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Socio-Economic
Assessment

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Acronyms

APS	Annual Population Survey
ASHE	Annual Survey of Hours and Earnings
BRES	Business Register and Employment Survey
CAGR	Compound Annual Growth Rate
CAZ	Central Activity Zone
CCG	Clinical Commissioning Group
BIS	Department for Business Innovation and Skills
DCLG	Department of Communities and Local Government
DfT	Department for Transport
ELR	Employment Land Review
FEMA	Functional Economic Market Area
GLA	Greater London Authority
GVA	Gross Value Added
IMD	Indices of Multiple Deprivation
LLG	Local London Group
LQ	Location Quotient
LSOA	Lower Layer Super Output Areas
NVQ	National Vocational Qualifications
ONS	Office of National Statistics
SIC	Standard Industrial Classification of Economic Activities
SOC	Standard Occupational Classification
TTWA	Travel to Work Area

1. Introduction

1.1 Study Context

1.1.1 AECOM was commissioned by the London Borough (LB) of Enfield to undertake a Socio-Economic Assessment (SEA) of the Borough.

1.1.2 The Socio-Economic Assessment will inform the development of the Local Plan for Enfield and help to shape planning policies and strategies for growth.

1.2 Objectives

1.2.1 The overarching objective of the Socio-Economic Assessment is to construct a single evidence base that will provide a profile of Enfield's economy.

1.2.2 Specific elements of this will be to:

- Develop a baseline of Enfield's economy
- Provide an understanding of how economic conditions, forces and factors shape places at a range of spatial levels; and inform policy, priorities, and resource allocation
- Take into account Enfield's wider, strategic context including its connections with neighbouring Local Authorities and the rest of London
- Reflect the economic character of Enfield within the national and sub-regional context, including a definition of its Functional Economic Market Area (FEMA); and
- Enable challenge, testing and development of policy, vision and aims.

1.2.3 The SEA aims to identify trends in key economic indicators, observe links between indicators, and highlight issues and challenges related to the performance of the economy. It aims to suggest explanations of local economic outcomes limited to the data findings, or allude to potential sources or implications of these findings. The report is not an economic strategy however and therefore does not go further to suggest policies or actions to improve economic conditions.

1.2.4 The Socio-Economic Assessment covers the following sections into which the report is split:

- Demography
- Employment and local resilience
- Enterprise
- Economic geography
- Skills
- Productivity
- Economic inclusion

- Linkages and flows
- Environment; and
- Housing and planning.

1.2.5 The definition and content of these thematic headings are clarified at the start of each section.

1.3 Approach

1.3.1 The approach to capturing and analysing data for the socio-economic assessment is set out under the sub sections below.

1.3.2 The output of the assessment of data focusses on presenting analysis which provides insight into the main characteristics of the Enfield economy in relation to comparator areas, and dynamically over time where possible.

1.3.3 The analysis is focussed on explaining rather than describing data and trends in order to provide useful insight into drivers of change and to portray a cohesive picture of how each of the sections contributes to a holistic view of the economy of Enfield.

Data Sources

1.3.4 The report draws upon the latest data available from the following sources:

- Office for National Statistics (ONS)
 - Census (2001 and 2011)
 - Business Register and Employment Survey (BRES)
 - Annual Population Survey (APS)
 - Annual Business Inquiry (ABI)
 - Regional Gross Value Added (GVA)
 - Population estimates
- Department for Communities and Local Government (DCLG)
 - Housebuilding started and completed, by tenure and district
 - Average house prices (Land Registry data)
- Department of Energy and Climate Change
- Public Health England, health profiles
- Asthma UK data portal
- Department for Transport (DfT), specifically data on motor vehicle traffic
- Greater London Authority (GLA), population projections; and
- Evidence base information from LB Enfield's Local Plan and Local plans of other comparator areas (LBs/LAs).

1.3.5 Where data is available, analysis has been undertaken across a time period to

illustrate change. Typically the two data points of the time series aim to capture a full economic cycle so that data values representing lower and higher points in the economy are represented. The last economic downturn began first quarter 2008 and analysis post 2008 therefore captures periods of economic contraction, stabilisation and growth.

- 1.3.6 'Brexit' - the vote by the UK public to leave the European Union – is not reflected in the data presented, but it is worth considering briefly how it could impact on economic growth. In the short term, with political and financial uncertainty and the knock-on effect this has on business confidence and investor demand, markets will move towards a new equilibrium. This has already translated as a fall in sterling. A fall in sterling has made the UK a more competitive place to manufacture but ahead of new trade deals being negotiated companies will be cautious of investing or expanding. The time taken to negotiate new forms of access to EU will impact on export industries, which in London includes services such as finance, law and media, which have underpinned much of the London's economic growth. In the absence of any view of what new trading relations with the EU may look like, it is difficult to project what the long term economic impact could be. However, impacts are expected on population (through changing patterns of migration), labour supply, the exchange of goods and services, and investment.

Comparative Analysis

- 1.3.7 To enable comparison and benchmarking, the analysis of Enfield's economy is made, where relevant / applicable in relation to the following area comparators:
- **Functional Economic Market Area:** The FEMA is identified as the London Boroughs of Barnet, Enfield, Haringey, Waltham Forest, Redbridge; and Local Authorities of Broxbourne, Welwyn Hatfield, Hertsmere and Epping Forest. Inner London, as a major commuting destination is also a strong economic influence on Enfield, and this is accounted for and discussed where relevant.
 - **Local London Group (LLG):** Enfield, Waltham Forest, Redbridge, Barking & Dagenham, Newham, Havering, Greenwich, and Bexley; and
 - **Outer London,** as per the London Plan (Consolidated since 2011, 2016) comprising: Barking and Dagenham, Barnet, Bexley, Brent, Bromley, Croydon, Ealing, Enfield, Haringey, Harrow, Havering, Hillingdon, Hounslow, Kingston upon Thames, Merton, Redbridge, Richmond upon Thames, Sutton; and Waltham Forest. These are useful comparator areas as they are part of the same economic 'orbit' of Inner London.
 - Other locations which have some parallels with Enfield's economic offer in terms of commercial property markets and travel to work catchments, including Harlow and Stevenage. These locations can be considered as competing economic centres to Enfield in the sub-region.
- 1.3.8 Geographical comparators are applied where relevant against LB Enfield data. Depending on the type of analysis, Enfield will be either compared against an averaged grouping, or against individual Boroughs / Local Authorities.
- 1.3.9 More widely, Enfield is located within the London Stansted Cambridge Corridor

(LSCC) which is well represented politically and has signification aspirations to achieve growth in life sciences and higher value-added industries. Where relevant, analysis draws out and highlights the opportunities which exist with the LSCC.

Sectoral Analysis

1.3.10 The assessment includes sectoral analysis that profiles Enfield's key business and employment sectors. The sectors of interest are:

- Manufacturing
- Wholesale and transport, distribution and communication
- Construction
- Glasshouse industry
- Retail
- Finance and business support services
- Education
- Health and social care
- The visitor economy; and
- The evening economy.

1.3.11 These sectors reflect the majority of employment within Enfield. Their growth and decline since 2009 reveals the key economic trends within the Borough. Analysis also focusses on sub-sectors within these broader categories. This information can be used to help the Borough identify which of its targeted, priority industries – including high-tech manufacturing and engineering, digital and creative industries, and low carbon / clean energy - could be well placed to grow in Enfield.

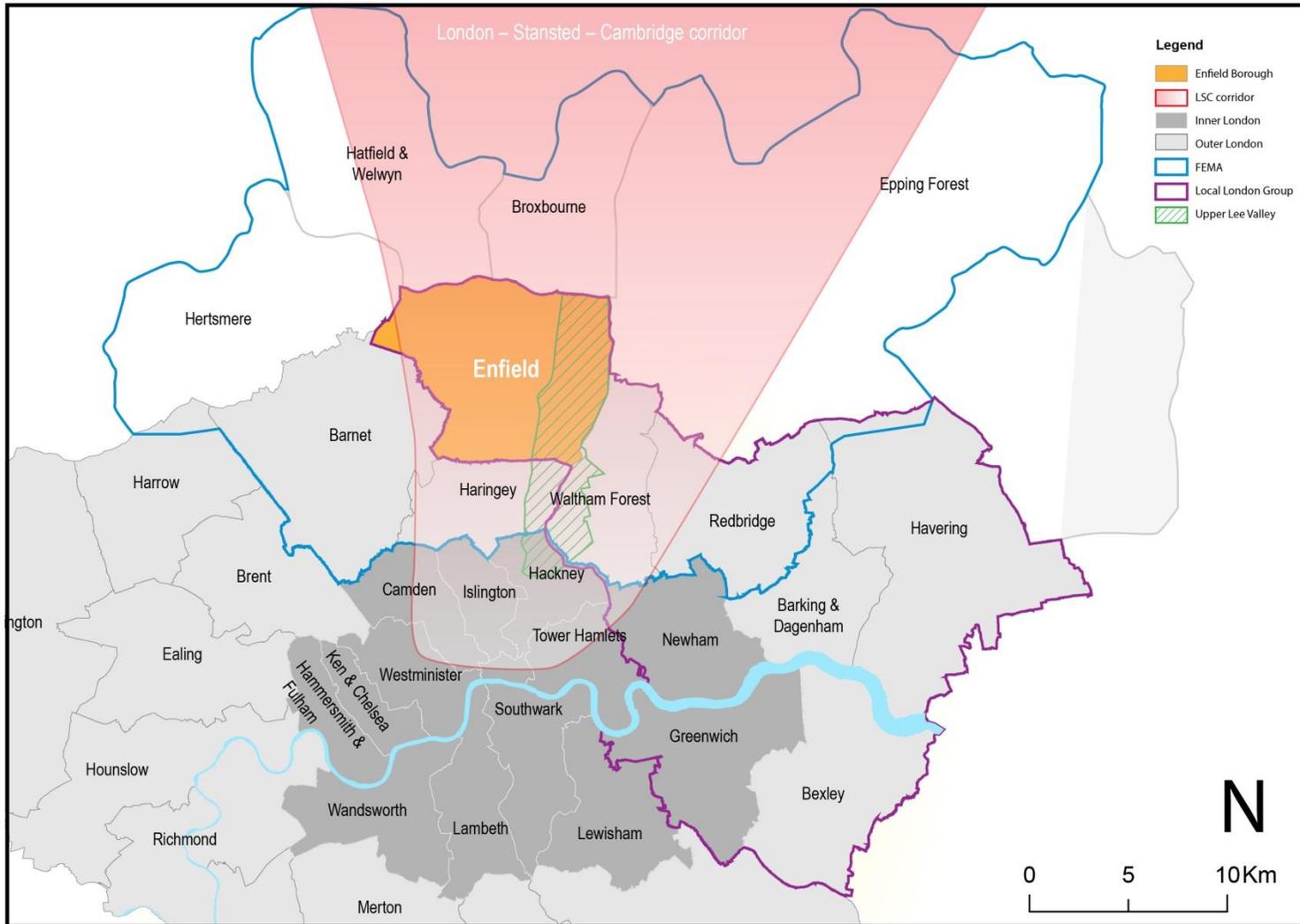
1.3.12 These sectors have been defined using 2007 Standard Industrial Codes (SIC). The list of these codes is held in Appendix A. These sectors do not comprise the whole economy – there are others in Enfield, though comparatively small in size. Other sector groupings are considered in the assessment such as the public sector, which may comprises a number of sub-sectors listed above (e.g. health and education).

1.4 Report Structure

1.4.1 Following the introduction in Section 1, the report is broken down as follows:

- Section 2, presents an economic analysis of each thematic heading listed under paragraph 1.2.4
- At the end of each theme there a brief summary of the key findings; and
- Section 3 provides a conclusion of Enfield's economy drawing together the key findings from the economic assessment.

Figure 1-1: Enfield and comparator areas



2. Economic Assessment

2.1 Demography

Introduction

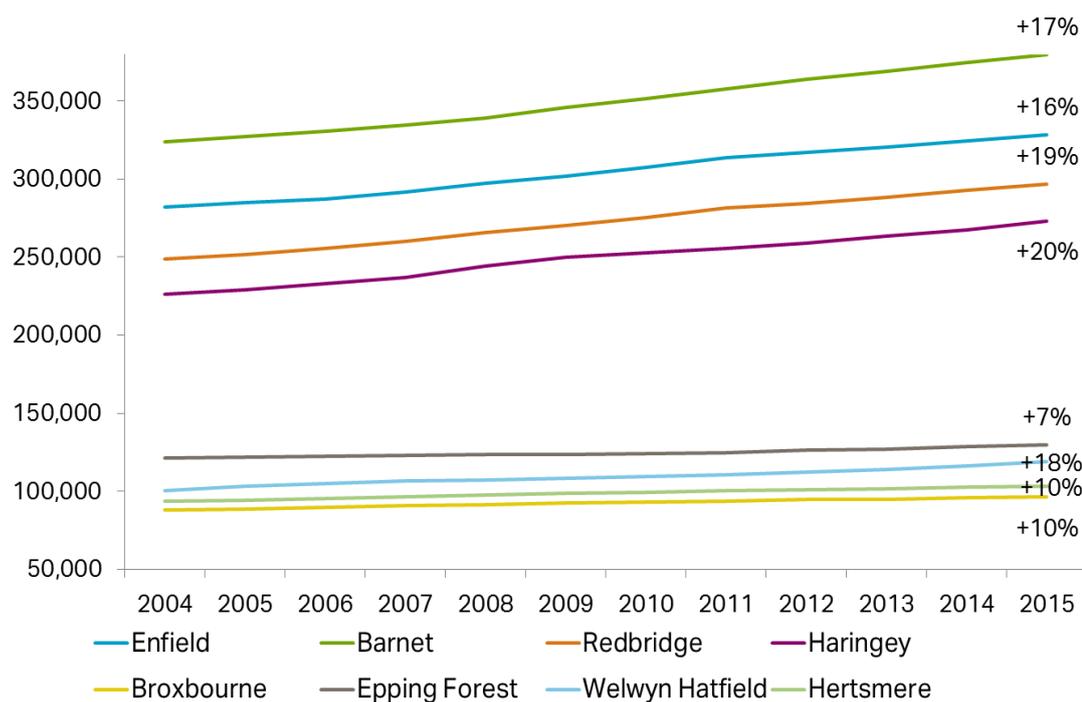
2.1.1 Population structure is a key driver of demand for local goods and services, and determinant of labour market depth and breadth, both of which underpin the economic strength and economic potential of an area.

2.1.2 This section presents analysis on:

- Historical population growth trends, including analysis by age group; and
- Population growth projections.

