing creative sector which is helping to establish new opportunities for residents and businesses. This development is helping to create a new identity within Tottenham and rejuvenate existing well-established industries, such as fashion and furniture manufacturing.

Tottenham's creative sector (encompassing core activities and sectors which support creativity) employs around 4,400 people within 660 businesses. Nearly a fifth of employment in Tottenham (17%) is in sectors which relate to creative activity.

Creative employment occurs across Tottenham, although there are specific concentrations of creative businesses in South Tottenham. Four clusters of notable creative activity have been identified in Tottenham and are further expanded on within this document.

Tottenham has a number of strong and rapidly growing creative sub-sectors, which help create a unique ecosystem locally. Emerging creative sub-sectors within Tottenham's economy includes fashion manufacturing; IT, software and computer services; design; film, TV, video, radio & photography and small-scale manufacturing. Tottenham's recent growth has typically been in higher value creative sub-sectors[1] including film, TV, video, radio & photography; IT, software and computer services.

Over the last five years, Tottenham's creative economy has grown by an average of 17% per annum. If these growth rates continue, it is estimated that 300 new creative jobs could be created each year, generating additional GVA of £26m p.a. (based on London's average productivity in the creative sector).

Tottenham has many selling points and opportunities, which provide opportunities to further establish the creative sector's presence in the area. There are also several gaps and barriers which are currently limiting the development which, if addressed, could lead to further expansion and diversification. These are outlined below, and further expanded on page 37.

Figure 1: Foundations of the Tottenham Creative Enterprise Zone

Opportunities

- Established 'making and creating' **heritage**
- Authentic and **organic** creative **clusters**
- Major private and public **investment**
- **Transport** infrastructure
- Large **industrial** stock
- Connectivity to **markets** and creative areas
- **Education** eg. National College of Digital Skills

Gaps and Barriers

- **Statistics** not reflecting the current scale of Tottenham's creative industries
- Skills and ability for existing **residents** to **participate** within the creative sector
- **Reputational** issues
- Pace of **change** within area
- Reliance upon **informal networks**
- Rising **cost** of **workspace** and **residential**

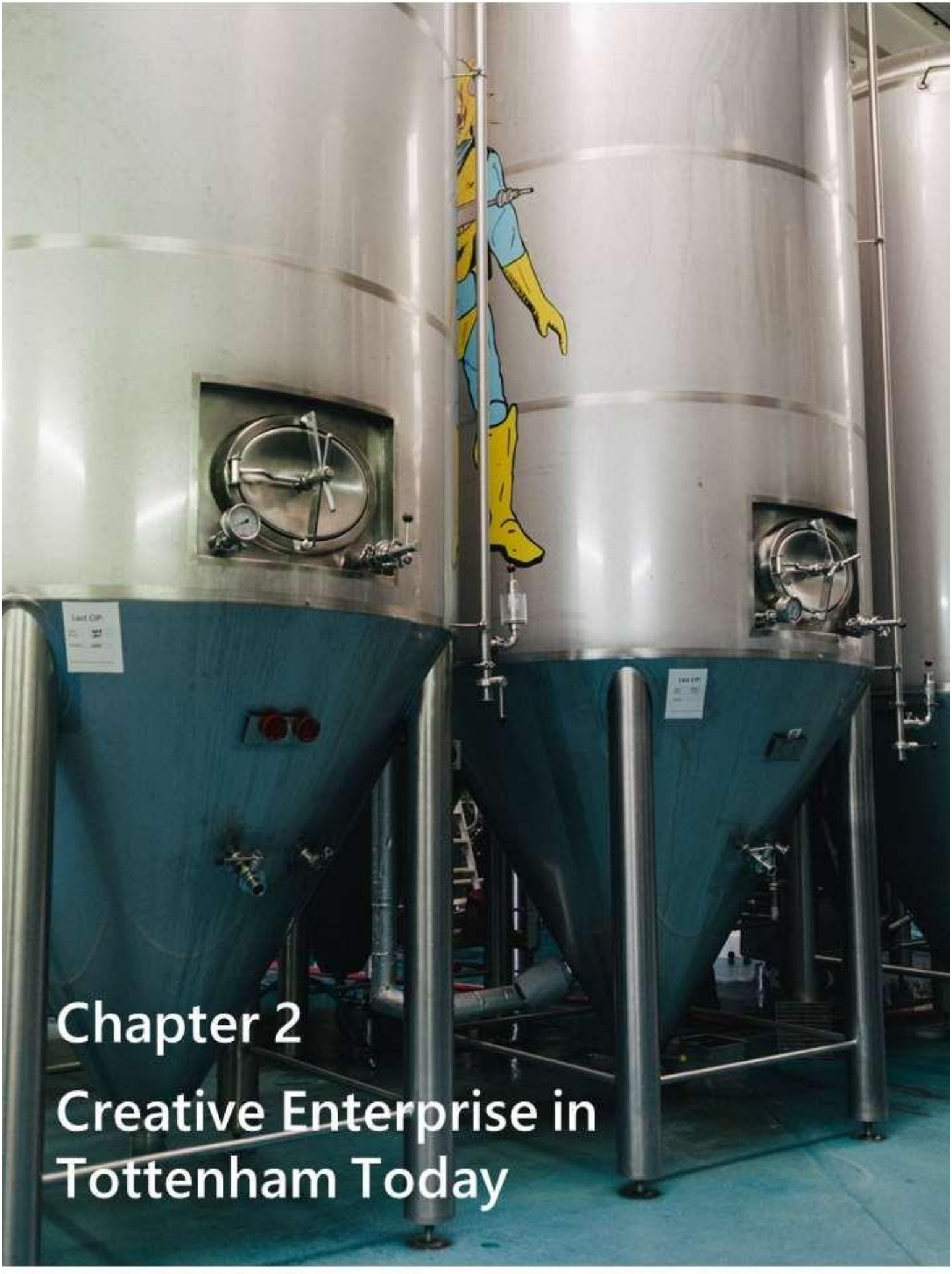
[1] Based on research from the Creative Industries Economic Estimates, DCMS (2015)

Scope

This report has informed the development of LB Haringey's action plan by providing a baseline of creative activity, as well as scoping recommendations on how it can be strengthened.

The objectives of the commission were to:

- Map the creative industries in Tottenham and identify emerging trends and clusters.
- Identify challenges and opportunities to the growth of Tottenham's creative economy.
- Produce a bank of tools to support the growth of Tottenham's creative economy.
- Inform the development of a Creative Enterprise Zone in Tottenham



Chapter 2
Creative Enterprise in Tottenham Today

2.1 Defining Creative Industries in Tottenham

The creative sector encompasses a diverse range of businesses, with activities across a wide range of industries. The 'creative' sector is an unconventional sector which can be difficult to define statistically due to a lack of reliable and universally understood data. The Department for Culture, Media and Sport (DCMS) first published its definition of the sector in 1998, with 13 subsectors such as performing arts, film, advertising and software.

Nesta's critique of the DCMS definition highlights that a definition solely focusing on industry types (as captured by SIC codes) is too exclusive and restrictive and cannot encapsulate the creative industries comprehensively. They have subsequently done further definition and mapping work to expand the DCMS definition. The work suggested that the focus must be put on occupations to reflect the full range and depth of the creative economy. This captures creative occupations like designers, illustrators and developers that are employed in 'non-creative' industries but still employed for their creative talent nonetheless.

Tottenham's Creative Profile

Pilot statistical analysis using this DCMS definition found that there was a limited amount of creative activity within Tottenham. However, this does not reflect the diverse creative activity taking place in Tottenham, which often fails to be captured by statistical definitions. To better reflect the size and type of creative activities taking place in Tottenham, we have added the fashion manufacturing sub-sector to our definition, in which there is a high proportion of creative activity in Tottenham.

Added to the DCMS definition previously shown, creates a new definition of the creative sector, which we have called the 'Tottenham's Creative Profile'. This better reflects the level of creative activity taking place in Tottenham.

This study goes further, in focusing on 'core' and 'supporting' creative activity. 'Core' creative activity encompasses the industries outlined by our 'Tottenham's Creative Profile definition'. This captures those activities which have a specific creative process. 'Supporting' creative activity encompasses industry sectors that are traditionally understood as 'non- creative' but that support 'core creative' activity through providing production processes, wholesale and retail channels, specific services, showcasing /promotion opportunities and contribute to the identity of place, as observed in Tottenham. This is broadly in line with Nesta's idea that some businesses may not be creative, but make a creative contribution.

Potential /Supporting Creative Activity

The inclusion of the ''supporting' creative business definition aims to:

- Redefine businesses that fall beyond the scope of DCMS definition but nonetheless should be categorised as 'core creative' due to the fact that they involve a significant level of creative-labour input.
- Capture businesses that fall beyond formal DCMS definitions of 'core creative' industries but are nonetheless part of the wider 'creative sector' ecosystem through potential networks/interdependencies between businesses.

These 'potential'/'supporting' creative businesses broadly fall within the following 5 activity sectors:

- Manufacturing
- Wholesale
- Retail
- Services
- Food & drink (incl. restaurants/cafes/bars/breweries)

To help partners decide whether these businesses are indeed 'Creative', a criteria has been set put in appendix A, designed to help partners determine if companies within the broad 'supporting' sector are part of the creative industries ecosystem.

2.2 What the statistics tell us



The remainder of this section sets out what the statistics tell us about creative businesses in Tottenham. It should be noted that whilst this is the most accurate profile which can be provided with available data, there are weaknesses in the available information – principally:

- The age of the most recent data
- Assumptions used in sample surveys such a BRES
- The fact that smaller businesses in managed workspace are less likely to be registered at their place of work

The creative sector (Core and Supporting) is one of the largest sectors in Tottenham, employing around 4,400 people within 660 businesses. Nearly a fifth of employment in Tottenham (17%) can be attributed to the core and supporting creative sectors.

Around 40% of Tottenham's creative activity occurs in the core creative sector. This accounts for around 1,800 jobs and 330 businesses in Tottenham and has experienced very strong employment growth over the last five years (+127%). This growth rate is the highest of all sectors in Tottenham.

The supporting creative sector is larger in Tottenham than the core creative sector, given the range of activities captured within the definition. Around 2,600 people are employed in this sector in 330 businesses. This sector has been much more stable over the last five years, with employment growth

of 1%.

Figure 2: Tottenham Employment by Sectors, 2015

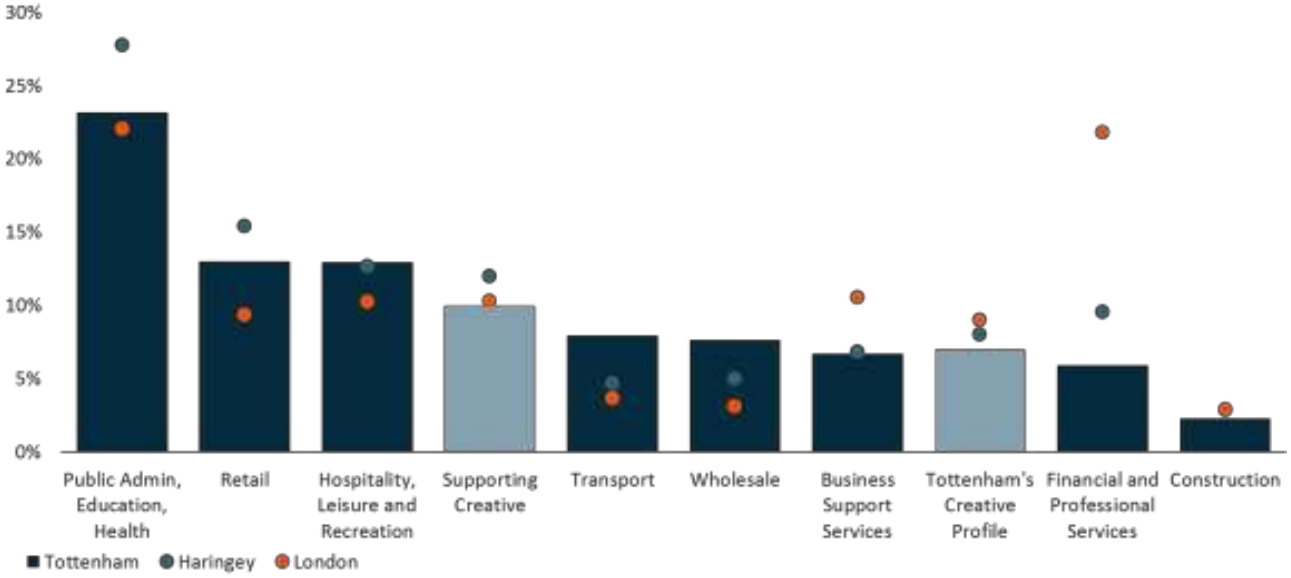
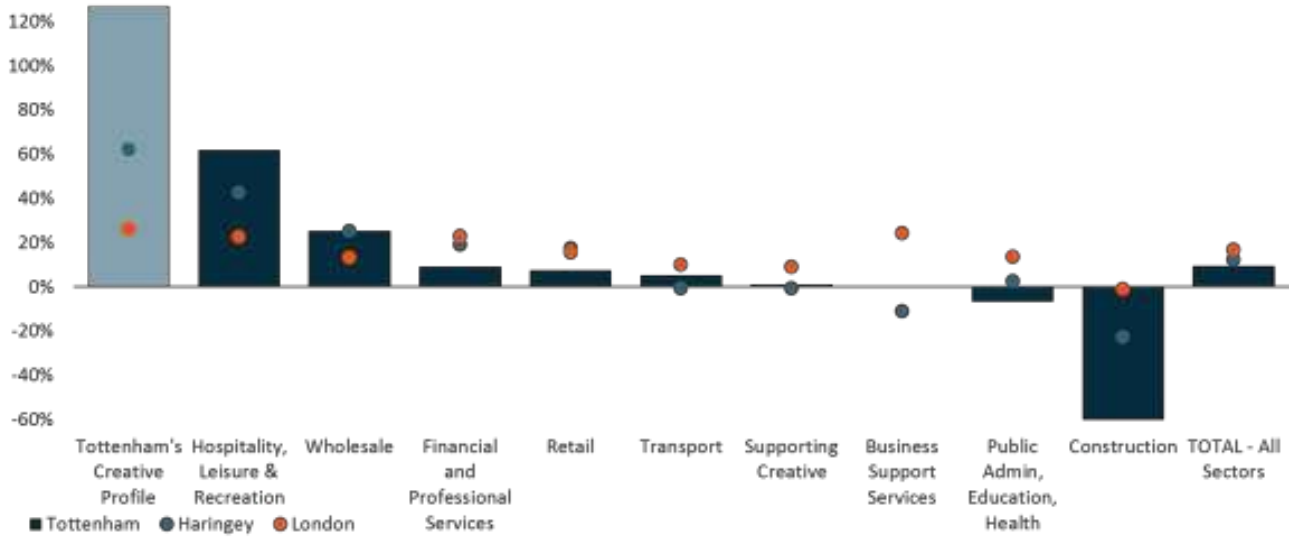


Figure 3: Employment Change across Tottenham's Sectors, 2010-2015



Source: Bres, 2015

A high proportion of industrial creative activity

To understand the spatial requirements of Tottenham's creative businesses, we have attached SIC definitions to industrial (light and heavy), desk-based and artist uses in Tottenham. The results show that the presence of many industrial estates along the Upper Lee Valley has influenced the type of creative activities taking place in Tottenham.