Analysis

Figure 2-1: Population growth in Enfield and comparator boroughs (total population and percentage change in population)



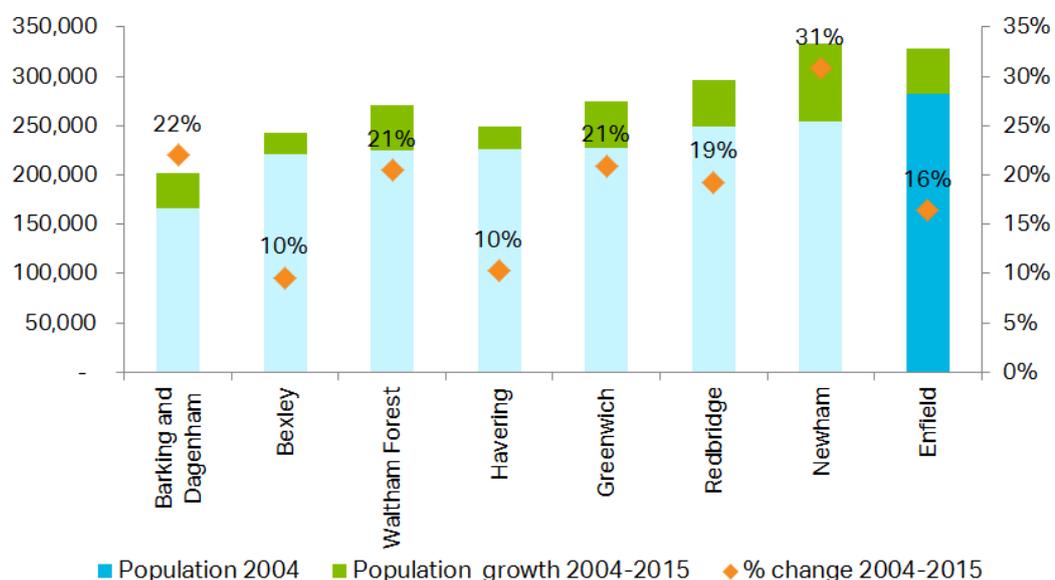
Source: Census Mid-Year Population Estimates 2016

2.1.3 **A population that has grown to over 328,000.** Figure 2-1 shows that Enfield's population grew by 46,200 between 2004¹ and 2015, from 282,200 to 328,400 residents, representing total growth over the period of 16.4%. This growth is largely in line with comparator boroughs in Outer London, but greater than growth rates experienced by Local Authority areas in the wider South East, outside

¹ 2004 is used as the starting date as it aligns with Borough level data for other key measurements, such as employment. This allows for comparisons to be made between measures, for example, population and employment as presented in figure 2-8.

London (e.g. Broxbourne, Epping Forest, Welwyn Hatfield and Hertsmere).

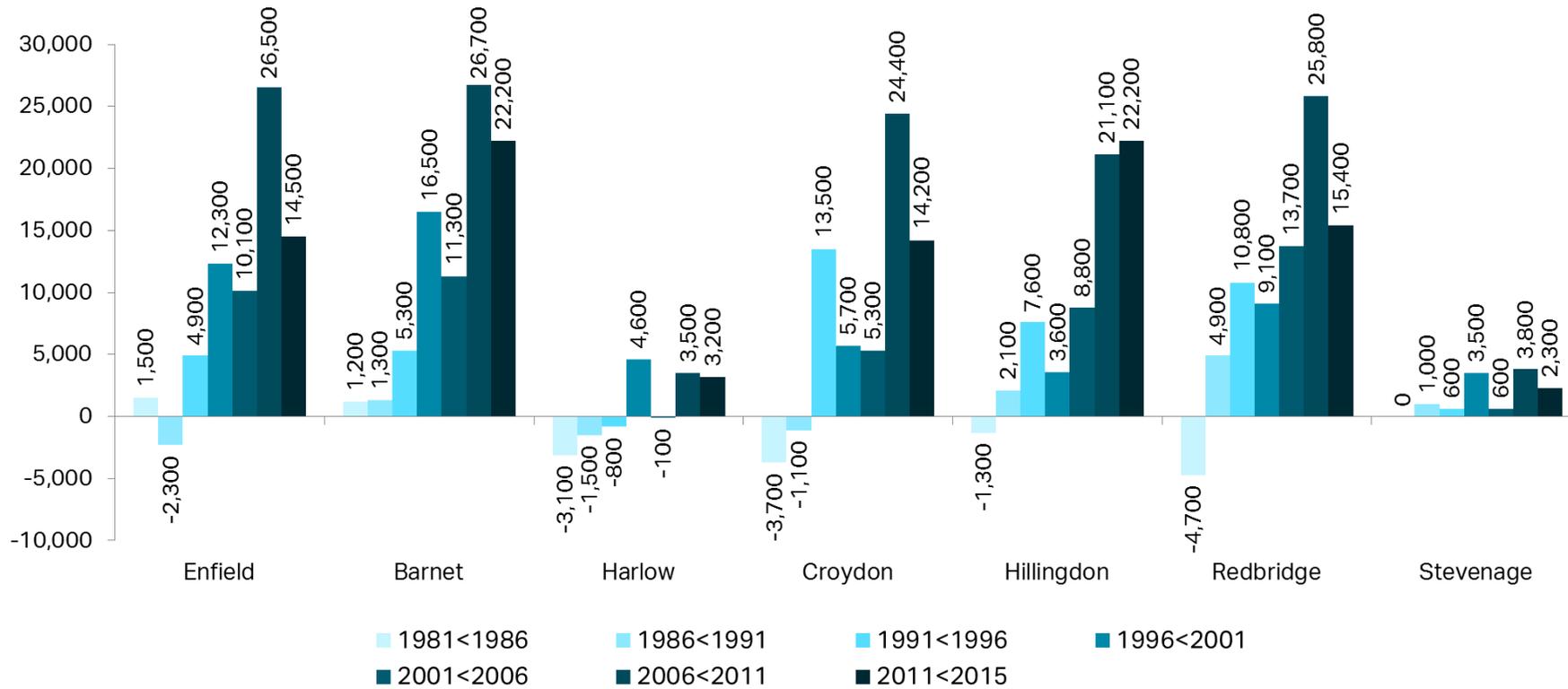
Figure 2-2: Population growth in the Local London Group boroughs



Source: Census Mid-Year Population Estimates 2016

2.1.4 **A populous borough growing at average rates for Outer London but faster than South East England.** Figure 2-2 shows that within the LLG, Enfield is the second most populous borough, although it has grown relatively slowly compared with many of the LLG comparator boroughs since 2004.

Figure 2-3: Population change by five year interval in Enfield and comparator Boroughs



Source: ONS APS 2016

- 2.1.5 **67,500 additional residents since 1981.** Figure 2-3 shows long term demographic trends for Enfield, broken down by 5 year intervals. Enfield’s population declined slightly in the 1980s, grew moderately in the 1990s, before starting to grow rapidly from 2006. Growth rates have remained high since then and population is forecast to continue to grow, albeit at slightly slower rates. It is worth noting that growth forecasts are based on demographic trends and do not account for endogenous changes that could be brought about by major policy changes (e.g. land use allocations), strategic infrastructure provision (e.g. Crossrail (CR2)) or regeneration investment (e.g. Meridian Water).
- 2.1.6 **Strong population growth between 2006 and 2011.** Looking at each interval in more detail reveals a period of slow growth during the 1980s, then moderate growth through the mid-2000s, and a period of higher growth since, particularly between 2006 and 2011. This high growth phase is reflected across all London comparators areas, which have also grown faster in absolute terms than areas outside the capital such as Harlow and Stevenage.
- 2.1.7 **Similar growth trends to other parts of London.** Though Enfield’s population growth has increased significantly, in the London context, higher long term growth rates have been seen in Barnet, Redbridge and Hillingdon.

Figure 2-4: Growth in working age and non-working age populations in Enfield and comparator areas



Source: Census Mid-Year Population Estimates 2016

- 2.1.8 **Moderate growth in working age population.** Figure 2-4 shows that between 2000 and 2015 the working-age population (16 – 64 year olds) of Enfield grew by 18.1%, which is slightly faster than that seen across Outer London on average (16.6%) but slower than that for some of the boroughs which comprise the FEMA, such as Haringey (26.4%), Waltham Forest (24.9%) and Barnet (19.5%).

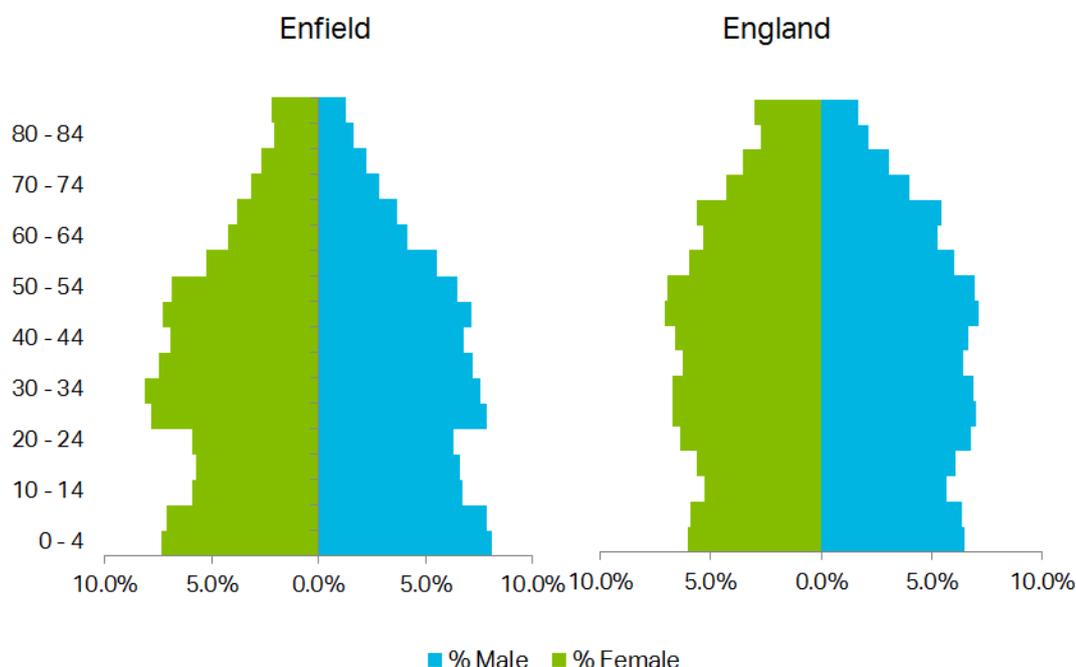
2.1.9 **The high growth of non-working population is actually driven by the large share and rapid growth in the young residents in the Borough.** While **Figure 2-4** shows that the non-working age population has been growing faster in percentage terms than the working-age population, as shown in **Figure 2-5** below, in 2015, there were 1.8 times more residents aged 0-15 years old than those 65 years and over; and the young population growth over 2000-2015 had been 16.4 percentage points higher than that of the age 65+ population.

Figure 2-5: Number and growth of residents by age categories, in Enfield and comparator areas and Outer London

	<i>Enfield</i>	<i>Outer London</i>
Residents age 0-15	74,800	1,033,600
<i>Growth 2000-2015</i>	<i>28.1%</i>	<i>21.0%</i>
Residents age 16-64	211,600	3,406,200
<i>Growth 2000-2015</i>	<i>18.1%</i>	<i>16.6%</i>
Residents age 65+	42,000	686,400
<i>Growth 2000-2015</i>	<i>11.7%</i>	<i>14.2%</i>

Source: Census Mid-Year Population Estimates 2016

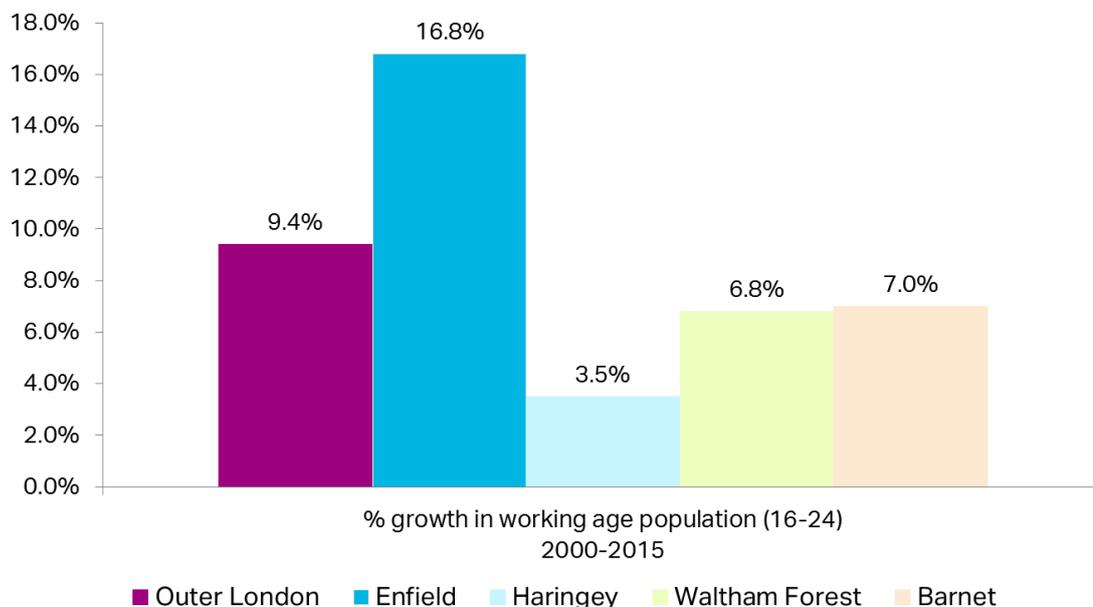
Figure 2-6: Demographic pyramids for age bands in Enfield and England, 2015



Source: Census Mid-Year Population Estimates 2016

2.1.10 **A higher proportion of younger residents than the England profile.** Additionally, **Figure 2-6** shows the demographic structure of Enfield in comparison to England is weighted towards a higher proportion of children < 15 years old (21.5% compared to 17.9%) and young working age residents < 35 years old (49.5% compared to 44%).

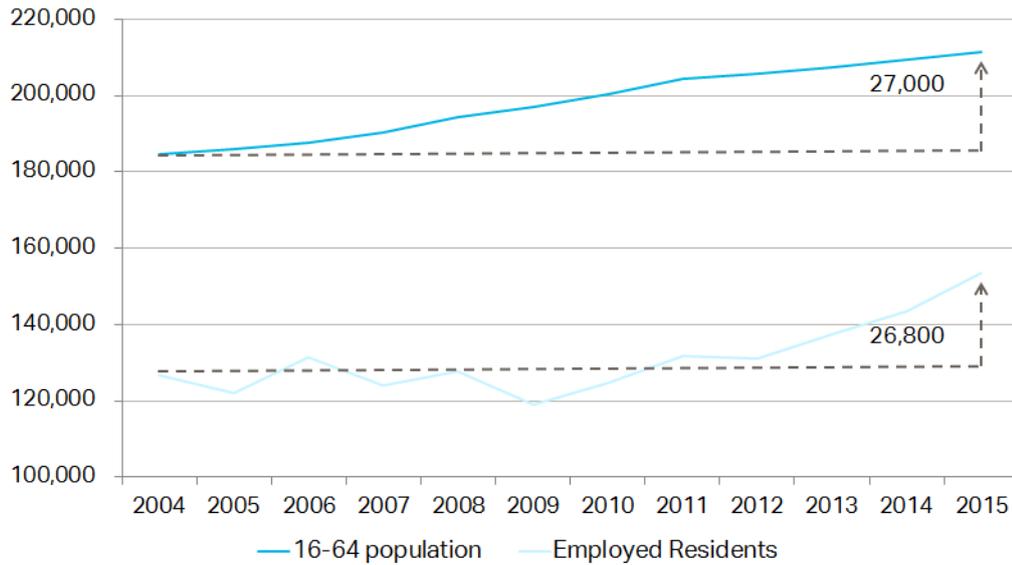
Figure 2-7: Growth in population band 16-24 years old in Enfield and comparator areas



Source: Census Mid-Year Population Estimates 2016

2.1.11 **Especially high population growth in the 16-24 age band.** Young people of working age population can be drivers of creativity, entrepreneurship and economic productivity and the 16- 24 years old band is a key age band with potential to contribute to the economy. **Figure 2-7** shows that since 2000 Enfield has had a significantly faster growing 16-24 age band, that with greatest life-time economic potential, than Outer London and neighbouring boroughs.

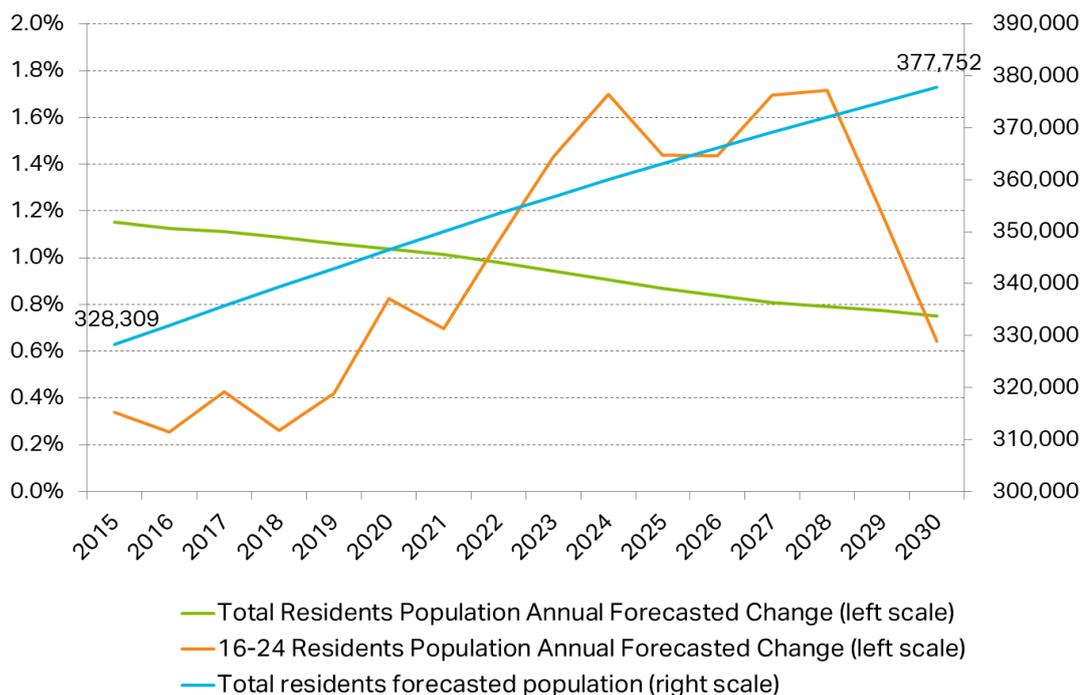
Figure 2-8: Growth in working-age population and growth in number of employed residents in Enfield, 2004-2015



Source: Census Mid-Year Population Estimates 2016

2.1.12 **A similar increase in the number of additional employed residents and the number of working-age residents.** As shown in **Figure 2-8**, between 2004 and 2015, Enfield has added 27,000 residents to the total working age population (16-64 years old). Over the same period, the number of employed residents in Enfield has increased by almost the exact same amount at 26,800. However this does not mean that those residents entering the working age band have all found employment or that the increase in employment opportunities have all come about within Enfield.

Figure 2-9: Forecasted population growth in Enfield



Source: GLA Population Growth Forecast Live Tables 2016

2.1.13 **An additional 45,700 residents by 2030.** Enfield's population could reach almost 380,000 people by 2030, as shown in **Figure 2-9** above, with annual growth rates slowing from 1.2% a year currently to 0.8% a year by 2030. The rate of growth in the 16-24 year old age band is set to increase rapidly in the medium term.

Summary

2.1.14 Trend and forecast population growth in Enfield implies a likely steady increase in the consumption base of the local economy. In 2015, Enfield had a population of 328,400, with 211,600 residents (64%) of working age.

2.1.15 As mentioned above, growth forecasts do not account for major interventions which would impact these figures. Planning policy, major regeneration projects, such as Meridian Water, and new transformative infrastructure projects, such as CR2, all have the potential to drive population growth over and above that forecast.

2.1.16 Enfield has a relatively young population compared to the English average, an attribute common to Outer London boroughs. However, it has a significantly higher growth rate in young population compared to other Outer London boroughs. This is a strength for the local economy as it should reduce the dependency burden of the non-working age population and can support entrepreneurialism. However, it could also be a structural risk if this part of the population is unable to find suitable, sustainable long-term employment.

2.2 Employment and Local Resilience²

Introduction

2.2.1 This section studies a number of key metrics of Enfield's economy, including employment composition and the structure of the labour market. The analysis provides a view on which key employment sectors in Enfield are growing or contracting. By viewing the dynamic change in Enfield's economy in relation to other areas those sectors in which Enfield may have a competitive advantage and opportunities to strengthen and consolidate its economic base can be identified.

2.2.2 This section provides analysis of:

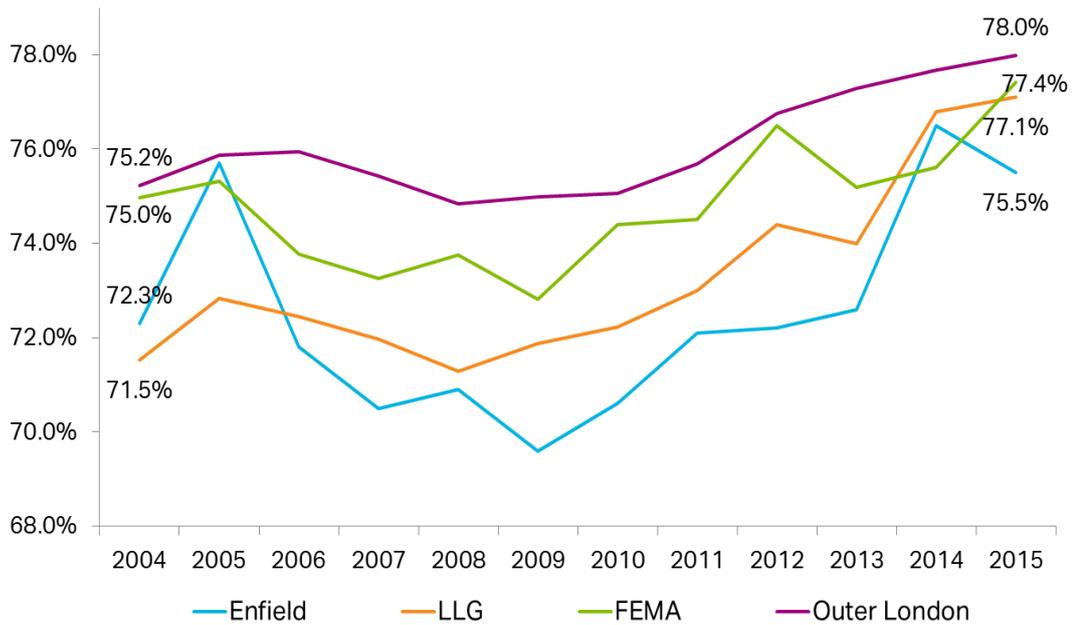
- The general economic profile, including economic activity and inactivity, unemployment and job density; and
- The sectoral economic profile, including current and historic analysis of the economy and labour market by broad industrial group and Standard Industrial Classification of Economic Activities (SIC) 2007 2-digit subsectors.

Analysis

<i>Key Economic Indicators (Latest Data)</i>	<i>Enfield</i>
Real GVA per head, 2014	£22,536
Unemployment rate, 2016	5.8%
Economic activity rate, 2016	75.5%

² The term 'local resilience' is used to define the reliance and degree of dependency of local employment on specific sectors which may be at risk under particular exogenous circumstances, such as business cycles, technological or policy change.

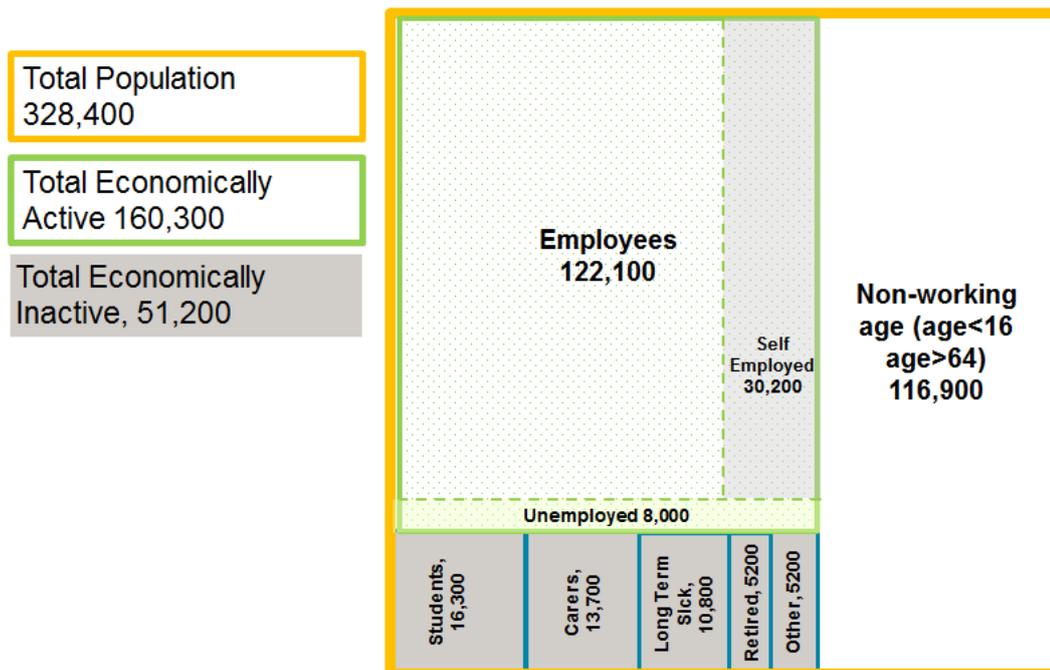
Figure 2-10: Economic activity rate change in Enfield and comparator areas



Source: ONS APS 2016

2.2.3 Enfield has below average economic activity rates, with 160,300 economically active residents (76%) in 2015, compared to 78% in Outer London. The economic activity rate is the proportion of local residents in the labour market as employees, self-employed or unemployed, but not including those who are not actively looking for employment. **Figure 2-10** shows that Enfield’s economic activity rate has tended to be lower than that of comparator areas, though the gap has closed in the past few years.

Figure 2-11: Composition of economic activity in Enfield, 2016

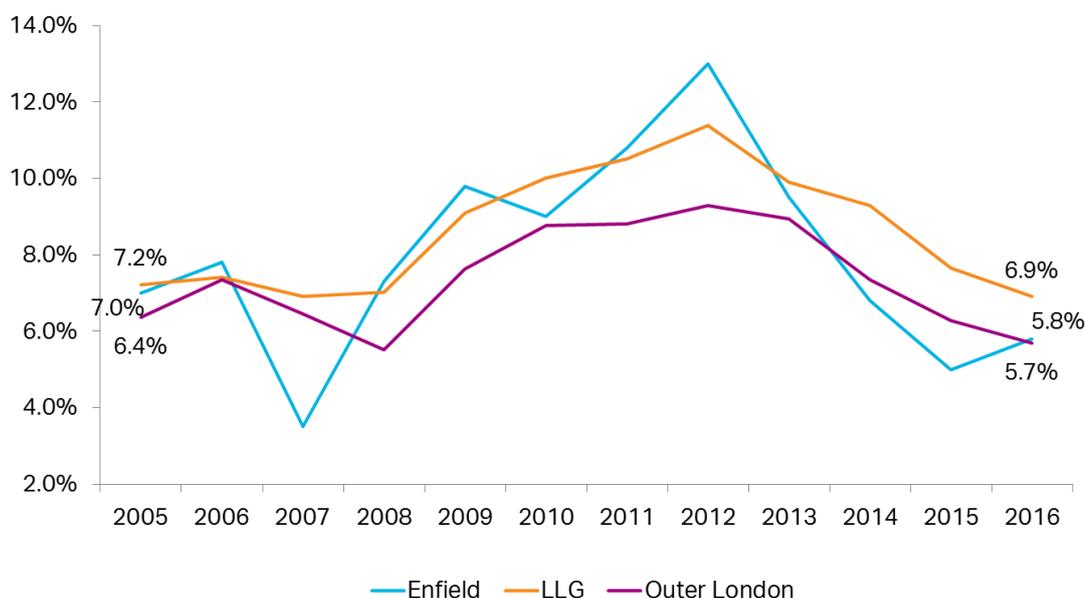


Source: ONS APS 2016

2.2.4 **Almost a third of economic inactivity is accounted for within the student population.** The economic activity rate is the proportion of local residents in the labour market as employees, self-employed or unemployed but not including those who are not actively looking for employment, which is the economic inactivity rate. The economic activity rate is therefore a proxy indicator for the number of economically productive residents, although within the definition of 'inactivity' are activities which have a clear economic value including full-time education and caregiving. Enfield has below average economic activity rates, with 160,300 economically active residents (around 76%) in 2015, compared to 78% in Outer London. **Figure 2-10** shows that Enfield's economic activity rate has tended to be lower than that of comparator areas, though the gap has closed in recent years.

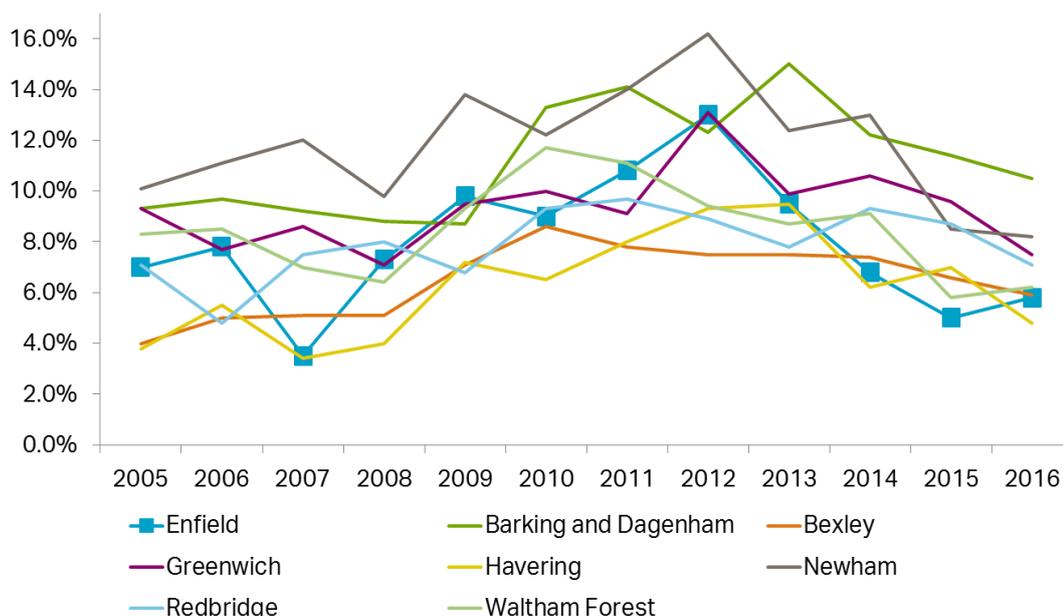
2.2.5 **Figure 2-11** provides a whole labour market view and shows that in 2016 there were 51,200 economically inactive residents of working-age in Enfield, compared to 160,300 active ones. Nearly a third (31.3%) of these inactive residents were students, and 10% were retired. This partially explains the relatively low economic activity rates in the Borough.