Around 72% of Tottenham's creative sector engages in industrial activities, a much higher proportion than across the North London boroughs (26%) and London (14%). Around a fifth of the remaining creative activity (18%) is made up of retail based employment, with desk based work (8%) and artists (2%) providing the smallest proportion of creative activity in the area.

Tottenham's creative businesses are typically very small

Businesses within Tottenham's creative sector are relatively small in size, especially those businesses in the core creative sector. Of these businesses, 91% employ fewer than four people, and none employ more than 50. By comparison, businesses in the supporting creative sector are generally larger, with 48% of businesses employing less than four people and 30% employing more than 10 people.

Creative employment occurs across Tottenham, although there are specific concentrations of larger creative businesses in the industrial estates around North Tottenham and Tottenham Hale.

Table 1: Creative Activity in Tottenham's Sub Areas

	Core Creative		Supporting Creative	
	Employment	Business	Employment	Business
North Tottenham	36%	22%	38%	32%
Seven Sisters & Tottenham Green	12%	33%	16%	34%
Tottenham Hale	52%	44%	47%	34%

Source: IDBR, 2016

The maps below show the concentrations of businesses (left) and employment (right). There are several interesting observations, with core creative businesses primarily located around Tottenham Hale and Tottenham Green, larger supporting creative businesses located in the industrial estates in the East of Tottenham and smaller supporting creative businesses located along High Road.

Figure 4: Location of creative businesses

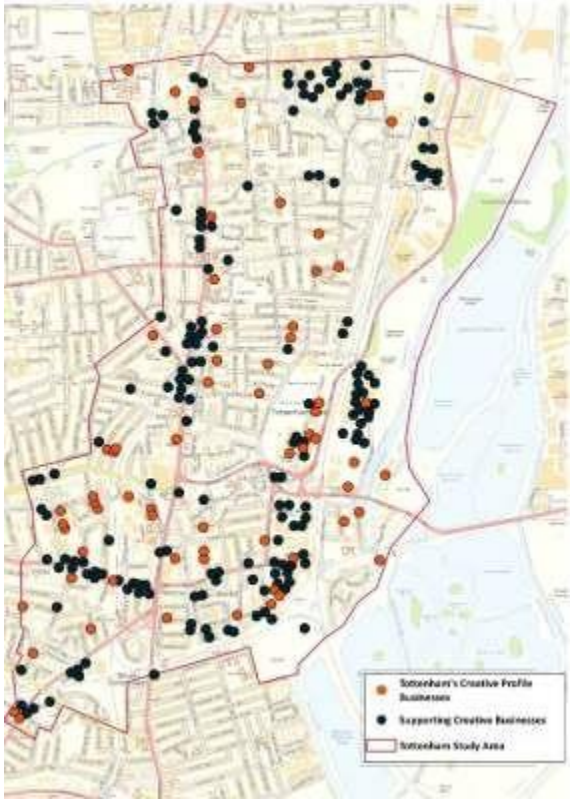


Figure 5: Location of Creative Employment



Key sub-sector specialisms which give Tottenham a distinct identity

The diversity of Tottenham's creative sector is shaped by its sub-sectors. Relative to employment levels across London, Tottenham has a strong sub-sector specialism in fashion manufacturing (with 20.8 times more employment proportionally compared to London). It is the largest core creative sub-sector in Tottenham, employing 1,200 people and has experienced a two-fold increase in employment in the last five years. Other prominent sub-sectors include IT, software and computer services (200 jobs), design (70 jobs) and film, TV, video, radio & photography (70 jobs).

Table 2: Tottenham's Core Creative Sub-Sector Specialisations (2010-2015)

Sub-Sector	Tottenham		North London Boroughs		London
	Spec.	% change	Spec.	% change	% change
Advertising & Marketing	0.1	-17%*	0.2	-14%	+36%
Architecture	0.1	+57%*	0.4	+96%	+43%
Crafts	0.0	-100%*	0.6	-64%	-17%
Design	0.9	+25%	0.6	+40%	+43%
Fashion Manufacturing	20.8	+201%	3.9	+111%	+82%
Film, TV, video, radio & photography	0.2	+73%	0.3	+25%	+21%
IT, software & computer services	0.3	+57%	0.6	+23%	+37%
Museums, galleries & libraries	0.4	-6%*	0.6	-38%	-8%
Music, performing & visual arts	0.2	+43%	0.6	+49%	+29%
Publishing	0.2	+31%	0.2	-13%	-2%
Creative TOTAL	**0.7**	**+125%**	**0.5**	**+27%**	**+27%**

Note:Using Tottenham's Creative Profile Definition; Numbers show the specialisation (location quotient) of the sub-sector in an area relative to London. A score above 1 shows that there is a higher specialisation of activity in the sub-sector in an area compared to across London – these are highlighted in blue.

% change 2010-15 (% change in employment between 2010 and 2015): * = small sample size (less than 20 employees); Cells highlighted blue have employment growth of greater than 50% over the last five years.

Growth in Higher Value Creative Sub-Sectors

Tottenham has experienced strong recent growth in higher value creative sub-sectors[6] including film, TV, video, radio & photography (+73% in the last five years) IT, software and computer services (+57%) and publishing (+31%). All these sub-sectors currently have a relatively small presence in Tottenham (combined they account for 18% of creative employment), however their recent growth suggests they have a large amount of potential in the future, when they could be much bigger contributors to a prosperous local economy.

Increasing pressure on industrial and office space

The affordability and availability of space is important for understanding the environment in which creative businesses operate. CoStar data has been analysed to understand past and present performance of commercial property. This has been broken down by office and industrial units, which are the most relevant to the core and supporting creative sector with 74% of creative activities in Tottenham being classified as industrial activities.

Evidence suggests there has been an increase in demand for office space in Tottenham over the last four years, with the vacancy rate falling from 8% in 2013 to 2% in 2016. This increased demand has not currently been reflected in rental values, with these remaining stable over the last five years. Tottenham has consistently had a low industrial vacancy rate, with less than 1% of industrial space currently vacant (compared to 3% across London). Industrial rental values in Tottenham have been increasing over the last five years, with the strongest growth occurring between 2014 and 2015. The average rental value for industrial space in Tottenham is £13 per sqft, higher than across London (£10). Rental values for Tottenham's industrial units are now 42% higher than they were in 2011, a faster growth rate than across London (29%).

Tottenham has a low skilled workforce, but high profile education institutions

General skill levels in Tottenham are relatively low compared to across Haringey and London. The most recent detailed skills data (Census 2011) shows that all areas within Tottenham have a lower proportion of people qualified to NVQ Level 2+ (equivalent to 5 or more GCSEs grade A*-C) than the Haringey and London level.

Across the whole of Haringey, there has been little change in qualification levels between 2011 and 2015. The Annual Population Survey finds that it has increased by 0.8% points in Haringey since 2011, compared to an increase of 5.0% points across London

Local creative businesses report a number of challenges they currently face when recruiting. Some of the creative skills required by businesses already exist in the local labour market (e.g. social media, entrepreneurial skills), however local people are often unaware of the employment opportunities available in the creative sector. This points towards a need to improve careers guidance to reflect the types of employers locally. Additionally, businesses reported that there is a lack of practical skills in Tottenham, which are often not provided through the traditional education system. Apprenticeships have been cited as a way of instilling creative knowledge into young people, alongside gaining practical knowledge in the workplace.

Table 3: Current Creative Skills Provision in Tottenham

Institution	Subject
National College for Digital Skills	Core Digital ADA Curriculum
The College of Haringey, Enfield and North East London	ICT and Computing, Creative and Media, examples include: Media Production Digital Games Design and Development IT & Telecoms
Haringey 6th Form College	Media studies Art and Media ICT & Creative Technology Creative Media Production
Big Creative Education	Creative Media Games Design Music Practice Music Production Fashion & Styling Performing Arts
The London School of Furniture Making	Adult courses on furniture making
Informal and Formal Networks	Various provision of education and taster courses

A range of business support is available, but not specific to the creative sector

There is a range of business support opportunities available to businesses in Tottenham. Some of this is provided by the council whereas others are privately-provided. The table below provides a summary of some of the main business support schemes available, however none of these are provided specifically for creative businesses in Tottenham.

Table 4: Business Support Opportunities for Tottenham's Creative Businesses

Name	Description
Opportunity Investment Fund	A £3.65m programme to enable investment in workspace and employment projects in Tottenham
639 Enterprise Centre	Offers start-up support and mentoring
Bernie Grant Arts Centre	Support for entrepreneurs
Workspace Based support	linked to managed workspace

Informal Networks	Evidence of large numbers of these taking place (e.g. around Gourley Triangle)
Wider Reach:	
Federation of Small Businesses	Offering small business advice, financial expertise and support
North London Chamber of Commerce	Offers advice, information and networking opportunities to North London businesses
Enterprise for London	Provide business advice, business training and access to finance across London
Small Business Network	Business networking opportunities in North London
National Enterprise Network	Membership body representing those in the enterprise support sector across England

Statistical Summary

- Tottenham has a strong and growing core creative economy, supported by a well- established supporting creative ecosystem.
- The area's industrial environment is reflected in the creative sector, with a high proportion of activity in industrial creative activities.
- Tottenham's greatest sub-sector specialism is in fashion manufacturing.

Although this statistical evidence supports the anecdotal evidence of a growing creative economy developing in Tottenham, it does not truly capture the full scale of all creative activity taking place in the area. This occurs for several reasons:

Official datasets (e.g. BRES) do not capture businesses who are not VAT or PAYE registered[7]. Many creative businesses are small by nature (as shown by the evidence above), and many will be missed in official datasets.

Given the caveats around the statistical evidence and the importance of establishing a 'live' database of creative activity in Tottenham, further 'on-the-ground' research has been undertaken to get ahead of the data and provide a more accurate representation of creative activity in Tottenham.

[7]A business must register for VAT when their turnover exceeds £85,000

2.3 Observing Creative Enterprise in Tottenham

The approach to the ground level research and evidence emerging from the observational analysis reflects the varying and contrasting geographies that make up the overall study area. The proposed CEZ Pathfinder boundary extends over a significant geographical area overlapping with the boundaries of the Tottenham Area Action Plan and encompasses distinctive sub-areas.

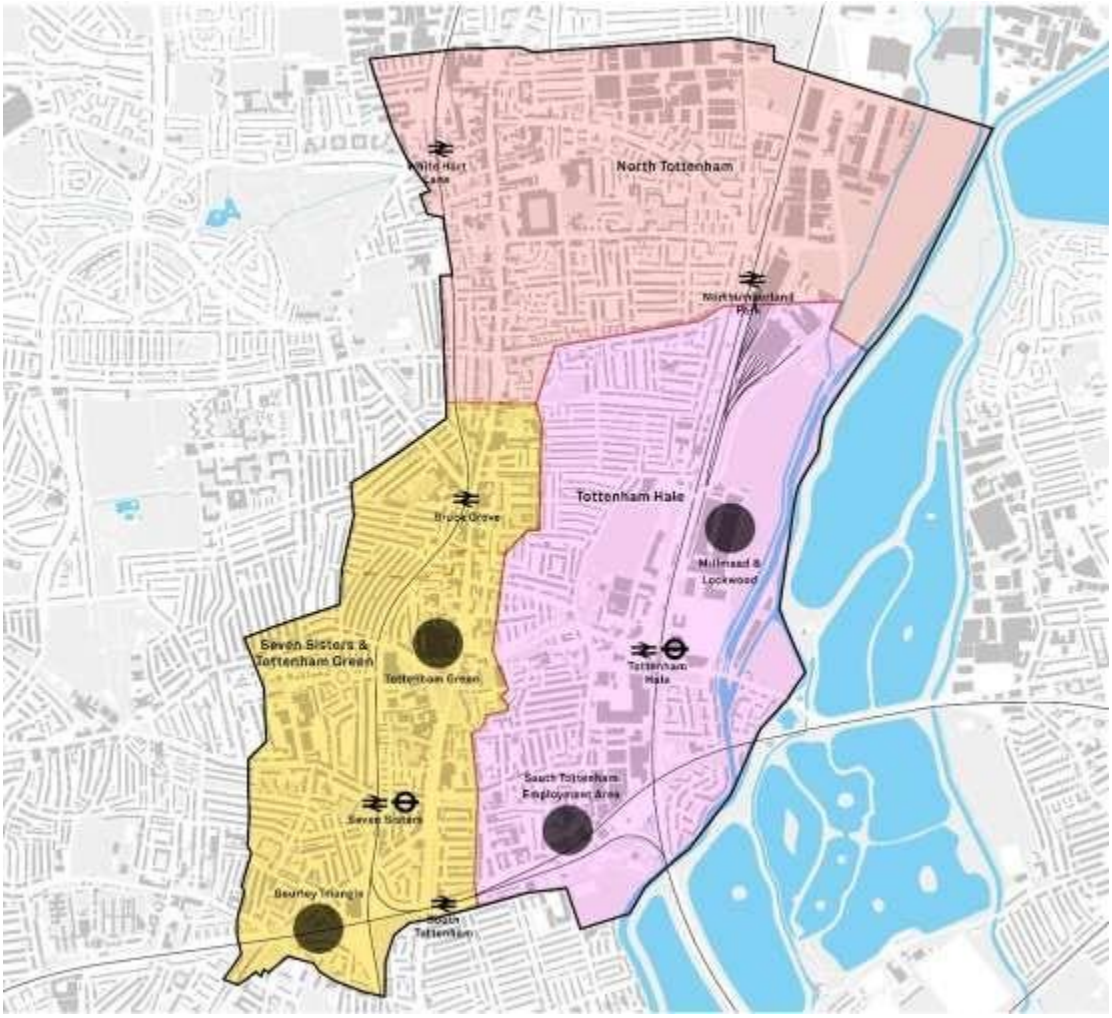
To overcome some of the weaknesses in the data and provide a better understanding of the currently activity, We Made That's urban research has visited key locations in the area. This additional ground-level research and observational analysis has uncovered some geographic and sector-specific clustering of creative activity across each sub-area, with most of the activity located in the south of the overall study area.