Figure 2-12: Unemployment rate in Enfield and grouped-average areas



Source: ONS APS 2016

Figure 2-13: Unemployment rate in Enfield and comparator areas



Source: ONS APS 2016

2.2.6 A volatile unemployment rate. Figure 2-12 shows that Enfield has a greater variance between the highs and lows of its unemployment rate than the LLG and Outer London. Figure 2-13 shows that this high volatility rate still exists even in comparison with individual comparator areas in the LLG, of which Enfield has the highest variance in its unemployment rate, ranging from having the lowest level of unemployment in 2007 to the second highest in 2012³. A volatile unemployment rate can be the consequence of a number of factors, including vulnerability to business cycles or intra-sectoral factors such as the relocation of a large business and impacts on its supply chain. The sectoral and labour market analysis below may help to allude to why employment volatility may be an attribute of the Enfield economy.

2.2.7 Employment levels in the Borough have picked up since 2009 with unemployment in the local economy declining since 2011. In the previous section, Figure 2-8 shows that total employment growth in Enfield, having been stagnant since 2004, began to pick up around 2009. However, as shown in Figure 2-12 and Figure 2-13, the unemployment rate only started to decline in 2011 (in line with stabilisation and improvement in the wider UK economy). This occurred as employment growth (both inside and outside the Borough) began to grow at a faster rate than growth in the local working age population (as also depicted in Figure 2-8).

³ Variance is a mathematical indicator measuring the variability between a set of values and the mean: here, it gives an indication of the volatility of the unemployment rate over time for each LLG comparator area compared to the LLG average value over time. Variance for unemployment in Enfield between 2005 and 2016 was 0.000694, which is 3.6 times higher than Redbridge (0.00019); 3.5 times higher than Bexley (0.0002); 2 times higher than Waltham Forest (0.00035); 1.6 times higher than Greenwich (0.00026); 1.5 times higher than Barking and Dagenham (0.00047); and 1.2 times higher than Newham (0.00056).

Figure 2-14: Job density change in Enfield and comparator areas

Source: ONS Job density 2016

2.2.8 An increasing job density ratio indicating more local jobs. Figure 2-14 shows a job density ratio of 0.61 in 2014 meaning that there are 61 jobs within the Borough's boundary for every 100 residents in Enfield. This has increased from 55 jobs per 100 residents in 2009. The degree of self-containment of jobs in a Borough is largely dependent on the type of work available within the Borough and outside it. As analysed later in this report, many Enfield residents will commute to jobs outside its borders, particularly to the Central Activity Zone (CAZ). To understand the job density ratio better **Figure 2-15** below outlines the provision of jobs within the major employment sectors in Enfield.

2.2.9 An economy predominantly focused around the health, retail, education and business services sectors. In 2015, the industry groups with the highest proportion of employed workers in Enfield were Health (16%), Retail (13%), Education (12%), and Business Services (10%). As shown in **Figure 2-15**, the most specialised sector in comparison to both Great Britain and London was Wholesale (with a location quotient (LQ) of 1.50 and 1.94 respectively)⁴. In terms of the Borough's job density, the number of local jobs in certain sectors such as Health, Retail and Education, are likely proportionate to population size. However, many high-value, high-wage or specialised jobs are located in Central London, to which many Enfield residents commute (see below), reducing the local job density ratio. An increasing jobs density ratio is a result of more Enfield residents employed locally.

⁴ Location quotients provide a comparison measure of the relative size of an employment sector. A location quotient greater than 1.0 means that the concentration of employment in the sector is above the Great Britain average, whereas a location quotient below 1.0 means it is below the Great Britain average. The higher the location quotient the greater the industry specialisation. Industry sectors with high location quotients often pinpoint those sectors where the local economy has a comparative advantage.

Figure 2-15: Enfield's economy (employees) by broad industrial groups, 2015⁵⁶

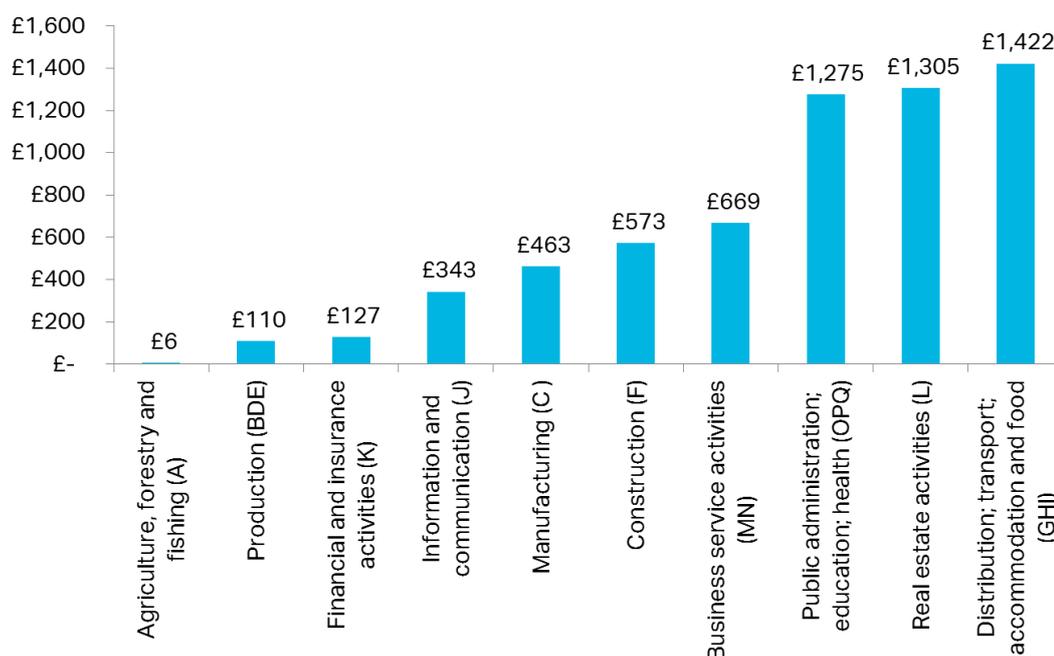
<i>Broad Industrial Group</i>	<i>Number of people employed</i>	<i>%</i>	<i>LQ of Enfield relative to London</i>	<i>LQ of Enfield relative to GB</i>
Agriculture, forestry and fishing (excluding farm agriculture) (A)	< 100	0.1	N/A	N/A
Mining, quarrying & utilities (B)	854	0.8	1.33	0.62
Manufacturing (C)	5,395	5.3	2.30	0.65
Construction (D)	5,029	5.0	1.79	1.11
Motor trades (E)	1,925	1.9	2.38	1.06
Wholesale (F)	6,127	6.0	1.94	1.50
Retail (G)	12,838	12.7	1.46	1.28
Transport & storage (including postal) (H)	5,901	5.8	1.26	1.26
Accommodation and food services (I)	5,669	5.6	0.74	0.79
Information & communication (J)	3,294	3.3	0.42	0.79
Financial & insurance (K)	1,604	1.6	0.22	0.46
Property (L)	2,266	2.2	0.81	1.29
Professional, scientific & technical (M)	4,550	4.5	0.33	0.54
Business administration & support services (N)	10,014	9.9	0.93	1.13
Public administration & defence (O)	3,574	3.5	0.80	0.80
Education (P)	12,036	11.9	1.51	1.29
Health (Q)	16,474	16.3	1.60	1.23
Arts, entertainment, recreation & other services	3,645	3.6	0.73	0.82
Total people employed, Enfield	101,280	-	-	-

Source: BRES 2016

⁵ BRES data includes all workers being paid by business payroll. Hence, it only comprises part of the self-employed worker population, and doesn't include unpaid people working in family business, government supported trainees or agency workers paid from agency payrolls.

⁶ Highlighted in the grey boxes are, in the second column, the 4 largest employment sectors, and in the fourth and fifth columns the LQ values that show specialisation, either in relation to London or to Great Britain.

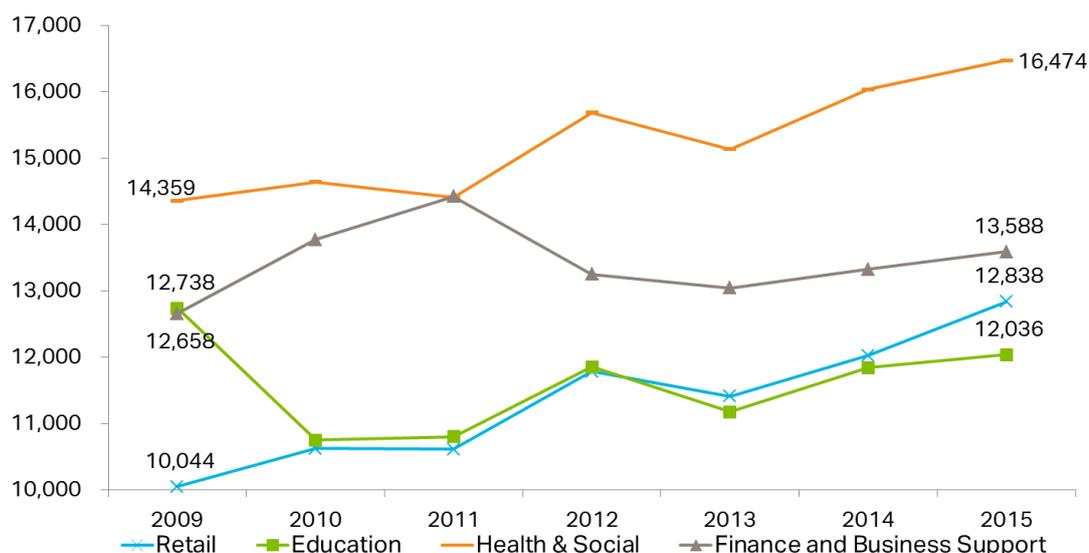
Figure 2-16: Enfield's GVA per sector (detailed by broad industrial group), in 2015 (in million £)



Source: ONS Regional Gross Value Added (Income Approach) 2016

2.2.10 Significant differences between output (in GVA terms) and jobs by sector in Enfield. GVA is an approximate measure of how much monetised economic output is created by each unit input of labour. **Figure 2-16** above shows that real estate activities (SIC broad industrial group L) only accounted for 2.2% of the people employed in Enfield in 2015, but generated £1,305m of GVA, which represents 20.7% of the total GVA in 2015. On the other hand, while public administration, education and health accounted for 31.7% of people employed in Enfield, they only generated a share of the total 2015 GVA of 20.2%. Traditionally, public sector employment activities produce lower GVA per role. Some high-GVA jobs like real estate activities are again likely limited for jobs growth potential as they are intrinsically proportionate to the scale of the population and activity in the real estate market.

Figure 2-17: Employment change in Enfield in the four largest employment sectors, by number of people employed and broad industrial groups⁷



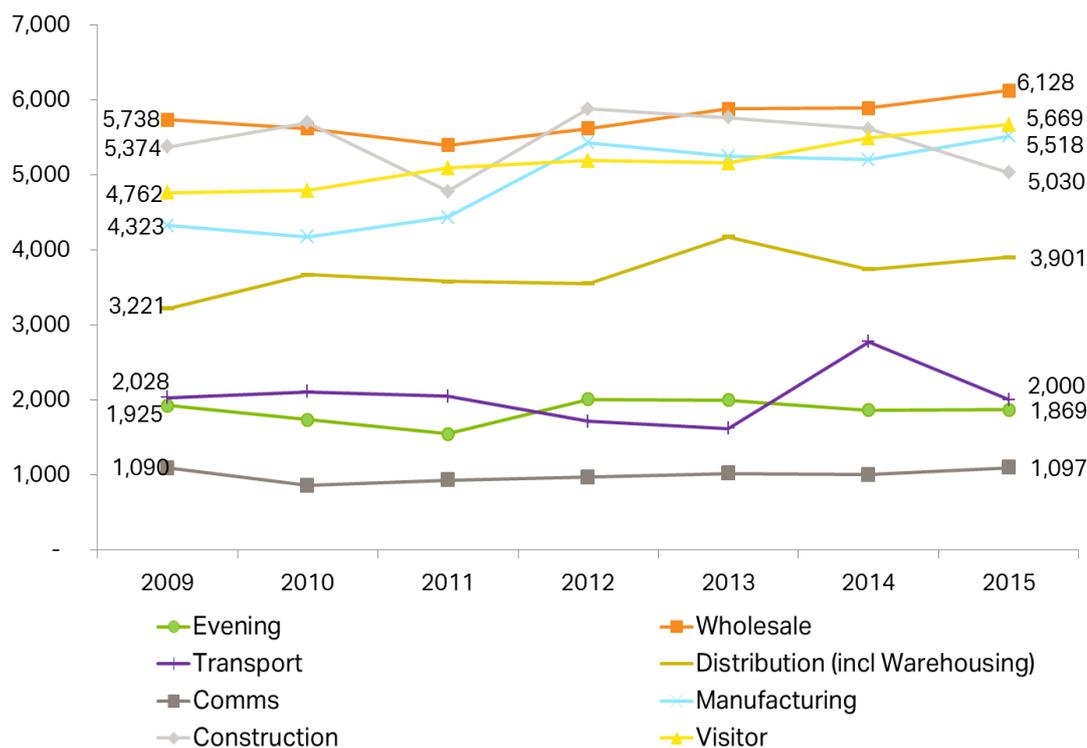
Source: BRES 2016

- 2.2.11 Strongest growth in major employment sectors over the last six years has been in retail and health and social care.** Figure 2-17 shows that Enfield's four largest sectors by employment are retail, education, health and social and financial and business support services. Driven by a growing population base and an ageing population, there has been increased demand for retail, health and social care goods and services. These sectors have been the fastest growing 'large' sectors in Enfield (growing by 27.8% and 14.7% respectively post 2008). Comparatively, Finance and business support grew by 7.4% over the same period.
- 2.2.12 Relative decline of the education sector.** Figure 2-17 also shows that between 2009 and 2015 employment in the education sector declined by 4.9%. Rather than a general tendency throughout the whole educational sector, this decline is attributable to the loss of employment in specific subsectors such as tertiary education (which has disappeared almost entirely in Enfield since 2009 – a consequence of the closure of Middlesex University campus closures at Ponders End and Trent Park) and technical and vocational secondary education (- 46% since 2009).

⁷ Note: the sectors presented in this analysis have been computed from SIC 2007 codes, and do not necessarily reflect the analysis by broad industrial sector which was presented in Figure 2-15.

2.2.13 **Strong growth in the retail sector relative to the FEMA and the LLG.** As shown in **Figure 2-17** and in **Figure 2-18** below, employment in the retail sector has grown continuously between 2009 and 2015, both in absolute terms and when compared to other areas. In particular, this growth appears to be driven by a rise in the number of employees in the retail sale of furniture and lighting⁸ (+88% since 2009) and in the retail sale of non-specialised stores with food, beverages or tobacco predominating⁹ (+38% since 2009, compared to -3% in England).

Figure 2-18: Employment change in Enfield in smaller employment sectors, by number of people employed



Source: BRES 2016

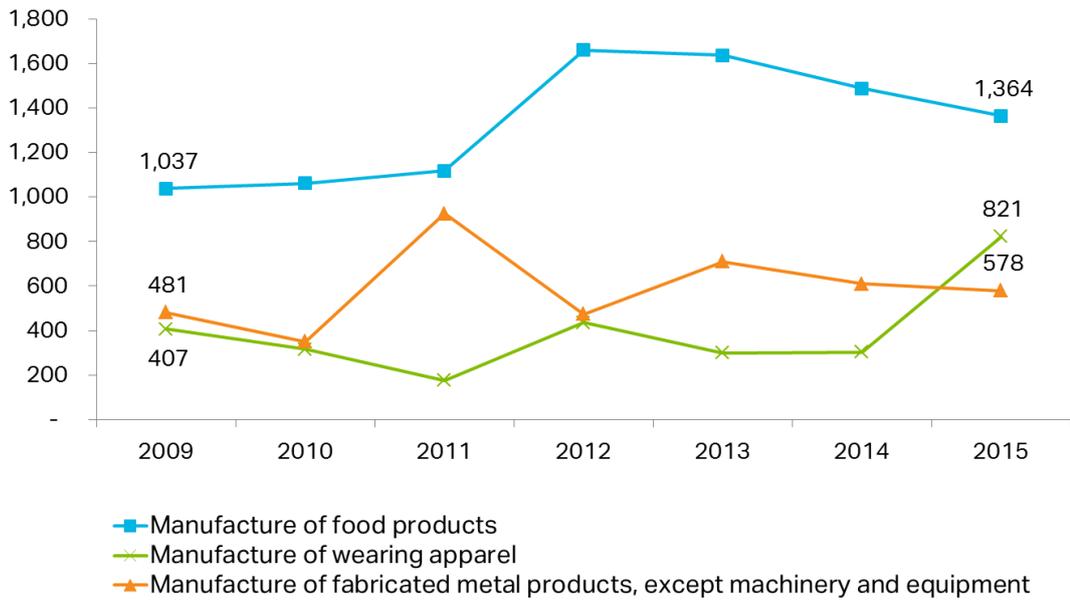
2.2.14 **Strong growth in manufacturing and distribution.** For smaller sectoral concentrations, manufacturing, distribution, and the visitor economy¹⁰, have been the three fastest growing areas across these eight sectors (each growing by 28%, 21%, and 19% respectively post-recession). In particular, as illustrated in **Figure 2-19**, the manufacturing sector in Enfield is based on significant amounts of employment in food products production, which will include the glasshouse industry; as well as the wearing apparel and metal products subsectors.

⁸ SIC 4-digit

⁹ SIC 4-digit

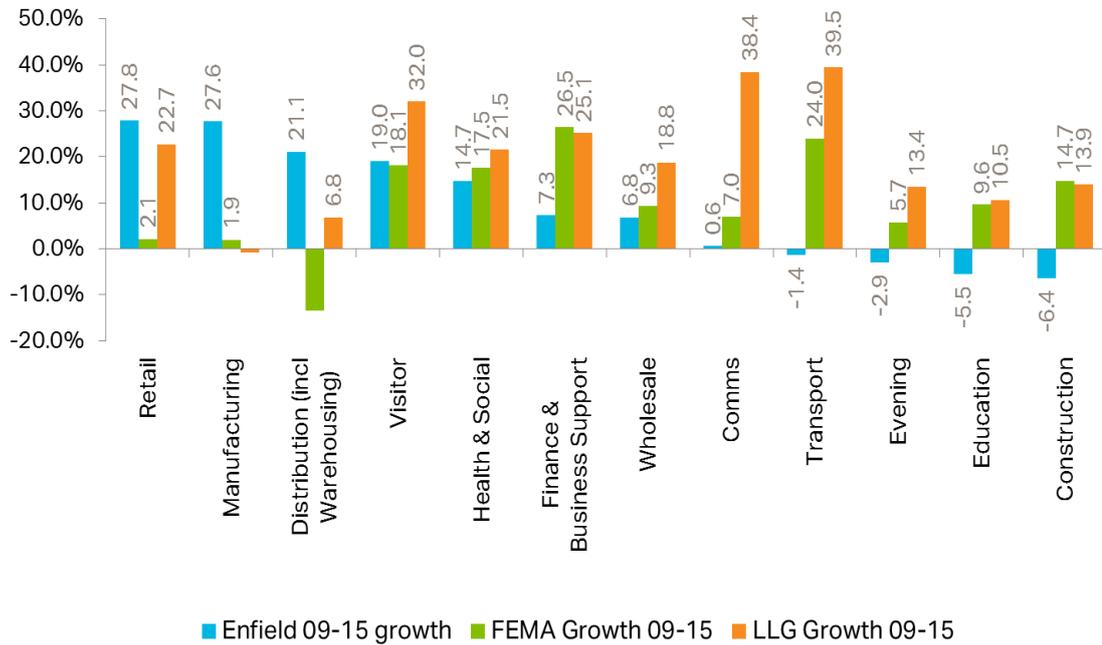
¹⁰ Defined as SIC 2007 section I: 'Accommodation and food service activities'

Figure 2-19: Employment change in Enfield in the three largest manufacturing subsectors, by number of people employed



Source: BRES 2016

Figure 2-20: Sectoral growth in Enfield and comparator areas

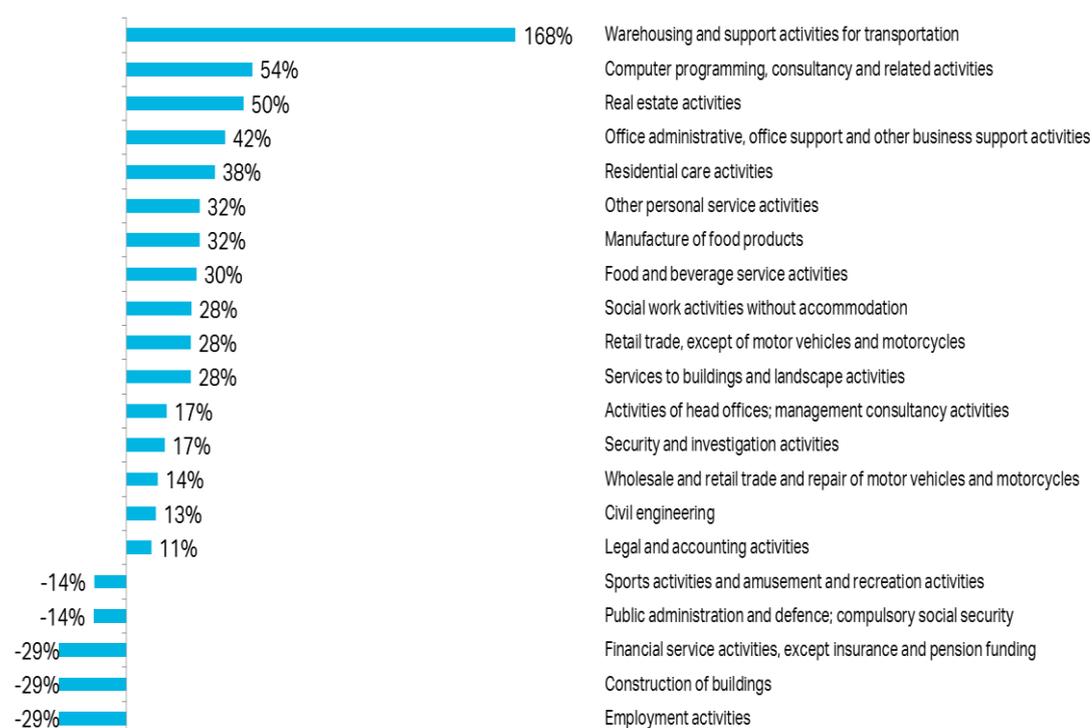


Source: BRES 2016

2.2.15 **Enfield has different growth dynamics compared to wider-London trends.**

Figure 2-20 above and also the sub-sectoral analyses in **Figure 2-21** below (and in paragraphs 2.2.17 and 2.2.18) show employment change in key sectors in Enfield since 2009 often following different trends to those of the LLG and the FEMA. In particular, Enfield’s high manufacturing and distribution and warehousing growth contrasts sharply with low growth or decline in these sectors in comparator areas. Absolute decline in employment in the transport, evening, education and construction sectors, contrasts with reasonable growth in these sectors in the LLG and FEMA. It is worth noting, and as examined in more detail in **Figure 2-21** and **Figure 2-22** below, that within these broad categories, there will be much variance in the performance of individual sub-sectors, such as the ‘computer programming, consultancy and related activities’ sub sector which has added 773 new jobs in Enfield since 2009 (54% growth), despite low growth (7.3%) in the overarching Finance and Business Support sector of which it is a component.

Figure 2-21: Enfield’s sectoral growth 2009-2015, by fastest and slowest growing subsectors (SIC 2-digit) employing more than 1,000 people



Source: BRES 2016

2.2.16 **A number of high growth sectors.** Focusing on those sectors which have grown

Figure 2-21 shows that there has been significant growth in warehousing and support activities for transportation. In particular, when excluding the ‘support activities for transportation’ part from the subsector ‘Warehousing and support activities for transportation’, the sectoral growth for the remaining warehousing and storage activities amount 277% between 2009 and 2015, compared to a national average growth of 56%.

2.2.17 The absolute growth in jobs in the five fastest growing industries between 2009

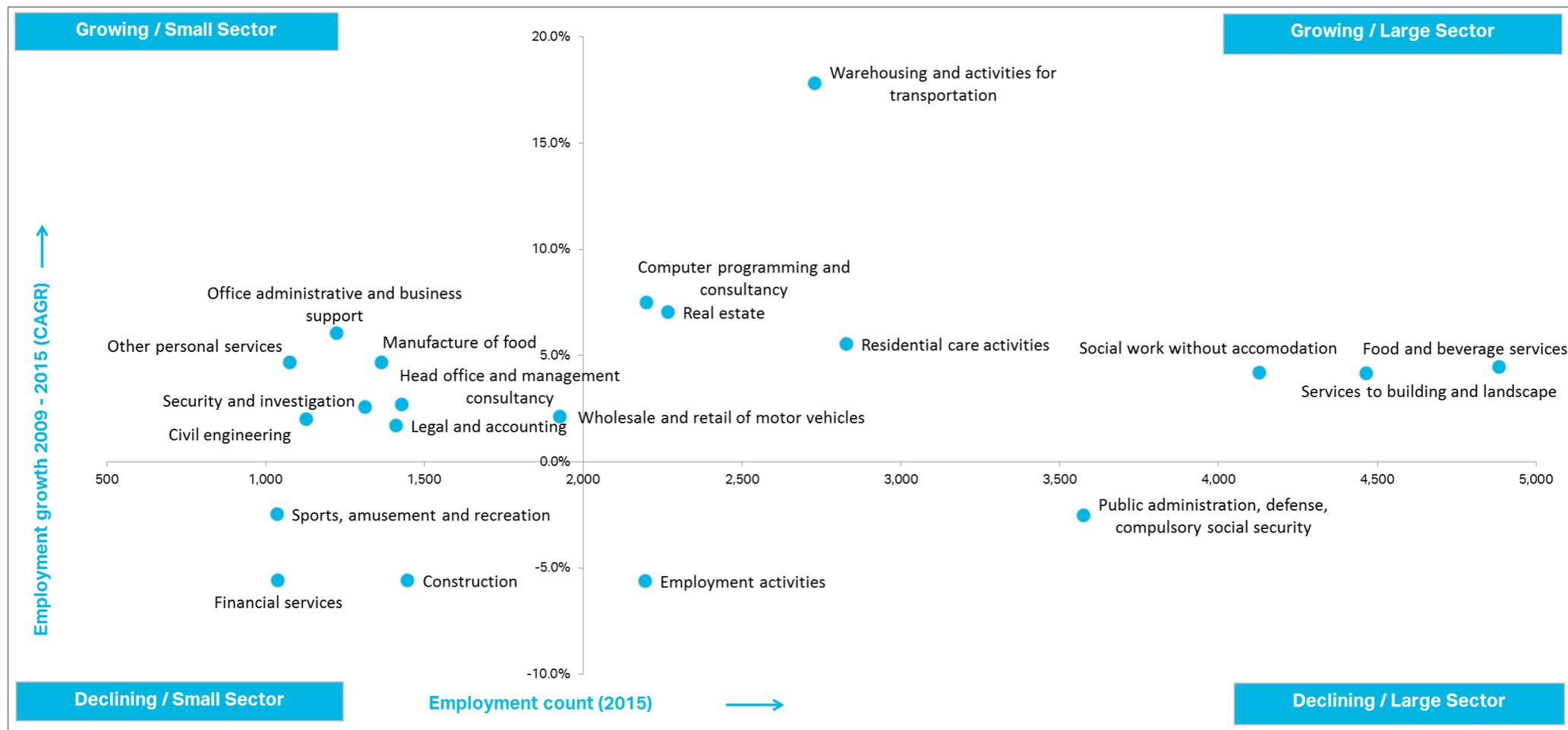
and 2015 were:

- Warehousing and support activities for transportation, +1,709
- Computer programming, consultancy and related activities , +773
- Residential care activities, +782
- Real estate activities, +760
- Office administrative, office support and other business support activities, +363; and
- Over +2,800 jobs were also added in retail trade.

2.2.18 However, there have been a number of sectors which have seen contraction in employment during the period 2009 and 2015. These are:

- Employment activities, - 810
- Construction of buildings, -594
- Public administration and defence; compulsory social security -590
- Financial service activities, except insurance and pension funds -426; and
- Sports activities and amusement and recreational activities, - 167.

Figure 2-22: Enfield's sectoral employment (absolute) and employment growth (%) in 2015, by fastest and slowest growing subsector (SIC 2-digit) employing more than 1,000 people



Source: BRES 2016

2.2.19 **Enfield has seven comparatively large and growing sectors.** Figure 2-22 shows the sub-sectors within which Enfield may be developing specialisms (as high employment, high growth industries) and those sub sectors which are comparatively declining in Enfield as key employers. Of particular interest are the industries in the top right quadrant, which are those industries that are both large employers (> 2,000 employees) and are growing. Within this group there are seven sectors: warehousing and activities for transportation; computer programming and consultancy; real estate; residential care activities; social work without accommodation; services to building and landscape; and food and beverage services activities. By contrast large sectors in decline (bottom right) which outline where a large number of jobs might be at risk, include some key public sector jobs. In the top left quadrant we see industries which while small are growing.

Summary

2.2.20 There are currently around 8,000 unemployed people in Enfield about 5.8% of the population who are economically active and aged over 16. Meanwhile, there is a large economically inactive population of around 52,000 residents, i.e. those who are not classed as 'unemployed' as they are not actively seeking work. The majority of the economically inactive are students (16,300), carers (13,700), long term sick (10,800) and retired (5,200). Just over one quarter of this group 'wants a job'.

2.2.21 Analysis of the breakdown of key employment data by sector over time shows Enfield's economy performing differently to the majority of comparator Boroughs and broader trends for many industries. The high growth in manufacturing and warehousing and distribution in Enfield differs from Outer London.