Overlaying the regeneration landscape highlights area-specific sets of development pressures overlapping with identified clusters of creative activity. These development pressures vary in scale, level of threat and time frame. Whilst some clusters of activity benefit from a reasonable level of protection through planning policy, others are much more vulnerable to redevelopment endeavours, introducing a high-level of uncertainty to continued business activity.

Formal ‘area-based’ workshops with local businesses were held in each identified cluster of creative activity to establish key themes of Haringey's current creative economy landscape and identify the nuances of trends, threats and change affecting each location.

The following section is an overview of the findings emerging through the ground-level research and observational analysis as well as from workshops in each of the four identifies creative clusters.

Figure 6: Sub-Areas and identified areas of creative activity





Chapter 3
Creative Clusters

2.4 Creative Cluster: Gourley Triangle

Gourley Triangle is a pocket of industrial workspace provision featuring core and supporting creative activity, notably a clustering of fashion-design businesses. The area is defined by strong business networks, which have contributed to business growth as well as the promotion of the area's production. Of all identified sites of creative activity, the Gourley Triangle currently faces the highest level of uncertainty in terms of continued activity due to its lack of policy protection.

Activity

Core creative activity in the Gourley Triangle includes several fashion design businesses, with high-end labels being designed and assembled on site. Fashion design activities are supported through specialised production such as textile design and screen-printing as well clothing manufacturing and fashion retail activities, which also occur on site. In addition, a fabrication/design studio (Studio I AM) produces installations and displays for advertisement/retail and gallery interiors/exhibition displays for key cultural institutions such as the Barbican and the TATE. The area also features a large-scale photography studio for hire.

Figure 7: Hyper-clustering of creative activity, notably of fashion design & manufacturing



Workspace typology

The typology of workspace in the Gourley triangle accommodating creative activity is largely made up of:

- Small industrial/warehouse space (B2/B8)
- Small creative studio spaces (B1b/B1c)

Most of the observed creative activity on site is located within two 3-storey industrial buildings on Seven Sisters Road, which were previously derelict and have been refurbished by workspace providers (PJR) and individual businesses to accommodate a range of creative uses. PJR's contacts in the fashion industry have resulted in most of the units being populated by fashion-related businesses.

The ground level units accommodate small-scale fashion manufacturing and set fabrication/design in industrial spaces. These businesses have a range of specific spatial requirements such as higher ceilings need preferred ground floor location, which relate to the need to accommodate equipment and production; these include metal & wood fabrication, casting, sand-blasting, screen-printing, industrial sewing equipment, pattern cutting tables, etc. Finding suitable workspace is a challenge for these 'space-hungry' businesses. Within the same buildings, upper levels have been converted into more creative studio-type spaces (B1c), which accommodate fashion-design activities.

Networks and Links

The Gourley Triangle features an integrated network of businesses that also serves to promote and showcase production. Some of the fashion production is on sale in a retail unit adjacent to where the design and manufacturing occurs. Tottenham Textiles has developed a 'Seven Sisters Row' brand, referencing Mayfair's Savile Row. A 'Made in Tottenham' fashion brand called 'Seven Sisters Row' has been developed for some of the fashion production, referencing Mayfair's Savile Row.

External networks include links to key cultural institutions and industry partners. Businesses on site provide 'time-banking' arrangements, where Central Saint Martins fashion students can use the equipment for the collection in exchange for a day of work.

Threats

The area is currently facing a high-level of redevelopment pressures, which is a threat to continued business activity. The uncertainty surrounding potential redevelopment is currently stifling business growth. Businesses report having reached the point of expansion and turning down work due to a lack of capacity; they have the willingness and capital to expand but are currently withholding further investment in the site.

Opportunities

The type of activity, strength of business networks and capacity for expansion underlines the Gourley Triangle as a site with incredible potential for creative activity growth. Beyond this, the area also has the potential for increased social value of activity through routes to local employment and support of emerging talent. Businesses have expressed the desire for more formalised apprenticeship schemes for local young people through links with local colleges (i.e. Fashion Academy). These can support employment routes into the industry and develop a range of skills. Businesses have also expressed the desire for a platform to showcase local creative talent. can use the equipment to work on their collections in exchange for a day of work. Businesses also host cohorts of CSM students and provide help with their final collections.

Figure 8: Wide range of making – workspace in the Gourley Triangle accommodates various



Figure 9: Time-banking; fashion students trade a day of work for the use of equipment



Figure 10: ‘One stop’ destination for production- Tottenham Textiles and Studio I AM.



2.5 Creative Cluster 2: Tottenham Green

This area is defined by clustering of civic, cultural and community institutions around Tottenham Green but also by dispersed creative activity in and around the High Road. Some of the workspace provision hosting key creative businesses in the area such as Tottenham Green Workshops is council-owned.

Activity

Tottenham Green features some of the borough’s key cultural, community and civic uses. This includes the Bernie Grant Arts Centre (BGAC) arguably the most important cultural hub in the east of the Borough. As such, the area presents cultural infrastructure for creative consumption and features activities such as music, performing & visual arts. Core creative activity on site includes photography, sound recording, fashion/jewellery design and graphic design. Some of the businesses on site are in their infancy and accommodated in dedicated incubator space (including at Tottenham Green Workshops and the BGAC Enterprisse Centre). Others, such as Alex Rouse & Sylvia Weatherburn, wigs and hairpiece makers for film, theatre & television, are long established in the area. Notably, these businesses benefit from international reputations and strong ties into to industry, having worked on productions such as Harry Potter and Game of Thrones.

There are a number of businesses in the area that support local creative businesses through promotion, showcasing and events such as Chickentown, Tottenham Green Market and Blighty Coffee.

Figure11: Long-established making in Tottenham Green Workshops



Workspace typology

In terms of workspace typology, Tottenham Green differs from other sites of opportunity within the study area given the dominance of high street fabric and uses. The workspace typologies accommodating creative activity in the area include:

- Retail (A).
- Small office space (B1); Incubator space (B1a/B1b).
- Bespoke refurbishments to delivering units that are similar to small creative studio (B1b/B1c)

Tottenham Green Enterprise Centre managed by the London Youth Support Trust (LYST) provides incubator space for young start-ups (typically B1a/B1b). It provides individual workspace units on shorter-term leases and individual business support. While the provision is not directly targeted at creative uses, the Tottenham Green Enterprise Centre accommodates a number of desk-based creative businesses.

The Bernie Grant Enterprise Centre (BGAC) provides workspace targeted at creative businesses accommodated in shared units (for start-ups and sole traders) and small workspace units (typically B1a/B1b). These units accommodate largely desk-based activities but tenants can also access the Bernie Grant Arts Centre rehearsal spaces, exhibition and performance spaces at subsidised rates. Workspace provision in Tottenham Green is also provided through council-owned assets such as

Tottenham Green Workshops, where a refurbished school provides units with similar spatial characteristics to small creative studios (B1b/B1c). Emerging independent provision in the area also includes Blighty Coffee, located in a high street retail space (A3) with small office spaces on the upper level.

There is a sense amongst local businesses and institutions such as LYST and BGAC that creative businesses in the area are largely dispersed and do not interact much with each other; there is a reported lack of knowledge of the type of creative activity occurring in the area. There is a perception that new workspace provision (i.e. Blighty Coffee) is providing a space where links between businesses can be fostered, either through its co-working space or café. A number of events and workshops are held in Blighty Coffee's premises.

Threats

Tenants have invested considerably in the premises and want to remain established in the area but feel issues related to tenure security is are a threat to continued activity.

Opportunities

Cultural institutions and creative businesses in Tottenham Green report the need to raise the profile of the area both as a site of creative production and as a creative/cultural destination in its own right. There is a sense that the range of creative activity in the area is unknown to the wider public, and even within the creative business community itself. Businesses recognise the potential for retail channels and the food and drink offer in the area to further support a creative identity of place. There is an expressed desire for coordinated efforts in promoting the area's creative production.

Figure 12: Notable Creative Activity in Unexpected locations



2.6 Creative Cluster: Millmead & Lockwood

The area features a number of established manufacturing businesses but also a recent influx of creative businesses. The supporting role of manufacturing businesses is key to the area's creative ecosystems. The area is designated as Strategic Industrial Land and therefore businesses on site benefit from the security of planning protection. Challenges to growth of creative industries on site relate mostly to the availability and suitability of workspace provision.

Activity

Given the industrial nature of the area, activity on site includes a large number of supporting creative businesses within more traditional manufacturing activities such as bespoke furniture making, clothing manufacturing, printing and brewing. While most of these businesses supply the local production chain, brewing stands out as a supporting creative activity that contributes to an identity of place.

Beavertown Brewry, Located in Lockwood Industrial Estate, presents a strong visual identity recognised throughout London and abroad and attracts a significant amount of visitors to the area.

There is an emerging clustering of music/sound recording and post-production studios in the area, some of which have recently relocated from Soho. These industries are highly valuable and individual businesses work on large-scale UK and international film and television productions.

Figure 13: Sound recording business Sound Disposition records all background sounds for film and television in-house



Workspace typology

The Millmead & Lockwood industrial estates make-up 8.2 Ha of Strategic Industrial Land. The building stock is composed exclusively of terraced industrial units with the exception of the Millmead Business Centre. Most of the creative activity on site is accommodated in:

- Small industrial/warehouse type space (B2/B8)
- Large industrial/warehouse type space (B2/B8)

Business units provided in the Millmead Business Centre accommodate music and sound- related activities, which have specific fit-out requirements. Sound recording activities require extensive sound proofing of premises and are incompatible with noisy uses.

Emerging core creative activity on site can be found in new provision of individual studios in subdivided larger industrial unit. The Papertank Collective, an independent workspace provider, manages the premises and caters mostly to desk-based creative uses.

Larger-scale industrial units (B2/B8) accommodate supporting creative uses such as printing and brewing, which have 'space-hungry' production processes. Brewing especially has extensive fit-out needs such as raised floors and waterways.

Given the spatial requirements of a number of core and supporting creative activities on site, businesses have expressed the need for a better line of enquiry for workspace; a way to facilitate knowledge of current availability of industrial space and related level of fit-out.

Figure 14:High-value equipment and extensive fit-out; sound recording businesses require soundproofing and state-of-the art equipment



Networks and links

Links between businesses in Millmead & Lockwood are limited although there is some local sourcing; printing manufacturing businesses are used by a number of businesses on site for jobs related to branding, design and marketing.

Sound recording companies have external links to more established locations for their industry such as Abbey Road and Soho, where they undertake the more client-facing aspects of their work. Big production companies expect a certain level of specification and amenities that the area currently does not meet. On some contracts, businesses will undertake the bulk of the work in their own studios but will hire out higher-spec studios to host clients for the final touches.

As previously mentioned, Beavertown's reputation draws many visitors to the site through its taproom and has networks extending throughout London and abroad. The brewery often collaborates with other UK-based breweries or international breweries on specific beer production

Figure 15: Through collaborations, events and its tap-room, Beavertown's networks attract visitors to the area and extend back out to London and abroad



Challenges

Availability and suitability of space is a challenge for businesses in the area. Industrial workspace is difficult to find, especially without prior knowledge of the area. Even if space is available, the suitability of space remains an issue for businesses requiring specific fit- outs to the premises. This is an issue for businesses that are looking to expand in the area such as sound recording companies. Beavertown

brewery is also currently looking to expand, having reached capacity in its current premises.

Security and management of the industrial estates is an issue for businesses with specialised equipment where there have been reported issues with breaking and entering. Finding local skilled staff is also a challenge for most businesses on site; bespoke furniture makers and manufacturers require specialist skills, which they cannot find within the local workforce. Brewing qualifications are hard to obtain and brewers hard to come by as there is only one brewing qualification course in the UK, located in Ireland.

Figure 16: Beavertown brewery is looking to expand, having outgrown its current premises



Opportunities

There is a need for an improved access to knowledge about available workspace in the area and increased support for businesses looking to expand. Better management of estates with regards to security as well as increased amenities on site would benefit some of the more high-value and client-facing businesses on site. There is also an opportunity to develop apprenticeship schemes in tandem with local business to bridge to local skills gap.

2.7 Creative Cluster: South Tottenham Employment Area

The South Tottenham Employment Area features the largest identified range of core creative businesses and intensity of core creative activities. Refurbished industrial buildings converted into individual artist studios and maker spaces by workspace providers define the area. A number of workspace and residential schemes are already underway in the area, with close council involvement. Creative activity is likely to remain a defining feature of the area, although specific businesses might change due to shifts in affordability or due to the transient nature of some of the tenancies.

Activity

There is broad range of core creative activities on site, which include graphic design and photography, music recording, publishing, individual visual art practices and making. There is a sense that the growth of the creative industries in the area is fuelled by the loss of affordable workspace in other locations such as Hackney but also further afield.

Notably, the area also features various creative manufacturing activities such as bespoke furniture making and set building/design. This production supplies significant cultural institutions and creative businesses across London. Cloud & Horse, located in the High Cross Centre, is involved in the design and production of studio set builds/ props/displays for companies such as the BBC, Vogue and Stella McCartney.

Figure 17: Back-of-House set-building workshop



Workspace typology

The South Tottenham Employment Area is mostly defined by industrial building stock and part of the area is designated as a Locally Significant Industrial Site (comprising Fountayne Road, Markfield Road and Constable Crescent). Creative activity on site is largely accommodated in:

- Small creative studio (B1b/B1c)
- Small industrial/warehouse space (B2/B8), which includes maker space.
- Large industrial/warehouse space (B2/B8)

A significant amount of core creative activity on site is housed within larger industrial stock, which has been subdivided by workspace providers to supply a range of small, individual workspace units. Some of the provision is targeted directly at artists through small creative studios; these are generally small, cellular spaces around 100 sq.ft. Tenants are likely to be highly price-sensitive and therefore larger buildings allow for critical mass and keep running costs as low as possible. Provision of small creative studios also accommodates both small- scale makers and desk-based creative activities. Given the small-scale of some of the desk- based creative businesses (freelancers, sole traders), individual units can be shared.