2.2.22 As referenced in paragraph 2.2.6, no other comparator area has greater variance in unemployment levels, where Enfield had low unemployment levels pre-recession and relatively very high unemployment during recession years, suggesting the types of employment in Enfield, or undertaken by Enfield residents are susceptible to volatility under market conditions. High levels of employment in retail – as a consumption driven sector – and the public sector, impacted by funding constraints post-recession, could explain this volatility.

2.2.23 Enfield exhibits marked differences with comparator areas in the FEMA and the LLG for growth by industry. In particular, strong growth in manufacturing and distribution (including warehousing) is unique to Enfield compared to Outer London.

2.3 Enterprise

Introduction

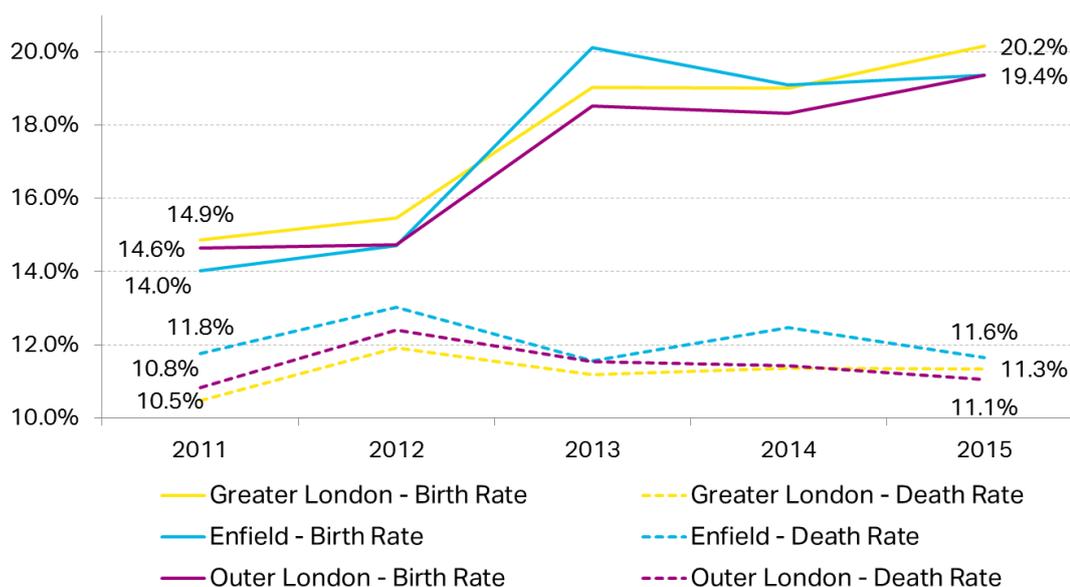
2.3.1 This section analyses the attributes of businesses located within Enfield, including their size, growth and likelihood of survival. With this information it is possible to assess the vibrancy and dynamism of the Enfield economy and, based on past trends, identify the future of the type of business and employment growth that will take place within the Borough.

2.3.2 This section on presents analysis on:

- Birth and death of new enterprises, including historic trends and survival rates; and
- Size and breakdown of firms.

Analysis

Figure 2-23: Business birth and death rates in Enfield and comparator areas¹¹



Source: ONS Business demography 2015

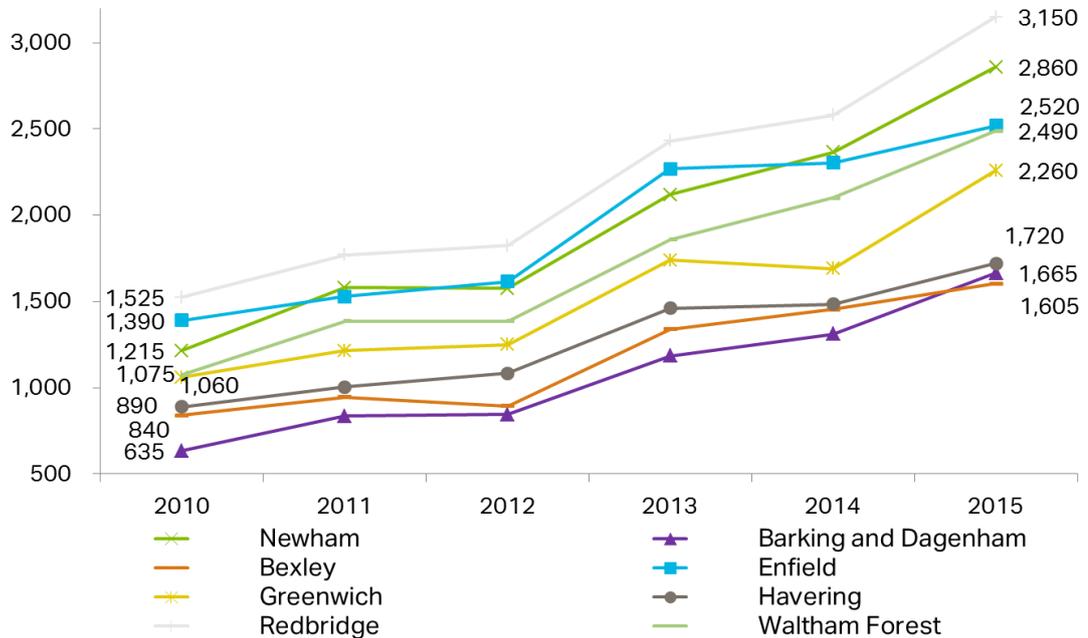
2.3.3 **A growing business base.** Figure 2-26 shows that the number of active enterprises in Enfield had grown between 2010 and 2015. The number of enterprises has increased from 10,920 to 13,925. This increase of 27.5% is only slightly below the Outer London and Greater London averages of 28.8% and 31.0% respectively. During this period, on average, Enfield's business base was growing by 600 new enterprises per year, equivalent to more than 10 enterprises a week. London as a whole has added around 128,000 businesses in this period.

2.3.4 **Higher business creation rate.** As observed in Figure 2-23, this growth has resulted from the business creation rate being higher than the closure or death

¹¹ The business birth rate / death rate for the year N is calculated as: count of newly born enterprises on year N (or number of enterprises which have died) / stock of active enterprises on year N-1.

rate in all years but particularly from 2013 onwards. As a result net additions to the enterprise stock in Enfield amounted to 300 in 2012 and 910 in 2015.

Figure 2-24: Count of birth of new enterprises in Enfield and boroughs of the Local London Group



Source: ONS Business demography 2015

2.3.5 Growing enterprises birth numbers. In 2014 there were 2,305 new enterprises created in Enfield, which is approximately 1.7 times more than in 2010. The rate of business creation particularly accelerated after 2012, for Enfield and other comparator boroughs.

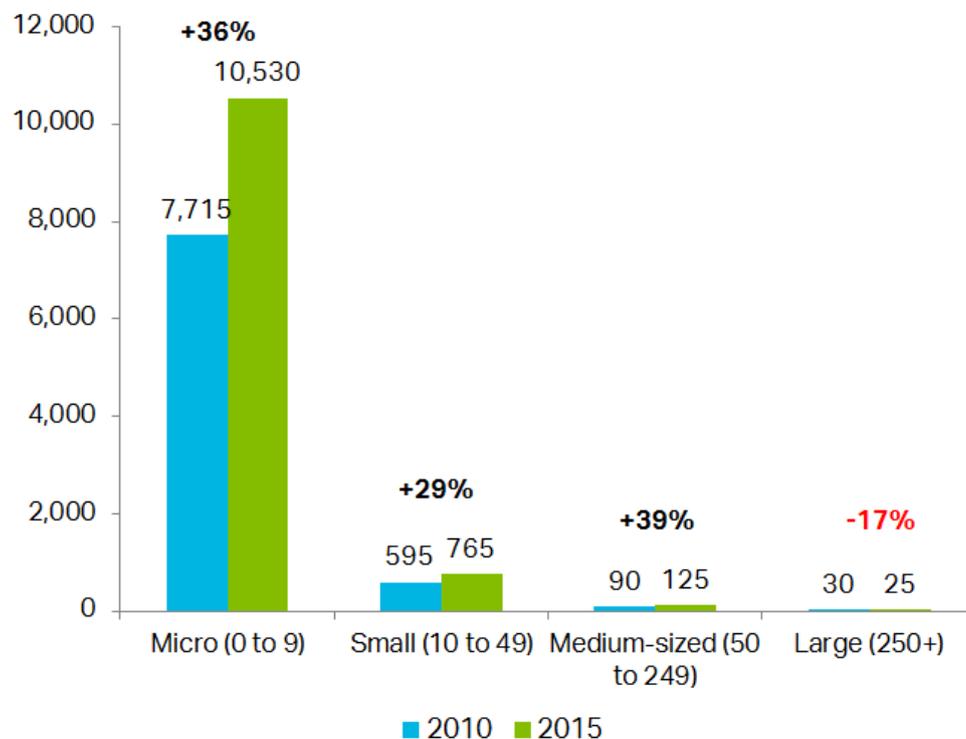
Figure 2-25: Survival rate of new enterprises in Enfield, for units born in 2010



Source: ONS Business demography 2015

2.3.6 **A survival rate for new enterprises above the Outer London average, though marginally.** In 2015, the 5-year survival rate of new enterprises was 40.3%, in line with the England rate (41.4%) and slightly over the Outer London one (38.1%).

Figure 2-26: Absolute number of enterprises by size of businesses and percentage change, in Enfield



Source: UK Business Count 2015 – Enterprises

2.3.7 **Small to mid-sized enterprises are driving growth.** In terms of enterprise size, the growth in the business base has been due to the expansion of micro, small and medium firms, with a decline in the number of large firms. The economic downturn of 2008 seems to have been a driver of business start-up and small firm formation.

2.3.8 The decline in the number of larger enterprises may not mean bankruptcy. There are a range of reasons. For example, larger businesses may downsize (e.g. being numerically flexible in response to market conditions), have merged / been taken over, or have chosen to relocate to other areas outside the borough, pushed/pulled by factors such as access to markets, rental terms, or a lack of suitable land and premises.

Summary

- 2.3.9 Of the 11,445 enterprises in Enfield in 2015, 92.1% or 10,530 were micro firms (0-9 staff) and 765 or 6.7% were small firms (10-49 staff). The area has 125 medium sized firms (50-249 staff) and 25 large firms (>250 staff).
- 2.3.10 The birth and survival rates of new firms in Enfield are reasonable in relation to comparator boroughs and have been better than average since 2012. The majority of growth in firm numbers in absolute terms has been in micro and small sized businesses, with a decline seen in the number of large businesses. The Enfield economy has a good level of entrepreneurship shown by encouraging levels of new and small firm formation.

2.4 Economic Geography

Introduction

2.4.1 Economic geography, including the connectedness of a place and the natural and built assets of its physical location, plays a key role in determining the development of an economy. It dictates which sectors may be more or less likely to thrive depending on their need for access to inputs such as infrastructure, labour, or supply chains. The attractiveness of a particular geography for businesses or skilled labour is also partially affected by wider factors, such as the cost of living (in particular house prices), and the quality of the local environment, both factors which are examined in later sections.

Analysis

2.4.2 Specifically this section focusses on:

- Connectivity and access to employment
- Economic specialisation and sectoral comparative advantage; and
- Innovation.

2.4.3 **Comparatively poor access to Central London jobs.** Figure 2-27 shows that by public transport much of Enfield is not within 45min travel time of the centre of London and so the number of jobs accessible is relatively low compared with other locations. This is the case for most other boroughs located on the periphery of Greater London. By public transport, with the exceptions of Bexley and Havering, it is one of the least well connected boroughs in the LLG.

2.4.4 However, accessibility will improve through the provision of a number of schemes. Examples of committed schemes include:

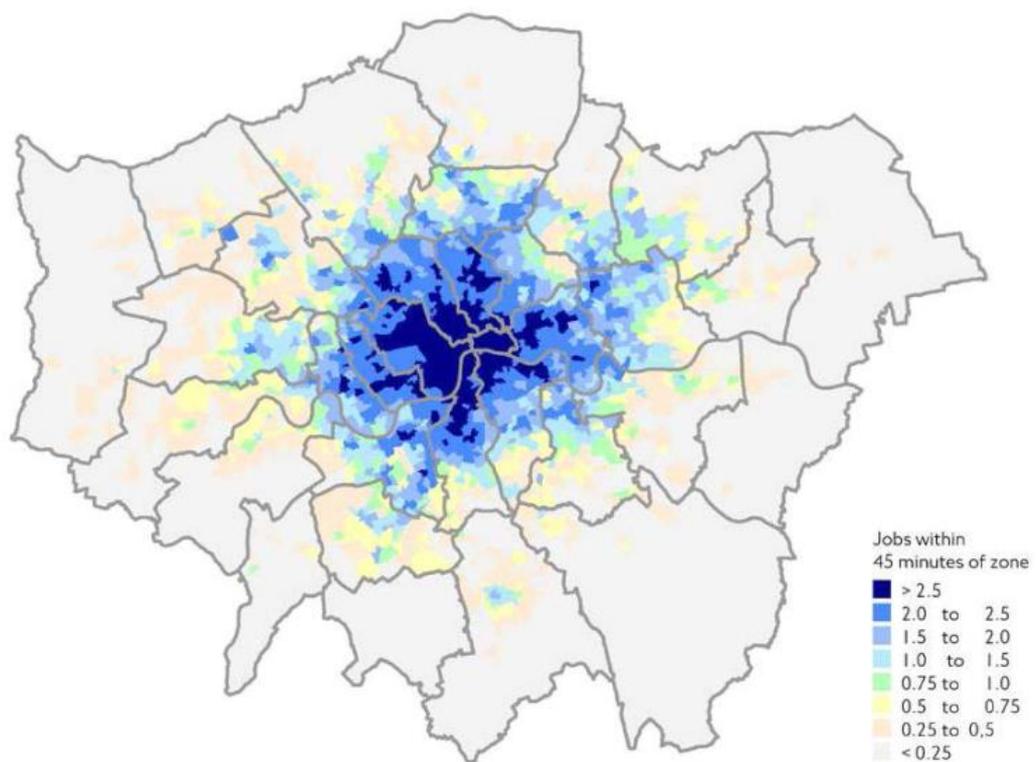
- Four trains per hour service into Meridian Water and Northumberland Park Stations by December 2018; and
- Phased rail infrastructure delivery, including delivery of four-tracking by 2024.

2.4.5 Other transport schemes which are proposed but not yet committed have the potential to drive investment in the local economy, transformational change in the built environment and socio-economic benefits for local people. These include:

- CR2: The proposed route of CR2, which is in its early stages of assessment and planning, follows the existing WAML corridor. Existing plans include new services at four stations in Enfield: Enfield Lock, Brimsdown, Ponders End and Angel Road.
- New M25 Junction 24a and improvements to distributor roads; and
- CA406 Tunnelling project at New Southgate.