Different models of workspace provision on site include the integration of both 'front-end' uses and 'back-end' production uses within the same premises. Cloud & Horse, features both large-scale production workshops and high-end photography studios within its premises. The photography studios are hired-out for photography and film shoots, some of which feature Cloud & Horse's own set/props production. Other examples of integrated 'front-end'/'back-end' uses include gallery spaces integrated within creative studio provision to showcase tenants' work.

Other workspace provision models involve shared space and equipment for makers. Williams Ridout (bespoke furniture designers/makers) rent out space in their workshop to individuals starting out in the industry. They have plans to open another shared workshop in 2018 to run in conjunction with their existing premises on Fountayne Road. This 'maker space' model allows for collaborative/collective making and accommodates small- to medium scale making and product development.

Networks and links

The opening of Craving Coffee in Gaunson House has fostered and consolidated business networks by introducing a social space to the area. It has also provided improved local amenities for businesses operating in the area. Businesses report that they can source most of what they need for business operations locally. This includes materials for production but also supporting services such as printing. There is an informal network of support that exists between businesses. Businesses rely on 'word-of-mouth' to find workspace and for referrals.

Threats

There are a number of schemes coming forward in the area, which have a potential associated impact on affordability. There is a reported need to maintain a range of workspace typologies in the area to continue to accommodate a range of uses. Many businesses report needing workspace that offers some flexibility of use. Affordability threats are perceived to both workspace provision and housing. A significant amount of businesses operating in the STEA also live locally.

Opportunities

Existing initiatives, mainly provided through Craving Coffee sustain an identity of place in the area and help to develop and strengthen business networks. There is an opportunity to further support and promote these initiatives. Some businesses on site have public-facing aspects to their business such as hireable photography studios and businesses on site also showcase their brand and business activity through a range of events and merchandise.

There is willingness amongst businesses to take on apprentices but more support is needed in terms of how this is implemented and how some of the associated strains on businesses can be mitigated.

Figure 18: Creative activity in unexpected locations



Figure 19: A set-building business, showcases its activity through retail and branding



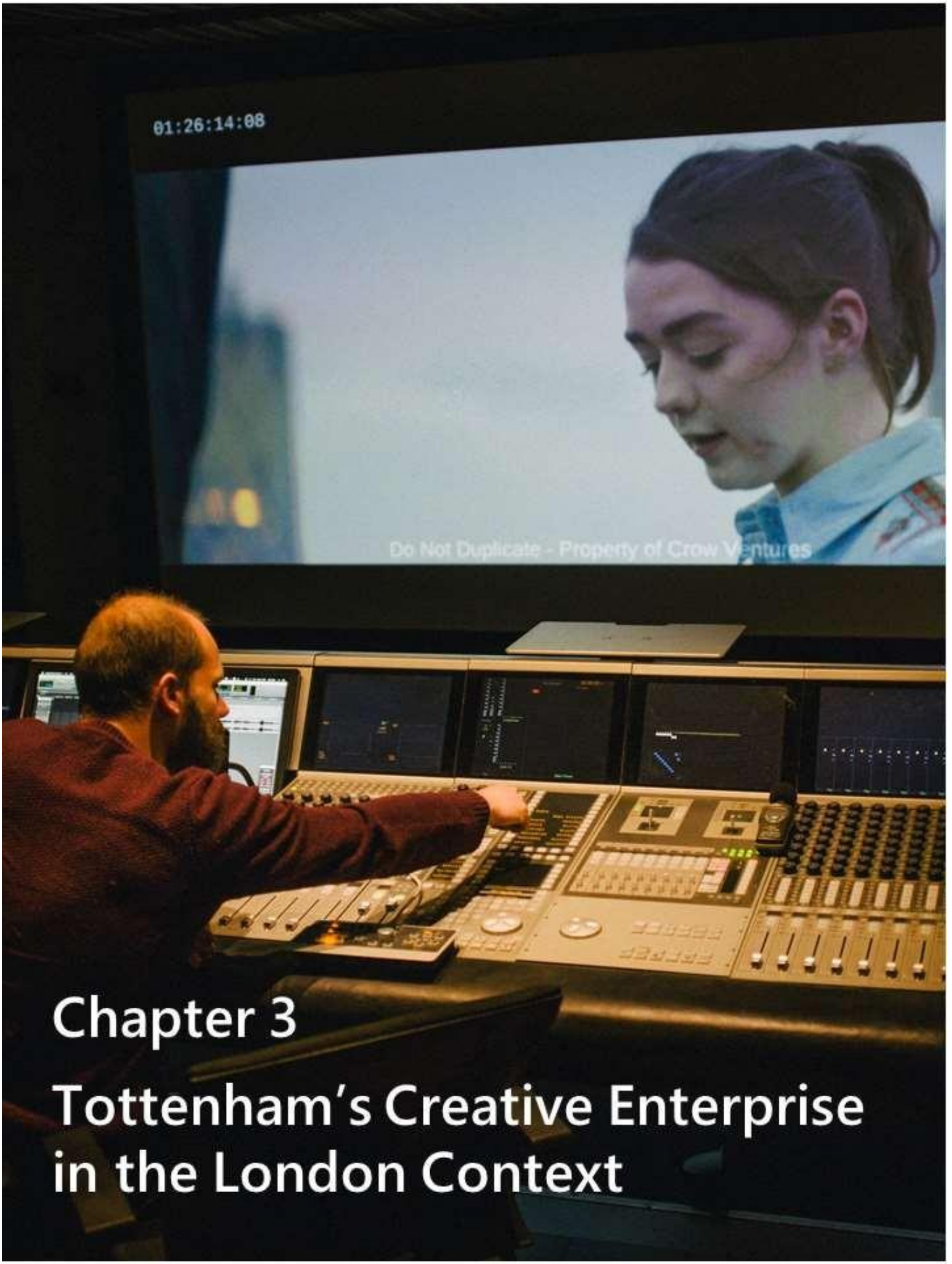
2.8 Cross Cutting Activity – Small Scale Making and Manufacturing

A relatively unique feature of Tottenham's Creative economy is the (historic) prominence of individual makers as well as small manufacturing companies supported by a relatively high percentage of workshop and warehouse type spaces.

Significantly, these makers and small-scale manufacturers rely on creative processes and creative workforce with specialist skills, as they are involved in design and conception stages as well as production activities. Currently, making and small-scale manufacturing in Tottenham includes a range of activities across various locations and certain specialisms are beginning to emerge, both in terms of the type of production activities and in terms of the industries that this production supports.

Making and small-scale manufacturing in Tottenham is strongly embedded in the TV, film and advertising sectors. There are significant emerging set design/production and installation design/fabrication businesses such as Cloud & Horse in the South Tottenham Employment area and Studio I AM in the Gourley Triangle. These businesses utilise skills of design, carpentry and model making, fabrication and scenic painting to conceptualise and produce anything from small-scale studio sets, backdrops, props, retail window displays, etc. These businesses also support London's major cultural institutions through installation work such as gallery interiors and exhibition displays. Clients include The V&A, National Theatre, The Barbican, Somerset House, The British Museum, etcFashion design/manufacturing is also a key specialism within Tottenham, with individual couture collections being designed and assembled by various businesses in the Gourley Triangle. Other types of specialised production such as screen-printing and textile design and manufacturing also occurs on site which further supports fashion design activities.

Both set/installation design/production and fashion design/manufacturing rely on workspace that can accommodate a range of equipment and production processes. Other activities in Tottenham with similar spatial needs and production requirements include bespoke furniture design/making with businesses such as The London School of Furniture Making & Williams Ridout, both located in the South Tottenham Employment area.



Chapter 3

Tottenham's Creative Enterprise in the London Context

3.1 Tottenham's Creative Enterprise in the London Context

To understand how Tottenham is performing relative to other creative areas, and what comparative advantages it has, three other areas have been examined to understand the role of the creative sector in each and how Tottenham compares.

This helps to position Tottenham within the London creative economy and develop tools which can be used to support its future development. The areas, and reasons for their selection, are described below. In addition, wider sub-regional and regional geographies have been examined to understand how Tottenham's creative industries are performing in relation to its sub-regional context.

For the purposes of this study, North London Boroughs (consisting of Haringey, Enfield, Waltham Forest and Barnet) have been analysed alongside the Greater London region. The three neighbourhoods selected as comparator areas are:

Table 5: Comparator Areas

Area	Reason for Inclusion
Hackney / Dalston	Area in close geographical proximity to Tottenham, with a history of activity in the creative sector. Home to several creative sites, including the Hackney Creative Collective. A well-established creative cluster, which can provide lessons on sector development.
Croydon	Has experienced similar levels of investment in recent years following from the 2011 riots. Number of creative activities taking place in the area, including Matthew's Yard and Croydon Creatives.
Bermondsey/ Deptford	Rapidly growing clusters of creative sector enterprises, with concentrations around Maltby Street, Deptford and the New Cross area. A diverse area (like Tottenham), with office-led development in Bermondsey and industrial-led development towards Deptford.

Tottenham's Relative Performance

Relative to the comparator areas, Tottenham has one of the smallest core creative sectors, employing 1,800 people. Bermondsey / Deptford and Hackney / Dalston have much larger core creative sectors, however they are more established in these areas and cover larger geographical areas.

Tottenham's creative sector accounts for a relatively high proportion of employment

Although Tottenham has a relatively small creative sector, the creative sector accounts for a higher proportion of total employment than Croydon and a similar proportion to Bermondsey/Deptford. Hackney / Dalston has a higher proportion of activity in the creative sector. Tottenham's strength is that it has a relatively large core creative sector accompanied by a large supporting creative sector, which accounts for over 10% of employment in the area. This proportion is similar to Hackney/Dalston, and higher than in Bermondsey/Deptford.

Table 6: Creative Employment and Businesses in Tottenham and Comparator Areas

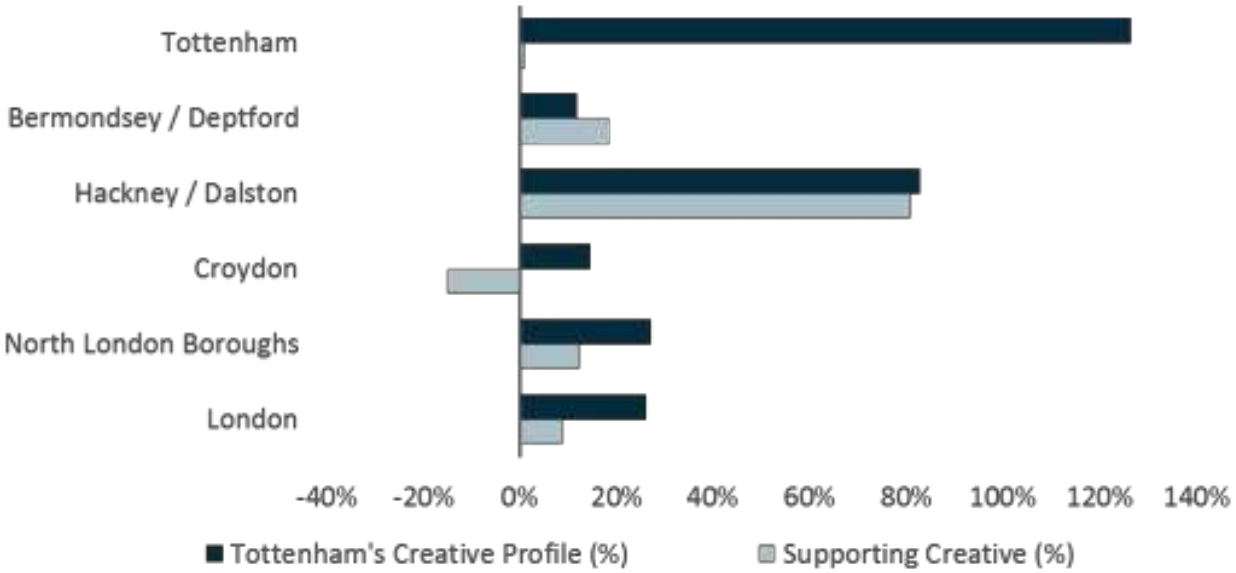
Definition	Tottenham's Creative Profile		Supporting Creative	
	Employment	Businesses	Employment	Businesses
Tottenham	1,800	330	2,600	340
Bermondsey / Deptford	5,100	1,000	6,100	490
Hackney / Dalston	3,300	1,800	3,200	530
Croydon	1,800	400	4,900	460
Haringey	5,700	2,800	8,000	1,300
North London Boroughs	18,700	9,300	39,100	6,200
London	476,700	96,000	507,000	54,300

Source: BRES, 2015; UK Business Count, 2016

Strong growth in Tottenham's core creative sector

Tottenham's core creative sector has been growing at a rapid rate in recent years, with the area having the highest employment growth rate over the last five years. The creative sector has more than doubled in Tottenham in the last five years (+125%), higher than that experienced in Hackney/Dalston (+83%), Croydon (+15%) and Bermondsey/Deptford (+12%).

Figure 20: Percentage Employment Change, 2010-15

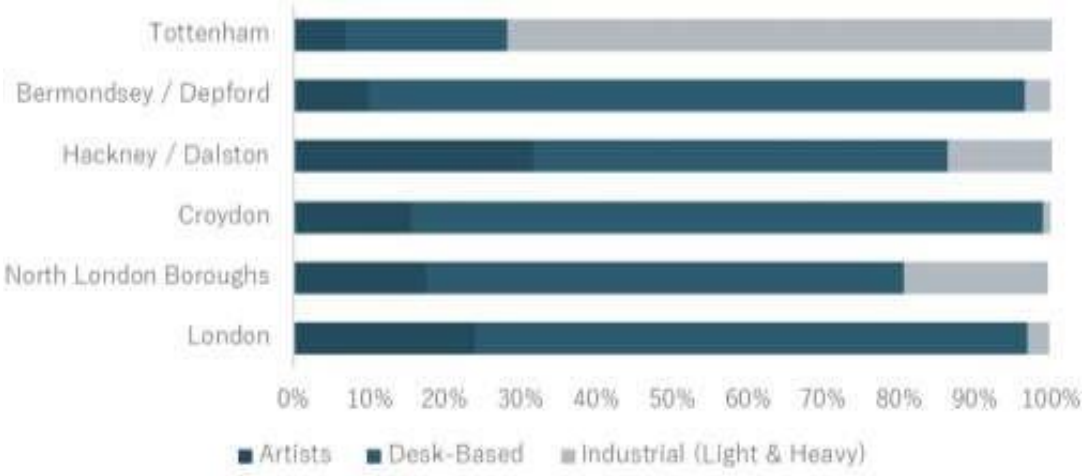


Source: BRES, 2015

Industrial nature of Tottenham's creative sector makes it distinct

The presence of several industrial estates in Tottenham has influenced the type of creative activities taking place in the area relative to the comparator areas. Nearly three-quarters of creative activity is in industrial sectors (72%), which is far higher than any of the comparator areas (all less than 14%), North London boroughs (19%) and London (3%).

Figure 21: Type of Creative Activities within Tottenham & Comparator Areas



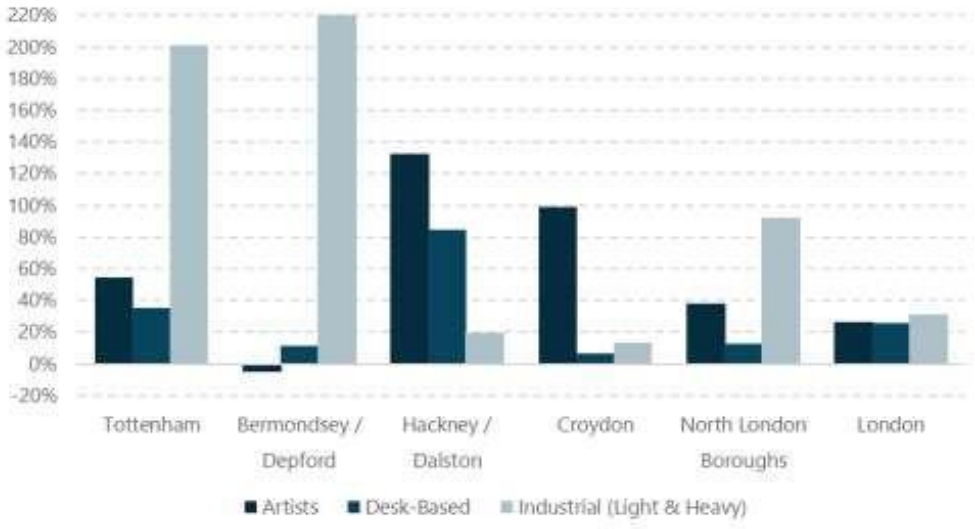
Source: BRES, 2015; Note: Using Tottenham's Creative Profile Definition

Growth across all creative activities, especially in industrial sub-sectors

There has been growth across all creative categories within Tottenham with notable growth seen in industrial activity. Tottenham's industrial creative activity has increased two-fold on the level seen in 2010 an increase only outperformed by the growth of industrial creative activity in Bermondsey (220%).

Tottenham has experienced the second highest level of employment growth in desk-based activities (+37%), only behind growth in Hackney / Dalston (+83%). Stronger growth in artist employment has been experienced in Hackney / Dalston (+133%) and Croydon (+99%) than in Tottenham (+54%).

Figure 21: Creative Employment within Tottenham & Comparator Areas - Percentage Change 2010-15

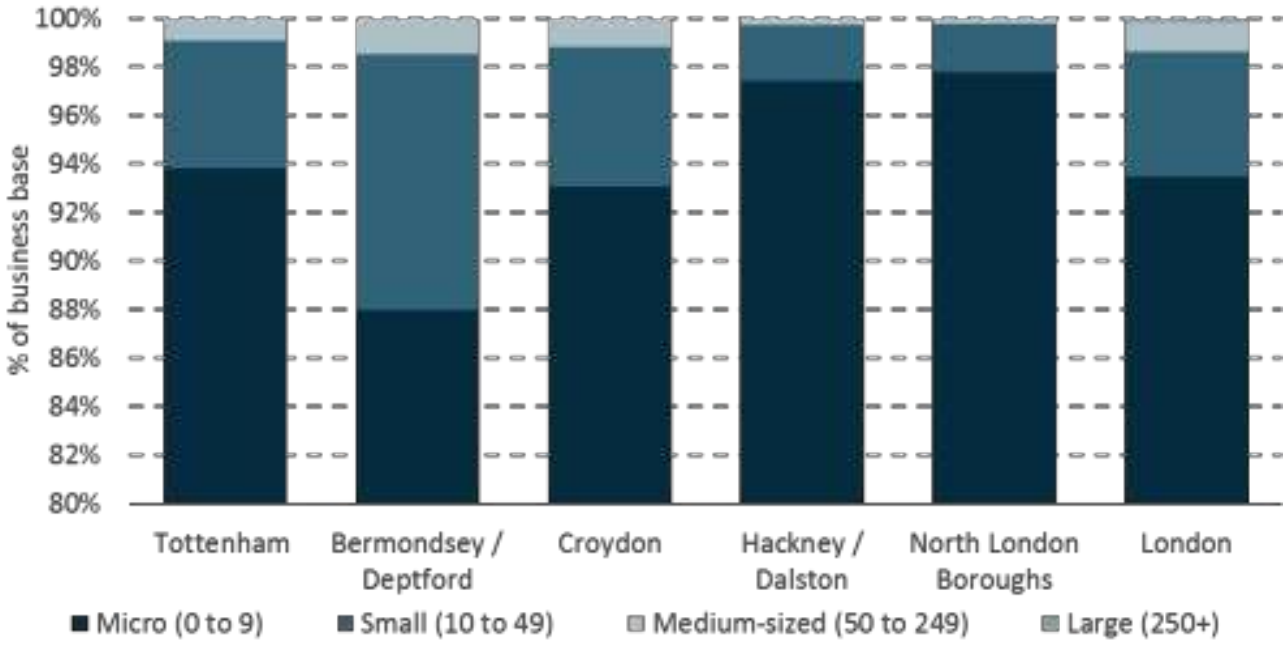


Large proportion of micro businesses in Tottenham's creative sector

The mix of business sizes in Tottenham's creative sector[8] is comparable to London, with 94% of creative businesses employing nine or less people, 5% employing 10 to 49 people and 1% employing more than 50 people. Croydon has the most similar mix of business sizes to Tottenham, whereas Bermondsey has a higher proportion of small businesses (11% employ 10 to 49 people), and Hackney has a higher proportion of micro businesses employing 0 to 9 people (97% of businesses).

[8] As defined by the Tottenham's Creative Profile definition

Figure 22: Size of Creative Businesses in Tottenham and Comparator Areas



Source: UK Business Count, ONS, 2015
Note: Using Tottenham's Creative Profile Definition; All areas have a minimum of 88% micro businesses.

Tottenham has strong relative specialism in fashion

Tottenham has less of a spread of creative sub-sector specialism. Fashion Manufacturing is one area which is very specialised, with Tottenham having 20 times the concentration of employment activity in the area respectively compared to London. Hackney/Dalston is the only area which has a similar concentration of employment to Tottenham in this regard.

Table 7: Sub-Sector Specialisations (Location Quotients) in Tottenham and Comparator Areas, 2015

Sub-Sector	Tottenham	Bermondsey / Deptford	Hackney / Dalston	Croydon	North London Boroughs
Advertising & Marketing	0.1	1.9	0.7	0.4	0.2
Architecture	0.1	0.6	1.7	0.2	0.4
Crafts	0.0	0.0	0.5	0.0	0.6

Design	0.9	0.0	3.5	0.1	0.6
Fashion Manufacturing	20.8	0.7	5.8	0.0	3.9
Film, TV, video, radio & photography	0.2	0.2	1.6	0.1	0.3
IT, software & computer services	0.3	0.8	0.5	0.7	0.6
Museums, galleries & libraries	0.4	0.7	0.8	0.0	0.6
Music, performing & visual arts	0.2	0.5	2.0	0.6	0.6
Publishing	0.2	0..2	0.2	0.7	0.2
Creative TOTAL	0.7	0.7	1.1	0.4	0.5

Source: BRES, ONS, 2015
Note: Using Tottenham's Creative Profile Definition; Numbers show the specialisation (location quotient) of the sub-sector in an area relative to London. A score above 1 shows that there is a higher specialisation of activity in the sub-sector in an area compared to across London – these are highlighted in blue.

Strong growth in Tottenham's specialisms relative to other areas

Analysis of the employment trends over the last five years, highlights the strong growth of Tottenham's creative sector. This has largely occurred in fashion manufacturing and film, TV, video, radio & photography sectors. Several sub-sectors in Tottenham have experienced higher employment growth than many of the comparator areas, North London boroughs and London as a whole.

Table 8: Sub-Sector Employment Growth in Tottenham and Comparator Areas, 2010-15

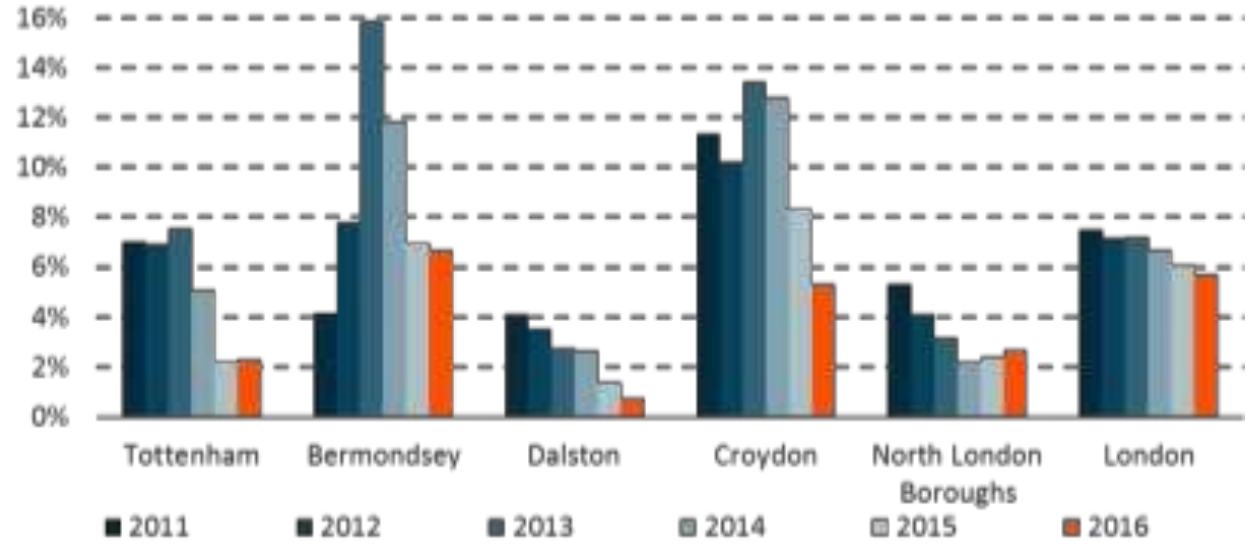
Sub-Sector	Tottenham	Bermondsey / Deptford	Hackney / Dalston	Croydon	North London	London
Advertising & Marketing	-17%*	+164%	+101%	+112%	-14%	+36%
Architecture	+57%*	-66%	+243%	+300%	+96%	+43%
Crafts	-100%*	N/A*	-67%*	N/A*	-64%	-17%
Design	+25%	-99%*	+158%	+45%*	+40%	+43%
Fashion Manufacturing	+201%	+149%	+18%	+67%	+111%	+82%
Film, TV, video, radio & photo	+73%	+75%	+135%	-13%	+25%	+21%
IT, software & computer services	+57%	+5%	+111%	+17%	+23%	+37%
Museums, galleries & libraries	-6%*	+4%	+3%	N/A	-38%	-8%
Music, performing & visual arts	+43%	-19%	+31%	+142%	+49%	+29%
Publishing	+31%	+3%	+122%	-34%	-13%	-2%
Creative TOTAL	+125%	+12%	+82%	+15%	+27%	+27%

Source: BRES, ONS, 2015
Note: * = small sample size (less than 20 employees); Cells highlighted blue have employment growth of greater than 50% over the last five years.

Pressure on industrial space is highest in Tottenham, with increasing pressure on office space

To understand the performance of the commercial property market in Tottenham and each of the comparator areas, CoStar data has been analysed to understand past and present performance. This has been broken down by office and industrial units, which are the most relevant to the core and supporting creative sector.

Figure 23: Office Vacancy Rate

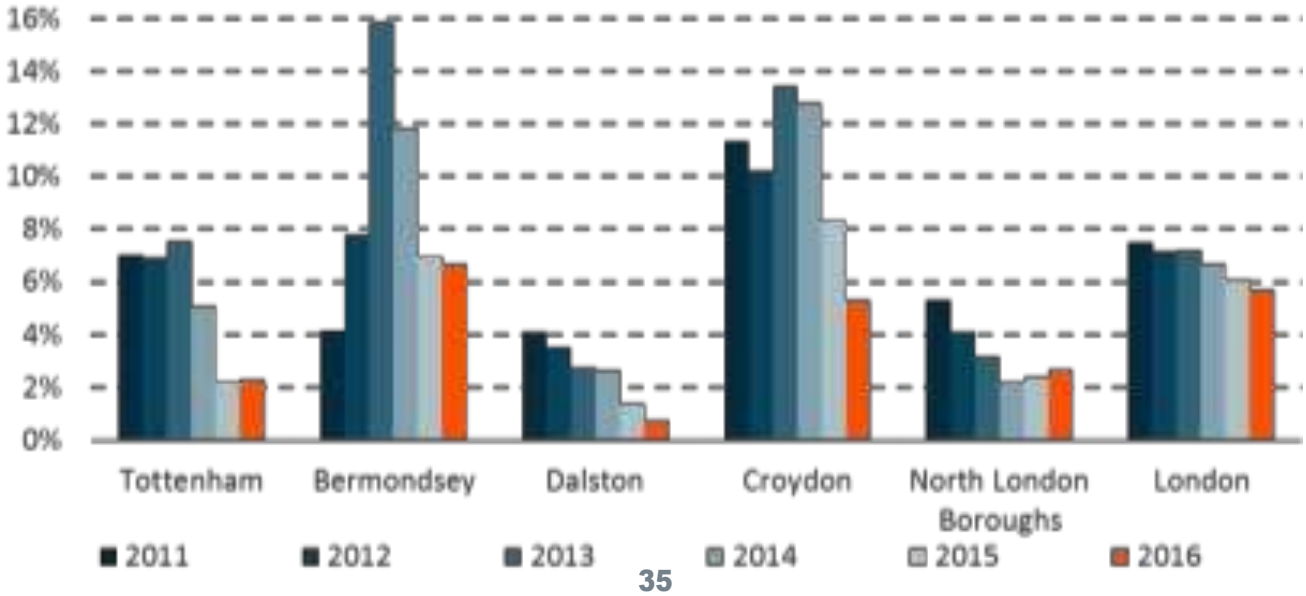


Like Tottenham, vacancy rates in Dalston and Croydon have declined over the last five years. Around 2% of office space in Tottenham is currently vacant. This is lower than all comparators areas apart from Hackney/Dalston.