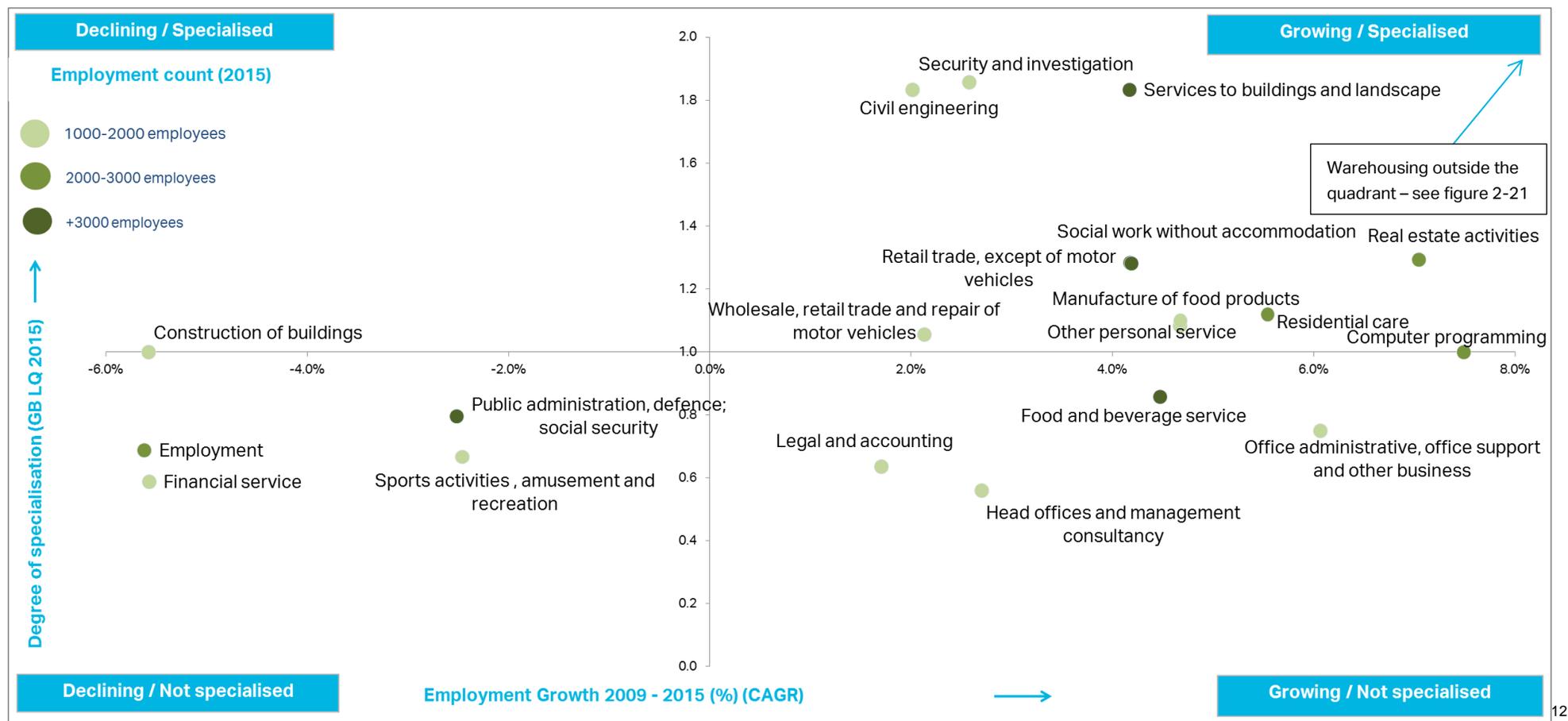
2.4.6 Schemes such as CR2 have the potential to address socio-economic inequalities. Enfield's Eastern Corridor (the area which stretches north – south along the A1055) performs poorly for social inclusion indicators (see IMD analysis below) but would benefit greatly from CR2 which, through investment, would help address deep rooted deprivation issues.

Figure 2-27: Number of jobs available by public transport within 45min travel time, by millions of jobs in 2015



Source: GLA, (2016); Economic Evidence Base for London 2016, GLA Economics

Figure 2-28: Location quotient (LQ) in Enfield compared to Great Britain and employment growth of key industries (excluding warehousing)



Source: BRES 2016

¹² Note: Analysis of workplace jobs i.e. those supported by businesses within the borough. However, the activity of these businesses may take place outside the Borough. For example, the decline in jobs in the sector 'Construction of buildings' does not necessarily mean that construction activity in Enfield has declined.

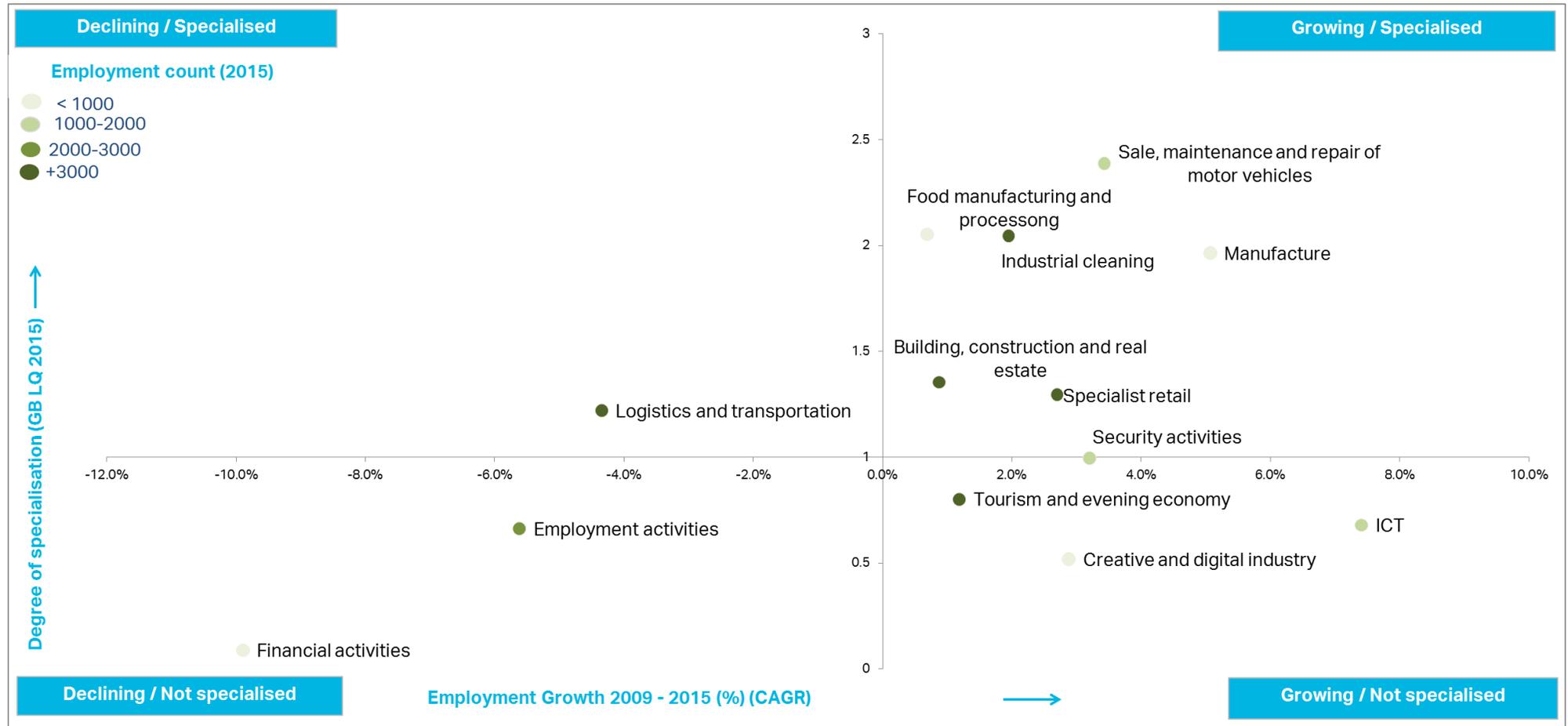
2.4.7 **Ten growing sectors with a comparative advantage.** As shown in **Figure 2-28** previously, Enfield has comparative strengths in a number of sectors that have a significant employment growth and a higher local representation than the UK average indicated by location quotients. Of particular interest are the sectors that are also growing (i.e. those in the top-right quadrant in **Figure 2-28**) and these are:

- Security and investigation (includes, private security firms, security systems, and private investigation)
- Civil engineering
- Services to buildings and landscape (includes, building facilities services, cleaning activities and landscaping)
- Social work without accommodation
- Manufacture of food products
- Residential care activity
- Retail trade (except motor vehicles)
- Other personal service activities (includes, dry cleaning, hairdressing and beauty services, funeral activities, and physical and well-being related services)
- Real Estate; and
- Computer programming, consultancy and related services.

2.4.8 Three of these subsectors (SIC 2-digit) are also large employers locally, employing more than 3,000 in Enfield in 2015. These are:

- Services to buildings and landscape
- Social work without accommodation; and
- Retail trade except of motor vehicles.

Figure 2-29: Location quotient (LQ) in Enfield compared to Great Britain and employment growth of highly innovative sectors^{13 14 15}



Source: BRES 2016

¹³Sectors employing less than 100 persons in 2015 have been excluded from analysis. The following sectors have therefore been excluded: "Life, medical sciences and research"; and "Waste and recycling"

¹⁴ See Appendix A for sector definitions.

¹⁵ Sectoral groupings for the data in this chart are different to those in Figure 2-28 above. For example, 'Building and construction and real estate' here show a positive growth in employment compared with 'Construction of buildings' in figure 2-28, as they are being boosted by the inclusion of the 'Real estate' sector.

2.4.9 **Growing innovative sectors.** Enfield has a comparative advantage in seven of the sectors identified as having the highest propensity to innovate by the former Department for Business Innovation and Skills (BIS).¹⁶ The SIC codes which comprise those sectors considered to be innovative are set out in Appendix A, section II. As shown in **Figure 2-29**, there are seven industries in Enfield that are identified as potentially innovative, specialised (with a LQ>1) and growing (those in the top right quadrant of 2-29). Among those seven sectors, three are also particularly large employers for Enfield (more than 3,000 employees in 2015): industrial cleaning; building, construction and real estate; and specialist retail. However, three innovative sectors have been declining since 2009 in terms of sectoral employment: financial activities; employment activities; and logistics and transportation (which are also a large employer for Enfield with +3,000 employees).

Summary

2.4.10 Location quotient analysis, which analyses growth and specialisation within a particular industry, and thus providing a relative view of comparative advantage, shows that Enfield has high relative growth in, distribution and warehousing, certain types of manufacturing, and retail, within its ten fastest growing sectors. Enfield also has a number of sectors which are defined as innovative by BIS and are both nationally specialised and locally growing.

2.4.11 BIS's definition of sectors with the highest propensity to innovative highlights North West London and Cambridge as the most innovative sub-regions nationally. Enfield is geographically well placed to benefit further from links with these locations, and future policy and investment could be targeted to support growth in innovative sectors.

¹⁶ Based on 'The distribution of innovation activity across UK industry, Department for Business Innovation and Skills (BIS)'; Adams, Richard, (2011). See Appendix A for SIC listings. Innovative firms are defined as those which ranked highly on a range of assessed innovation-metrics, including level of expenditure on innovation and the percentage of turnover resulting from innovation activities (e.g. new products to market).

2.5 Skills

Introduction

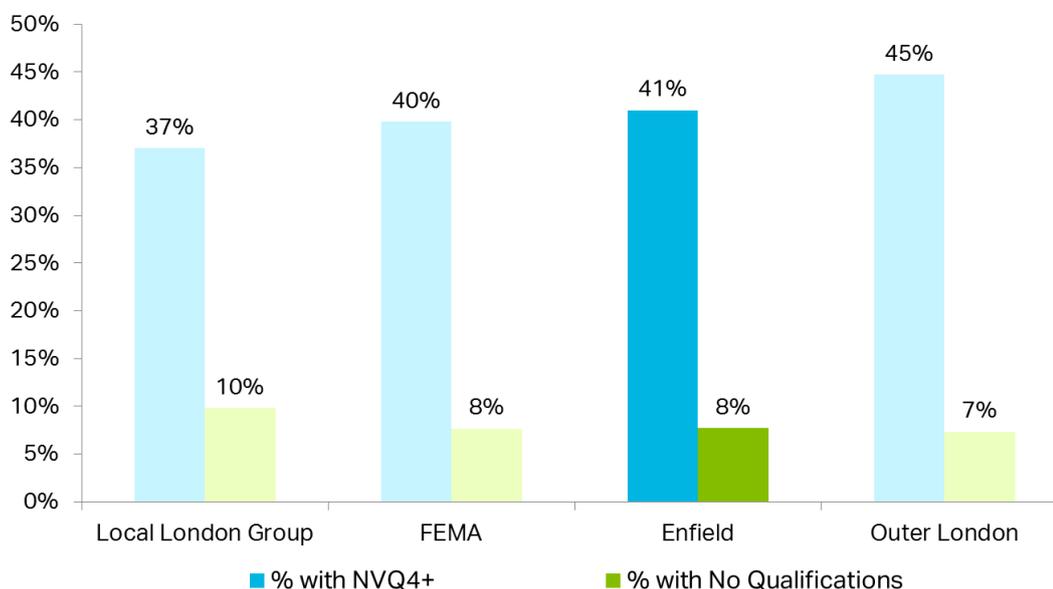
2.5.1 The extent and depth of skills in a local economy acts as a proxy for the employability of the local labour force and its level of human capital. This influences the attractiveness of an area to firms by providing an indicator of the quality of labour supply in an area. The existence of a skilled labour pool among residents in an area is not necessarily related to the level of high-skill, high-GVA jobs in an area. Much labour commutes across borough boundaries, which is especially the case in London, and there is an interrelationship between inner and outer Boroughs as consumers and suppliers of labour.

2.5.2 This section provides an analysis of:

- Residents' level of skills and their correlation with economic variables like unemployment and salaries; and
- Breakdown of occupations by Standard Occupations Classification (SOC) category.