Rental prices for office space in Tottenham is still comparatively low, with higher rates in all other comparator areas. This gives Tottenham a comparative advantage, although with low vacancy rates, it is expected that rental values may increase in the future (reflecting trends experienced elsewhere.

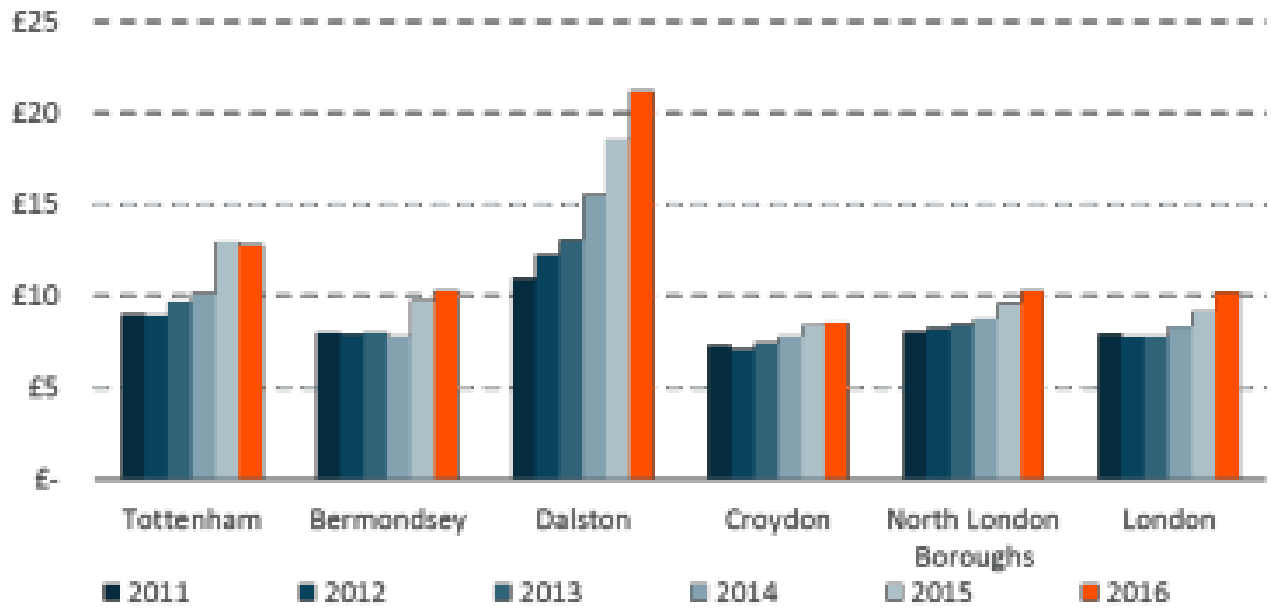
Tottenham currently has the lowest industrial vacancy rate out of all the comparator areas, with less than 1% of units vacant. All the areas have experienced declining industrial vacancy rates since 2012, with the greatest falls in Bermondsey /Deptford.

Figure 23: Office Vacancy Rate



Tottenham has the second highest industrial rent (only Dalston/Hackney is higher), with a typical unit in Tottenham costing £13 per sqft. Rental values have increased by 42% in Tottenham over the last five years, with only Dalston/Hackney experiencing a faster rate of increase (+92%).

Figure 24: Average Rent per Square Foot- Industrial



Tottenham has relatively low skills levels compared to comparator areas

Generally, skills performance in Tottenham is lower than in the comparator areas, with only 64% of the population qualified to NVQ Level 2+ (5+ A*-C grades at GCSE level or equivalent)[9]. This is eight to nine percentage points (pp) lower than in the other comparator areas and six pp lower than across the North London boroughs. More recent data for the borough shows there has been relatively little increase in qualification levels over the last five years in Haringey compared to the comparator areas (and their boroughs).

Table 9: Proportion of population qualified to NVQ Level 2 or above

	2011 Census	2015 APS* Borough-wide	2011-15 APS* % point
Tottenham	**64%**	**75%**	**+1%**
Bermondsey / Deptford	72%	79%	+5%
Croydon	73%	74%	+5%
Hackney / Dalston	72%	72%	+2%
North London Boroughs	70%	75%	+4%
London	72%	76%	+5%

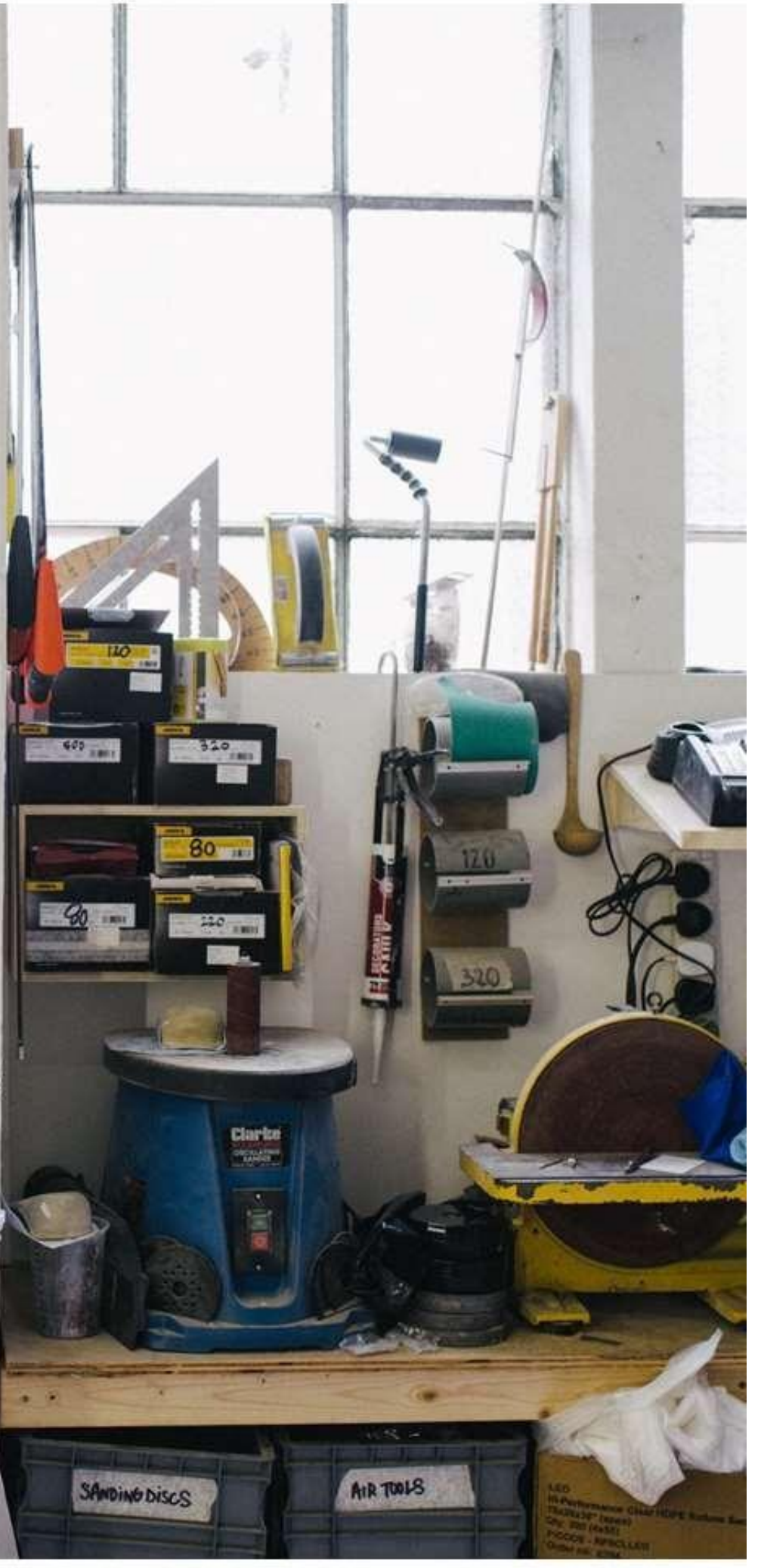
Source: ONS Census, 2011 & ONS Annual Population Survey (APS), 2016 Note: * APS qualifications data only available at borough-level

A person qualified to Level 2 or above will have at least 5 GCSEs grade A*-C. This typically the minimum requirement for many jobs.

STUDIO
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Chapter 4

Foundations of the Tottenham Creative Enterprise Zone



The evidence collected shows that Tottenham is home to an exciting and rapidly developing creative sector which is helping to establish new opportunities for residents and businesses. This development is helping to create a new identity within Tottenham and rejuvenate existing well-established industries, such as textiles manufacturing.

Tottenham has many key selling points and opportunities, which can further establish the creative sector's presence in Tottenham and provide the right conditions for its future development. There are also several gaps and barriers which are currently holding back the development of the sector which, if addressed could lead to further opportunities.

4.1 Tottenham's selling points and opportunities

Table 10: Tottenham's Key Selling Points & Opportunities

Key Selling Point	Description
Political and strategic momentum	-Strong leadership and strategic policy from LB Haringey and Mayor of London -Vision for Haringey is based on the principle that growth is essential for the future of the borough.
Evolution of supporting businesses and infrastructure	-Strength and diversity within Tottenham's supporting creative sector will help foster the development of core creative activities in the area. -Existing formal and informal support for businesses can be used to develop the sector further.
Local authority involvement in development	-LB Haringey provides influence and stewardship on local development -Opportunity to redevelop council-owned land in a way which provides new homes and jobs.
Known area and physical geography	-Tottenham is well defined area, administratively and physically, which help to build its profile. -Key strategic assets- including Tottenham Hotspur and the Bernie Grant Arts Centre, helps to position the area within London.
Large industrial stock	-The presence of large industrial estates within Tottenham (e.g. Millmead and Lockwood) in conjunction with several smaller estates with light industrial units provides the opportunity for production led creative activity.
Proximity and connectivity to markets and creative areas	-Good transport infrastructure (especially around Seven Sisters and Tottenham Hale) provides fast and frequent connections to Central London and other areas with a high level of creative activity (e.g. Blackhorse Lane, Soho and Hackney/Dalston).
Availability of general business support	-Several business support schemes are already available to Tottenham businesses including council-led initiatives (e.g. Haringey Opportunity Investment Fund), and other initiatives including the 639 Centre, the Bernie Grant Arts Centre.
National College for Digital Skills	-Presence of this specialist further education institution provides an opportunity for local young people to enter the creative industry, and for local businesses to engage.
Signs of growing clusters of activity	-Significant employment growth has occurred across several creative sub-sectors, with clusters of activity forming around a number of key locations (e.g. fashion manufacturing around Gourley Triangle).
Authenticity and distinctiveness	-The industrial nature of Tottenham's creative sector compared to other areas provides a unique business offer which makes Tottenham different from other creative areas.

4.2 Tottenham's Gaps and Barriers

Table 11 Tottenham's Gaps and Barriers Key Gap or Barrier Description

Gap/Barrier	Description
Current lack of creative companies apparent within statistics	-Using the traditional DCMS statistical definition, there are relatively few 'creative' companies identified. However, on-the-ground research shows there is a high level of creative activity taking place beyond that recognised in official statistics.
Size of the CEZ Pathfinder area	-The CEZ Pathfinder area encompasses a wide range of demographics, activities, sites, development opportunities and challenges. The scale of the area presents challenges when developing interventions which are universally applied, and in selecting which sites to target.
Skills and ability of existing residents to participate	-Local skill levels in Tottenham are relatively poor compared to Haringey and London-wide levels. -Local young people are not aware of the opportunities available within the local creative sector, despite their entrepreneurial ambitions.
Lack of specific creative business support	- Lack of business support and formalised networks available for creative businesses in Tottenham. Many businesses network informally, but many are unaware of the scale of creative activity taking place in Tottenham and opportunities for learning from each other and collaboration..
Image and reputational issues	-Tottenham's reputation from the 2011 riots and as a relatively deprived area has deterred some creative businesses from establishing in the area. -This reputation has been improving recently, although still impacts the view of the area compared to competitors.
Pace of change within the area	-The rapid development of the creative sector in Tottenham, in addition to London-wide pressure on industrial sites has let to rents increasing at a faster rate relative to other creative areas.
Reliance upon informal networks and goodwill	-Strong informal creative networks already exist within several parts of Tottenham. However, these are quite disparate and rely upon the goodwill of individuals who are committed to the sector. --These need to be brought together to achieve the best impact for the efforts that partners are currently making.
Threat of workspace conversion	-Permitted Development Rights are reducing the stock of industrial units available in Tottenham and are placing uncertainty on businesses in unprotected areas.
Current transport infrastructure in North Tottenham	-Areas to the North of Tottenham are currently poorly served by public transport, and this has restrained the level of creative activity taking place here. -This is likely to be improved in due course with three-tracking the Lee Valley lines (and in the long term, Crossrail 2).

4.3 Opportunities within Tottenham's Creative Clusters

The Creative Enterprise Zone should cover the same geography as the Tottenham Area Action Plan, concentrating on the four creative clusters identified. The table below summarises the opportunities in each creative cluster, subject to change as the Creative Enterprise Zone becomes more established.

Table 12 Opportunities with Creative Clusters

Creative Cluster	Specialisms	Assets & Opportunities
Millmead & Lockwood • Strategic Industrial Land • Established manufacturing businesses • Recent influx of creative businesses	• Sound/music recording • Post-production • Brewing	• Stock suitable for creative uses • History of small scale manufacturing • Strong clustering of sound/production activities • Suppliers within the production supply chain • Footfall & place-based branding
South Tottenham Employment Area • Designated employment area • Tottenham's largest creative cluster • Employing over 2,000 people	• Design & graphic • Set design & building • Music recording • Furniture manufacturing • Visual arts	• Managed workspace • Refurbished industrial buildings • Public-facing activities (cafe, galleries etc.) • National College for Digital Skills • Innovation in delivery of workspace (Bernard Works) • Land in public ownership • Night-time economy (emerging music activity) • Established creative networks
Gourley Triangle • Hyper clustering of fashion-design businesses by Seven Sisters	• Fashion design • Fashion manufacturing	• 'One-stop' destination for production • Place-based brand • Links to established cultural institutions • Informal skills training • Showcasing of production • Suppliers within the production supply chain • Land in public ownership
Tottenham Green • Dispersed creative activity around the High Road.	• Music & performance • Visual arts	• Clustering of cultural, civic & community institutions • Managed workspace provision • Cultural production and cultural consumption • Showcasing • Visitor economy

4.4 Actions

A range of objectives and actions have been identified through an assessment of the evidence and through consultation with businesses and delivery partners. These are summarised below and form the basis of Tottenham's CEZ Action Plan.

Objective 1 - Creating an Integrated and Cohesive Community

Building upon and strengthening existing creative networks, and facilitating engagement and cohesion with the local community

Successful clusters of economic activity grow around strong networks, where businesses are able to come together and share ideas, collaborate and challenge each other. Currently, there are a range of networks which bring together creative companies and organisations in Tottenham. These however, tend to be quite informal and are often focussed upon quite small areas, locations and workspaces. They are also fairly insular, and do not reach out into the wider Tottenham community.

Enhancing, linking and opening up these networks will be an important foundation for the Creative Enterprise Zone. Uniting partners behind the idea of a CEZ will be important to establishing the collectivism and involvement which will help enable sustainable growth in the area.

The recommendations which will help to make this happen are:

1) **Oversight and Facilitation –** Provide dedicated resource to act as a visible presence to link existing networks into a coherent whole. This should focus upon linking and scaling existing activity so that this can be as impactful as possible
2) **Brand –** Develop CEZ brand with internal and external programme of activity for promoting Tottenham as a creative area. This should balance enhancing local pride amongst existing businesses and community, with some external focus to attract new companies. Two underpinning elements of this brand have be identified:
   - Focus on existing strengths and gain acknowledgement of Tottenham's creative strength as an economic asset for London
   - Embed the idea of Tottenham's creativity within the identity of the area (as promoted by developers, agents, Tottenham businesses and the wider community) – placing creativity at the heart of the place making activities locally.
3) **Business Representation –** Establish a semi-independent CEZ Pathfinder Business Group to provide ideas and scrutiny over the evolving programme. This should, over time be given greater independence to influence CEZ activities, providing guidance to the CEZ board on the evolving needs of business.
4) **CEZ Ambassadors–** Recruit individuals (business and providers) who are prepared to act as public champions for the CEZ project; supporting creativity in the area.

Objective 2 – Developing Skills and Opportunities for the local Community

Ensuring that Tottenham's creative labour market is robust and local people are able to access opportunities in the sector.

The success of the CEZ Pathfinder will in large part, be a result of its ability to seed creativity into the identify of Tottenham and its communities. Engagement of existing and new Tottenham residents in the CEZ project is a vital component and will be an important marker of success and ensuring the programme achieves its potential.

A key element of this is enabling local people to harness employment opportunities which will emerge from a growing creative sector. A more appropriately skilled workforce will also help Tottenham become a more productive and competitive location for larger creative businesses to locate.

New institutions and provision are already moving in to the area, the challenge in the short term is to harness the unique attraction that the creative sector can have to engage as broad a cohort as possible.

Recommendations to help achieve this are:

1) **Creative Industries Careers Programme** - Provide education programme integrated within Tottenham's creative industries to foster local skills building and routes to local employment.
2) **CEZ Apprenticeship and Training Brokerage Programme** - Develop shared offer to enable access to a wider range of creative vocational experiences within the CEZ Pathfinder, a well as limiting risk to the businesses. This can be deployed at a specific location or, more likely, for a specific sectors – Sound Production and Furniture Manufacturers have identified issues with recruitment in consultation for this study
3) **Workspace and Amenity** – Reduce barriers for working parents by tethering workspace strong amenity (specifically childcare) to enable more local people to access creative networks
4) **Creative/Artist in Residence –** Identify and recruit a high profile, recognisable champion for the sector. This individual would be responsible working with schools and community groups to engage more local people in creative careers.
5) **Partner with Creative Higher Education Providers** – Arrange joint projects, knowledge exchange and education showcases with London's art, fashion and creative institutions.
6) **Community Creatives** – Use creativity as a tool for engagement and participation by recognising the value of creative activity within the community. Encourage local groups to sign up to be part of the CEZ network in exchange for support and space to help them grow.
7) **Digital Skills** – Ensure that the new ADA offer is supplemented to focus on certain creative sectors such as graphic design, interactive entertainment and marketing.
8) **Social Value Lease Clauses** – Encourage greater use of social value lease clauses as a means of involving local creative companies in the skills and community activities.

Objective 3 – Securing Spaces for Creative Activity

Supporting availability, affordability, suitability and certainty of space for creative businesses located and looking to locate in Tottenham.

Availability, affordability and certainty in relation to workspace have been consistently identified by businesses engaged in the development of this report as barrier to long term planning and growth. The main 'ask' for businesses, has been some certainty over their future in the area, which will enable them to invest and grow their business in Tottenham with confidence.

In some locations (Gourley Triangle and South Tottenham) providing certainty and safeguarding space is an immediate challenge. Here increasing costs and development pressures are already forcing businesses to consider their future in Tottenham.

The medium to long term workspace response needs to be a fundamental part of the Creative Enterprise Zone in Tottenham. Understanding existing assets and using them to counter these threats for creative companies will be critical.

Recommendations to support this are:

1) **Creative Workspace Officer**- Provide dedicated resource to support case making and communication to formally coordinate the business space offer as well as support referral of businesses within the area. This should involve known creative workspace providers, alongside involving existing agents and estate managers in the Creative Enterprise Zone Pathfinder project.

2) **Deployment of Council Assets –** Bring underutilised Council assets in the area into creative use in the short-medium term, and to provide long-term certainty and affordability within the local workspace offer.

3) '**Creative Land Trust' –** Linked to or independent of the Mayor of London's evolving proposals, develop a long-term mechanism to safeguard creative workspace in the area. This should seek to offer certainty of cost for occupiers, with flexibilities in rents to enable growth as well as provide a commercial return for reinvestment in subsidy or support of additional space.

4) **Loan Fund for Workspace –** Expand/refocus the existing Opportunity Investment Fund to provide a short-term loan programme to act as a bridge for organisations to support relocation or expansion from current premises or for workspace providers who are looking to improve or expand their provision

5) **Tethered Live Work** – Pilot a new generation of live work space at Bernard Works in South Tottenham. Based on pilot findings, support forthcoming residential development schemes to incorporate a live-work space element delivered through a tethered model. Future phases should focus on Tottenham High Road and North Tottenham to support greater spread of creative activity throughout the Tottenham CEZ.

6) **Planning –** Employment Space Guidance – To ensure that Masterplan's and forthcoming developments meet the needs of the CEZ Pathfinder, develop employment space guidance to support the provision of B class use employment space across the CEZ Pathfinder area, focussing on the delivery of business space within mixed us development.

Objective 4 - Strengthening Emerging Growth Sectors

Further strengthening Tottenham's specialisms (fashion, IT and small-scale manufacturing), by supporting businesses to scale and grow.

It is the presence of creative companies occupying industrial spaces, creating content and products, which sets Tottenham apart from other locations in London. Ensuring that the area can support scaling and growth for these businesses will be an important element in growing employment and maintaining a strong narrative for the Creative Enterprise Zone Pathfinder.

Existing networks and organisations already provide some excellent, highly local support for creative business in Tottenham. Workspace providers and informal sector champions are already supporting their peers and helping the business community to evolve and grow. Current support however, tends to be delivered through closed networks which are dependent upon where a company is located or if they have access to relevant knowledge or information. Scaling existing support, so that it can be accessed by a larger number of businesses will be important not only improving the skills within the local business community, as well as providing strengthening the ecosystems which have emerged in recent years.

These smaller scale maker and manufacturing companies have reported uncertainty about their ability to stay and grow locally. They also note difficulties in securing capital for growth, issues with recruitment and some issues with getting goods to market. Targeting support to develop a critical mass of making activity, will help Tottenham, to become recognised as London's fulcrum for this activity.

Specific sectors which are present locally and could benefit from this intervention specifically include Fashion and Furniture Making.

Recommendations to support business growth are:

1) **CEZ Pathfinder Maker Advisory Service** – Targeted technical and strategic support for local manufacturing companies to help them scale their operations and adopt more innovative practices.
2) **Made in Tottenham -** Provide Local support to showcase and prototype – Provide enhanced showcasing and routes to market for goods produced in Tottenham. This could include local retail showcasing as well as more practical links to buyers and trade show delegations.
3) **Mobile/ Hub Businesses Support –** There are a range of drivers of uncertainty identified by the existing business community, but currently no central point where they can access support to respond these. The provision of convenient, flexible and consistent mobile support at hubs across the area would respond to this as well as taking pressure of existing providers as well as providing a higher quality of service. This should be configured to meet the specific development needs of individual companies as well as supporting consistency of provision in workspace and peer to peer networks.

Appendix A - Creative Definition

During our research, we have redefined our definition of the creative sector in Tottenham to ensure it more accurately reflects the current creative activities taking place in the area. This section explains more detail on these revised definitions and the reasoning behind the modifications.

Revised Statistical Definition:

During our initial desk-based research, we anticipated using the DCMS definition, which is widely regarded the best-fit definition for statistically measuring the creative sector. Some of the key sub-sectors within this definition include:

- Advertising & Marketing
- Architecture
- Crafts
- Design
- Film, TV, video, radio & photography
- IT, software & computer services
- Museums, galleries & libraries
- Music, performing & visual arts
- Publishing

Fashion Manufacturing has been added to the DCMS definition shown above, creating a new definition of the creative sector, named 'Tottenham's Creative Profile'. This better reflects the level of creative activity taking place in Tottenham.

The initial statistical analysis found that there was a limited amount of creative activity within Tottenham. However, the on-the-ground research found that there was a strong presence of creative activity in Tottenham, which was not reflected as part of the statistical analysis. To better reflect the size of the creative sector in Tottenham, we have included a further creative sub-sector whose activities are largely creative in their nature.

Should the business be considered as part of the 'core creative' industries?

To help partners decide whether these businesses are indeed 'Creative' the following set of criteria are provided to help partners determine if companies within the broad 'supporting' sector are part of the creative industries ecosystem. This has been informed by various existing methodologies to map creative industries and intelligence on creative sector ecosystems in London, but is tailored to the Tottenham experience.

Creative workforce:
Does the business employ a significant proportion of 'creative workers' or does the business significantly rely on the intellectual property and/or output produced by its 'creative workforce'?

Production process:
Is the business providing a production process that is potentially complementary to 'core creative' activities within a related field?

Wholesale distribution channels:
Is the business providing wholesale distribution channels to 'core creative' businesses?

Retail channels:
Is the business providing retail distribution channels to 'core creative' businesses?

Promotion/showcasing:
Is the business promoting/showcasing or providing the opportunity to promote/showcase to 'core creative businesses'?

Public-facing/identity of place:
Is there a public-facing side to the business that contributes to the identity of its specific location or the wider-Tottenham area?
Does this public-facing/identity of place function draw visitors to the area/contribute to the 'appeal' of the area?

Services:
Is the business offering a service upon which 'core creative' industries might rely on for the successful operation of their business?

Statistical Definition

SIC and Name	Tottenham's Creative Profile	Supporting Creative	Grouping
10110		Supporting Creative	Heavy Industrial
10120		Supporting Creative	Heavy Industrial
10130		Supporting Creative	Heavy Industrial
10200		Supporting Creative	Heavy Industrial
10310		Supporting Creative	Heavy Industrial
10320		Supporting Creative	Heavy Industrial
10390		Supporting Creative	Heavy Industrial
10410		Supporting Creative	Heavy Industrial
10420		Supporting Creative	Heavy Industrial
10511		Supporting Creative	Heavy Industrial
10512		Supporting Creative	Heavy Industrial
10519		Supporting Creative	Heavy Industrial
10520		Supporting Creative	Heavy Industrial
10611		Supporting Creative	Heavy Industrial
10612		Supporting Creative	Heavy Industrial
10620		Supporting Creative	Heavy Industrial
10710		Supporting Creative	Heavy Industrial
10720		Supporting Creative	Heavy Industrial
10730		Supporting Creative	Heavy Industrial
10810		Supporting Creative	Heavy Industrial
10821		Supporting Creative	Heavy Industrial
10822		Supporting Creative	Heavy Industrial
10831		Supporting Creative	Heavy Industrial
10832		Supporting Creative	Heavy Industrial
10840		Supporting Creative	Heavy Industrial
10850		Supporting Creative	Heavy Industrial
10860		Supporting Creative	Heavy Industrial
10890		Supporting Creative	Heavy Industrial
10910		Supporting Creative	Heavy Industrial
10920		Supporting Creative	Heavy Industrial
11010		Supporting Creative	Heavy Industrial
11020		Supporting Creative	Heavy Industrial
11030		Supporting Creative	Heavy Industrial
11040		Supporting Creative	Heavy Industrial
11050	Tottenham's Creative Profile		Heavy Industrial
11060		Supporting Creative	Heavy Industrial
11070		Supporting Creative	Heavy Industrial
14110	Tottenham's Creative Profile		Light Industrial
14120	Tottenham's Creative Profile		Light Industrial
14131	Tottenham's Creative Profile		Light Industrial

14132	Tottenham's Creative Profile		Light Industrial
14141	Tottenham's Creative Profile		Light Industrial
14142	Tottenham's Creative Profile		Light Industrial
14190	Tottenham's Creative Profile		Light Industrial
14200	Tottenham's Creative Profile		Light Industrial
14310	Tottenham's Creative Profile		Light Industrial
14390	Tottenham's Creative Profile		Light Industrial
15120	Tottenham's Creative Profile		Light Industrial
15200	Tottenham's Creative Profile		Light Industrial
18110		Supporting Creative	Heavy Industrial
18121		Supporting Creative	Heavy Industrial
18129		Supporting Creative	Heavy Industrial
18130		Supporting Creative	Heavy Industrial
18201		Supporting Creative	Desk-Based
18202		Supporting Creative	Desk-Based
18203		Supporting Creative	Desk-Based
26110		Supporting Creative	Heavy Industrial
26120		Supporting Creative	Heavy Industrial
26200		Supporting Creative	Heavy Industrial
26301		Supporting Creative	Heavy Industrial
26309		Supporting Creative	Heavy Industrial
26400		Supporting Creative	Heavy Industrial
26520		Supporting Creative	Light Industrial
26800		Supporting Creative	Heavy Industrial
31010		Supporting Creative	Heavy Industrial
31020		Supporting Creative	Heavy Industrial
31030		Supporting Creative	Heavy Industrial
31090		Supporting Creative	Heavy Industrial
32120	Tottenham's Creative Profile		Light Industrial
32130		Supporting Creative	Light Industrial
32200		Supporting Creative	Light Industrial
32401		Supporting Creative	Light Industrial
32409		Supporting Creative	Light Industrial
46150		Supporting Creative	Desk-Based
46160		Supporting Creative	Desk-Based
46220		Supporting Creative	Heavy Industrial
46410		Supporting Creative	Heavy Industrial
46420		Supporting Creative	Heavy Industrial
46431		Supporting Creative	Heavy Industrial
46439		Supporting Creative	Heavy Industrial
46440		Supporting Creative	Heavy Industrial
46450		Supporting Creative	Heavy Industrial
46470		Supporting Creative	Heavy Industrial
46480		Supporting Creative	Heavy Industrial

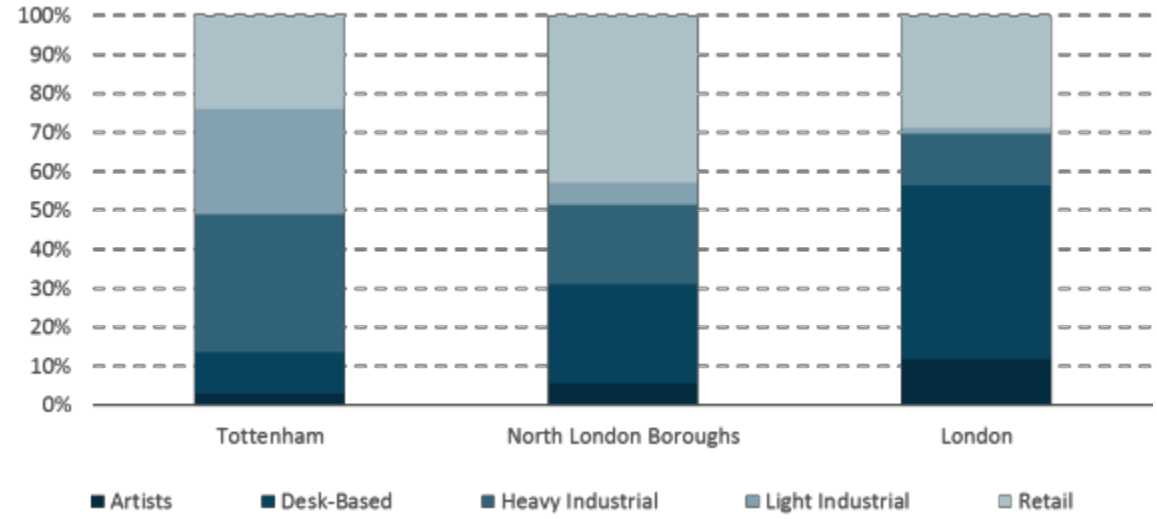
46491		Supporting Creative	Heavy Industrial
46510		Supporting Creative	Heavy Industrial
46520		Supporting Creative	Heavy Industrial
46640		Supporting Creative	Heavy Industrial
46650		Supporting Creative	Heavy Industrial
47410		Supporting Creative	Retail
47430		Supporting Creative	Retail
47510		Supporting Creative	Retail
47520		Supporting Creative	Retail
47530		Supporting Creative	Retail
47591		Supporting Creative	Retail
47599		Supporting Creative	Retail
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47710		Supporting Creative	Retail
47721		Supporting Creative	Retail
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47760		Supporting Creative	Retail
47770		Supporting Creative	Retail
47781		Supporting Creative	Retail
47791		Supporting Creative	Retail
47799		Supporting Creative	Retail
47810		Supporting Creative	Retail
47820		Supporting Creative	Retail
47890		Supporting Creative	Retail
56102		Supporting Creative	Retail
56103		Supporting Creative	Retail
56301		Supporting Creative	Retail
56302		Supporting Creative	Retail
58110	Tottenham’s Creative Profile		Desk-Based
58120	Tottenham’s Creative Profile		Desk-Based
58130	Tottenham’s Creative Profile		Desk-Based
58141	Tottenham’s Creative Profile		Desk-Based
58142	Tottenham’s Creative Profile		Desk-Based
58190	Tottenham’s Creative Profile		Desk-Based
58210	Tottenham’s Creative Profile		Desk-Based
58290	Tottenham’s Creative Profile		Desk-Based
59111	Tottenham’s Creative Profile		Artists
59112	Tottenham’s Creative Profile		Artists
59113	Tottenham’s Creative Profile		Artists
59120	Tottenham’s Creative Profile		Artists
59131	Tottenham’s Creative Profile		Desk-Based
59132	Tottenham’s Creative Profile		Desk-Based
59133	Tottenham’s Creative Profile		Desk-Based
59140	Tottenham’s Creative Profile		Desk-Based

59200	Tottenham's Creative Profile		Artists
60100	Tottenham's Creative Profile		Artists
60200	Tottenham's Creative Profile		Artists
61100		Supporting Creative	Heavy Industrial
61200		Supporting Creative	Heavy Industrial
61300		Supporting Creative	Heavy Industrial
61900		Supporting Creative	Heavy Industrial
62011	Tottenham's Creative Profile		Desk-Based
62012	Tottenham's Creative Profile		Desk-Based
62020	Tottenham's Creative Profile		Desk-Based
62030		Supporting Creative	Desk-Based
62090		Supporting Creative	Desk-Based
63110		Supporting Creative	Desk-Based
63120		Supporting Creative	Desk-Based
63910		Supporting Creative	Desk-Based
63990		Supporting Creative	Desk-Based
70210	Tottenham's Creative Profile		Desk-Based
71111	Tottenham's Creative Profile		Desk-Based
71112	Tottenham's Creative Profile		Desk-Based
73110	Tottenham's Creative Profile		Desk-Based
73120	Tottenham's Creative Profile		Desk-Based
73200		Supporting Creative	Desk-Based
74100	Tottenham's Creative Profile		Desk-Based
74201	Tottenham's Creative Profile		Artists
74202	Tottenham's Creative Profile		Artists
74203	Tottenham's Creative Profile		Light Industrial
74209	Tottenham's Creative Profile		Artists
74300	Tottenham's Creative Profile		Desk-Based
77220		Supporting Creative	Retail
77291		Supporting Creative	Retail
78101		Supporting Creative	Artists
85520	Tottenham's Creative Profile		Desk-Based
90010	Tottenham's Creative Profile		Artists
90020	Tottenham's Creative Profile		Artists
90030	Tottenham's Creative Profile		Artists
90040	Tottenham's Creative Profile		Desk-Based
91011	Tottenham's Creative Profile		Desk-Based
91012	Tottenham's Creative Profile		Desk-Based
91020	Tottenham's Creative Profile		Desk-Based
95110		Supporting Creative	Desk-Based
95120		Supporting Creative	Desk-Based
95230		Supporting Creative	Light Industrial
95240		Supporting Creative	Light Industrial
95250		Supporting Creative	Light Industrial

Appendix B - Supporting Evidence

The presence of many industrial estates along the Upper Lee Valley has influenced the type of creative activities taking place in Tottenham. Around 60% of Tottenham's creative sector engages in industrial activities, with 27% light industrial and 35% heavy industrial. This is a much higher proportion than across the North London boroughs (26%) and London (14%). A quarter of the remaining creative activity is made up of retail based employment, with desk based work (11%) and artists (3%) providing the smallest proportion of creative activity in the area.

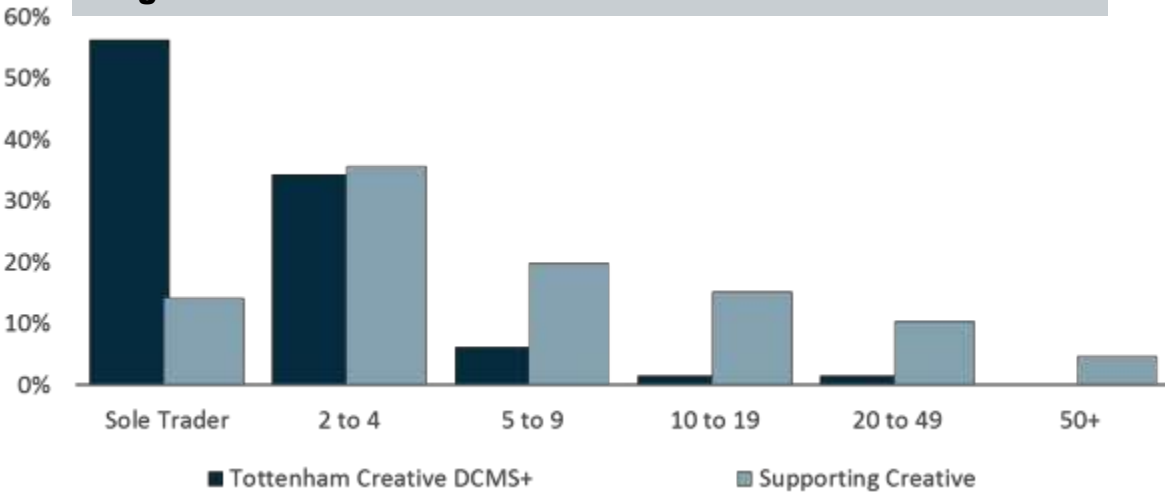
Figure 1.40 Types of Creative Activity, 2015



Source: BRES, 2015

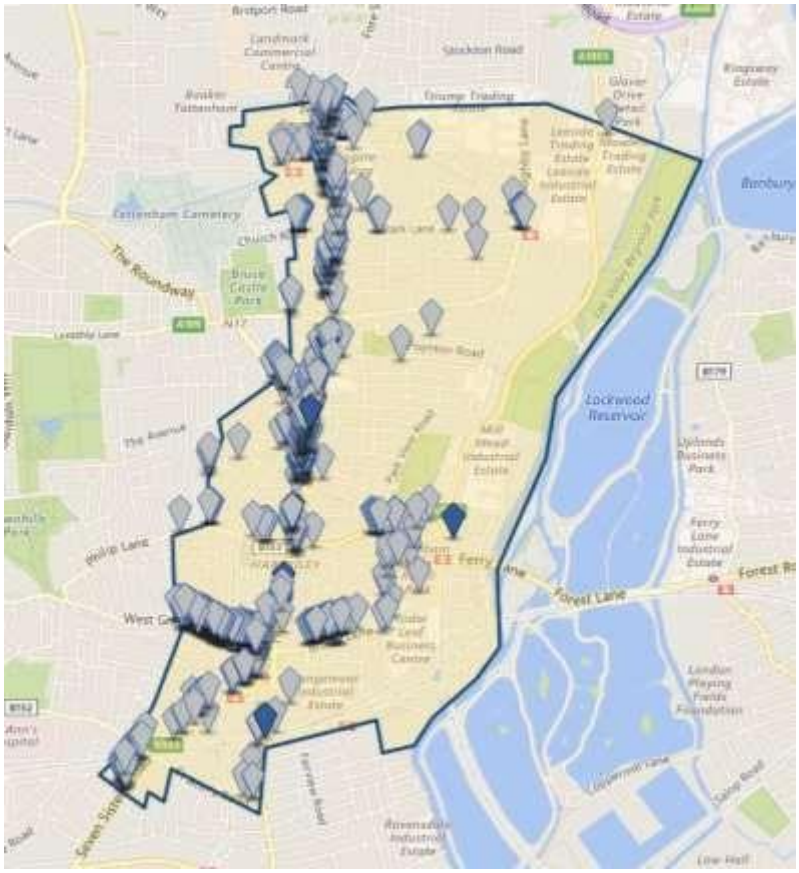
Businesses within Tottenham's creative sector are relatively small, especially those businesses in the core creative sector. Of businesses within the core creative sector, 91% employ fewer than four people, and none employ more than 50. By comparison, businesses in the supporting creative sector are generally larger, with 30% of businesses employing more than 10 people.

Figure 1.41 Size of Businesses in Tottenham's Creative Sector



The maps below show the distribution of commercial units across Tottenham using data provided by CoStar commercial property intelligence.

Figure C.1 Distribution of Retail Units



Source: CoStar, 2017

Note: Each dark blue diamond represents a unit currently for let / sale. Grey diamonds represent occupied properties.

A concentration of retail units can be seen to the west of the borough, with a particular concentration apparent along Tottenham High Road and adjacent areas. There is also a notable clustering of retail units around White Hart Lane Stadium and the Tottenham Hale Retail Park.

There is an under representation of retail activity to the north east of the borough, where there is a larger presence of residential and industrial land uses.

Figure C.2 Distribution of Industrial Units



Source: CoStar, 2017
Note: Each dark blue diamond represents a unit currently for let / sale. Grey diamonds represent occupied properties.

There is a strong concentration of industrial units to the north of Tottenham, centred around the Leeside Trading & Industrial Estate, Mowlem Industrial Estate and Triump Trading Estate.
There is also a clustering to the east of the area, with industrial units coalescing around the Mill Head Industrial Estate, Tudor Leaf Business Centre and Rangemoor Industrial Estate.

Figure C.3 Distribution of Office Units



Source: CoStar, 2017
Note: Each dark blue diamond represents a unit currently for let / sale. Grey diamonds represent occupied properties.

Office units in Tottenham broadly follow the spatial pattern of retail units, with a corridor of office units concentrated along Tottenham High Roa