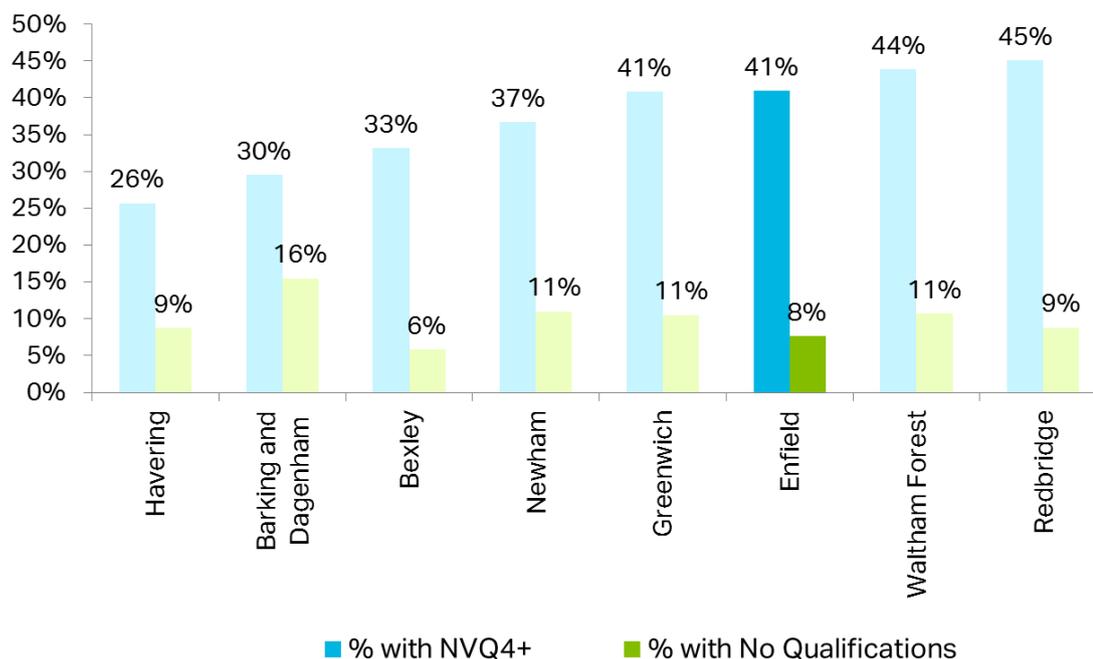
Analysis

Figure 2-30: Proportions of working age population with NVQ+4 and with no qualifications in Enfield and comparator areas, 2015



Source: ONS APS 2016

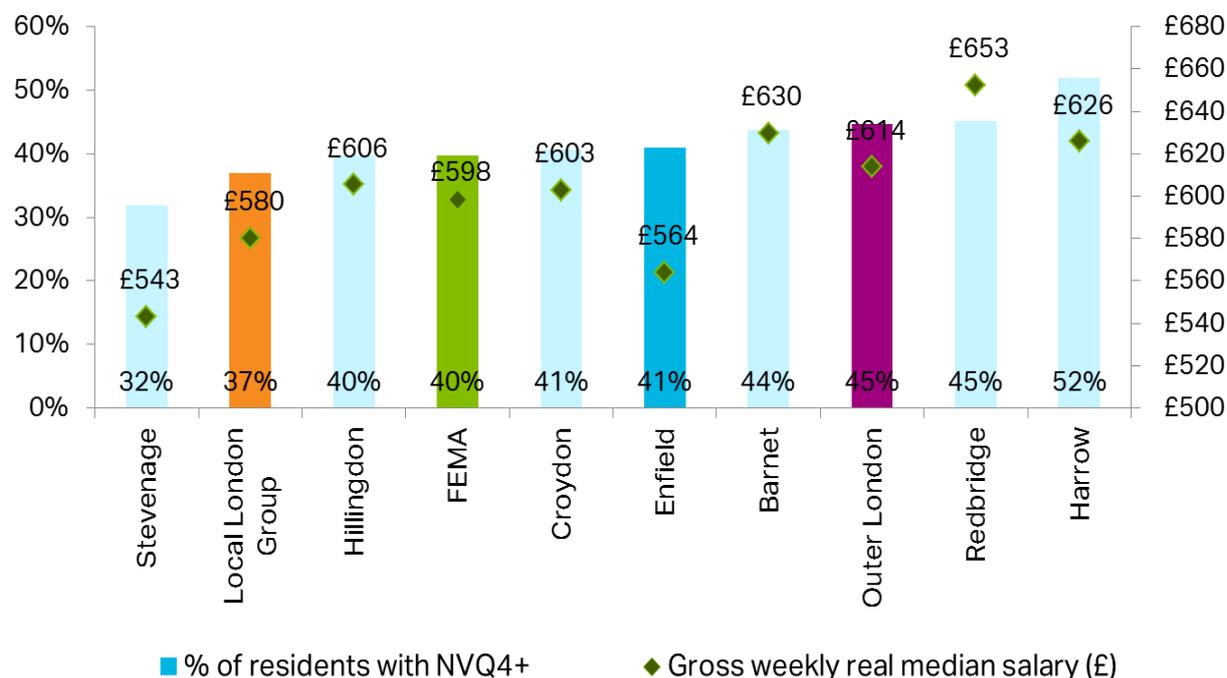
Figure 2-31: NVQ qualifications of the working age population within Enfield and LLG comparator Boroughs, in 2015



Source: ONS APS 2016

2.5.3 Relatively highly skilled resident population. Figure 2-31 shows that at 41%, Enfield has relatively high levels of NVQ+4 skilled (around 86,700 out of a working age population of 211,500). Enfield has a comparatively low level of unskilled working age population at 8% (around 16,900 residents). Within the LLG group, Enfield has the third highest rate of highly skilled residents, and the second lowest rate of residents without qualifications.

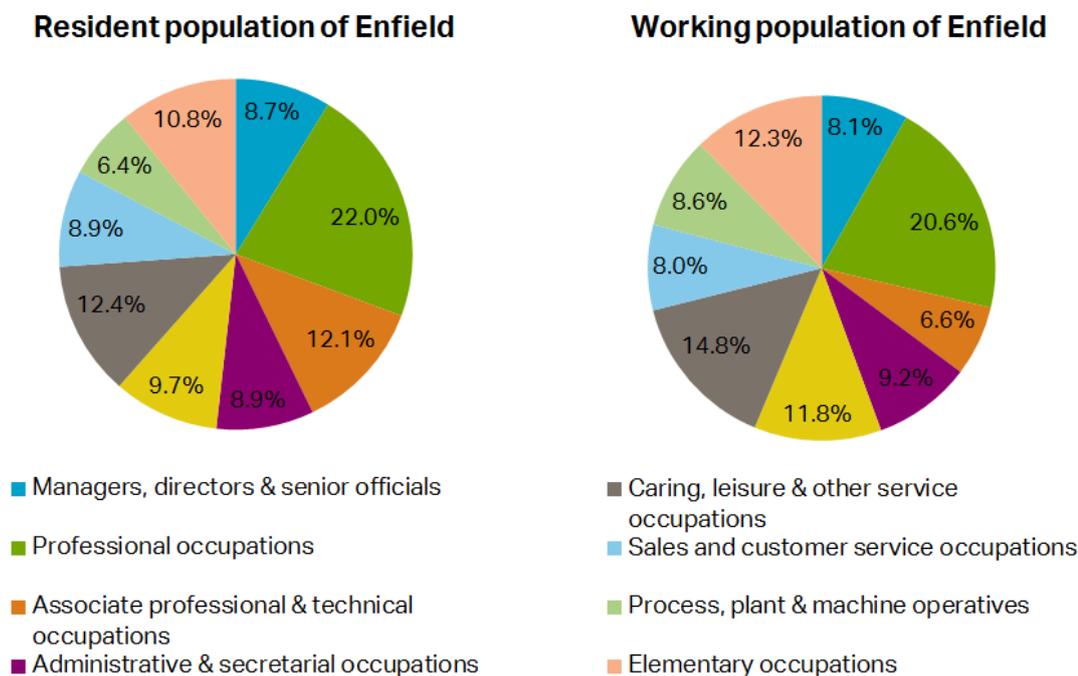
Figure 2-32: Real weekly wages and proportion of population with NVQ4+ in Enfield and comparator areas, in 2015



Source: ONS APS 2016

2.5.4 A salary and skills paradox is apparent with relatively high skills level but low wages. Despite a relatively high level of NVQ4+ residents, **Figure 2-32** above shows that real median salaries of residents in Enfield in 2015 seem to significantly lag behind comparator areas. This phenomenon (high proportion of skilled individual but relatively low higher real pay) could be linked with the high growth of young (under 25 years old) individuals in Enfield’s population (as shown previously in **Figure 2-7**), with students and younger people more likely to be engaged in part-time / agency, low-paid jobs whilst in education or whilst starting their careers.

Figure 2-33: Standard Occupational Classifications (SOC) of the resident population and workforce of Enfield, in 2015



Source: ONS APS 2016

2.5.5 **Different types of jobs for the resident population of Enfield and the workforce population of Enfield.** As shown in **Figure 2-33** above, the resident population of Enfield (i.e. individuals who live in Enfield but may work in Enfield or outside Enfield) exhibits a higher proportion of individuals in managerial, professional and associate professional occupations than the local workforce employed in Enfield-based firms (i.e. individuals whose place of work is in Enfield regardless of where they live). In total, 42.8% of the resident population of Enfield have managerial and professional jobs; compared to 35.3% for the workforce population of Enfield¹⁷.

2.5.6 There are 39,600 managerial, professional and associate professional jobs based in Enfield, but 67,000 residents of Enfield were employed in these jobs. Additionally, there are 13,300 skilled trade jobs (high value, non-professional work) based in Enfield, and 15,100 Enfield residents who do these jobs. These relationships imply that many high-skilled residents commute out of the Borough for work.

Summary

2.5.7 Enfield has a relatively highly skilled population compared to other LLG Boroughs, and a relatively low level of unskilled population. Viewing the composition of jobs worked by residents and jobs available in Enfield we see that there are many more residents of Enfield working in high-skill jobs than there are those kinds of jobs available within Enfield, implying high rates of out-commuting. Compared to

¹⁷ SOC 1 is defined as “Managers, directors & senior officials”; SOC 2 as “Professional occupations”; and SOC 3 as “Associate professional & technical occupations”.

London, Enfield has an under-representation of residents who are managers, professionals and associate professionals, making up just 45.9% of all those in employment compared to 54.5% for London. Conversely, 19.9% of residents undertake caring or sales occupations compared to 14.4% for London.

2.6 Productivity

Introduction

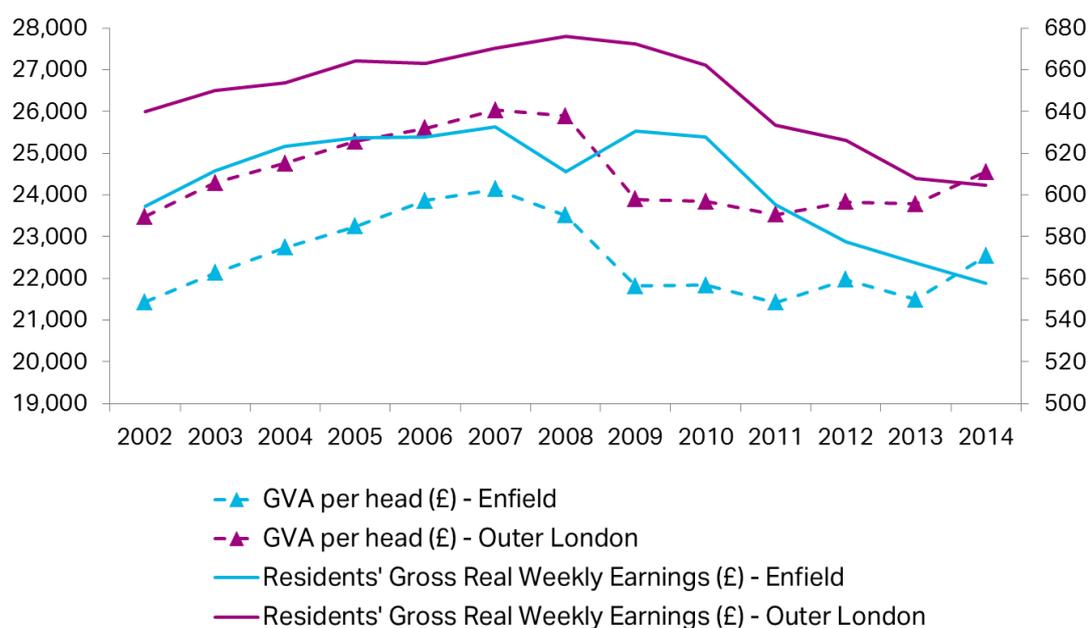
2.6.1 Productivity can be analysed via a range of methods, including GVA, wages, and type of employment available and undertaken. It provides an indication of how effectively labour is being employed within a defined geography. A productivity challenge has existed in the UK since the recession, with real wages and GVA stagnant, despite returns to growth for employment.

2.6.2 This section examines:

- GVA and wages at their current and historic levels
- Self-employment; and
- Public sector employment.

Analysis

Figure 2-34: GVA and real wages change in Enfield and Outer London.



Source: ONS APS 2016

2.6.3 **Enfield has below average productivity which is only recently starting to rise after a period of stagnation.** Figure 2-34 shows that productivity in terms of GVA per head in Enfield declined significantly post 2007 with no substantial upturn until 2013-2014. In Enfield, GVA per head is still below pre-recession levels and lags Outer London average.

2.6.4 **Real wages remain lower than 12 years ago.** Figure 2-34 also shows that real wages in Enfield are still below 2002 levels and below Outer London averages and have yet to show signs of recovery since the recession. This could be due to a

number of factors including an increase in part-time working, zero hours contracts and a freeze on pay leading to the erosion of real wages over time due to inflation.

Figure 2-35: Share of residents in employment being self-employed in Enfield and comparator areas, in 2015¹⁸



Source: ONS APS 2016

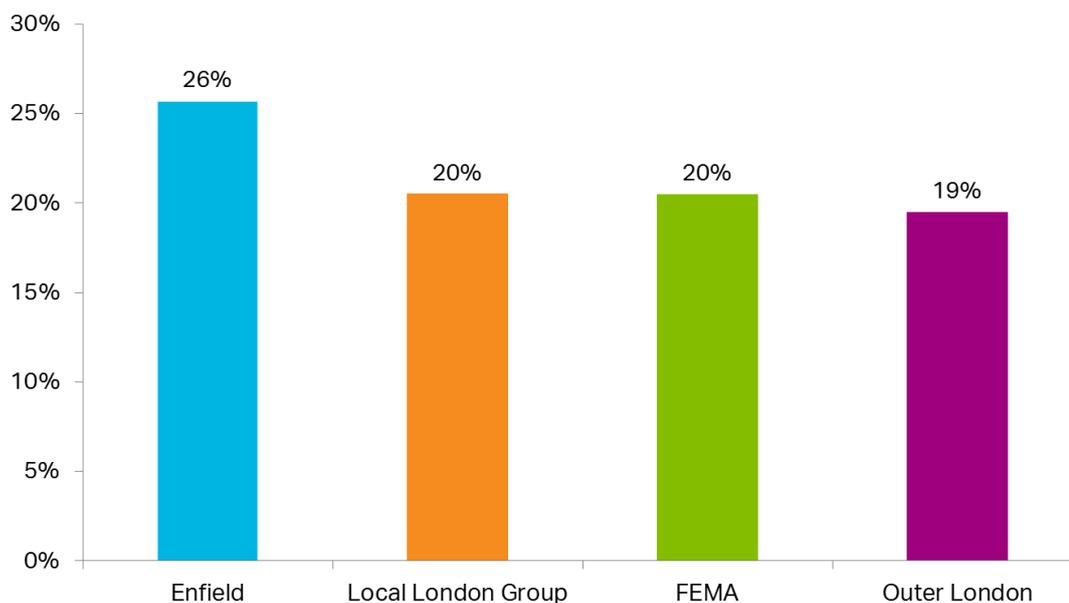
2.6.5 High levels of self-employment. Figure 2-35 above shows that self-employment in Enfield represents 22.5% of all residents in employment in 2015, compared to 17.8% for Outer London. This high self-employment level could imply a large amount of precarious and low-value forms of working such as zero-hours contracts, agency contracting, Uber-type on-demand jobs, or other similar forms of work. The growth in these forms of employment are likely to have various impacts on the labour profile of the economy, including high rates of part-time working and lower salaries^{19 20}. This phenomenon could potentially partly explain Enfield’s salary and skills discrepancy noticed in Figure 2-32 and could be a factor explaining the stagnation in real wages and GVA shown in Figure 2-34.

¹⁸ Self-employment data is based on survey data of respondents’ own-assessment of their employment status.

¹⁹ According to the Financial Time, zero hours contracts increased by a fifth during 2015 and 2016, and now represent almost 3% of all UK employees, O’Connor.S, (6th September 2016); UK workers on zero hours contracts increase by a fifth, Financial Time.)

²⁰ Agency workers, when paid directly from the agency’s payroll, are not included in the BRES data, therefore do not appear in the previous analysis..

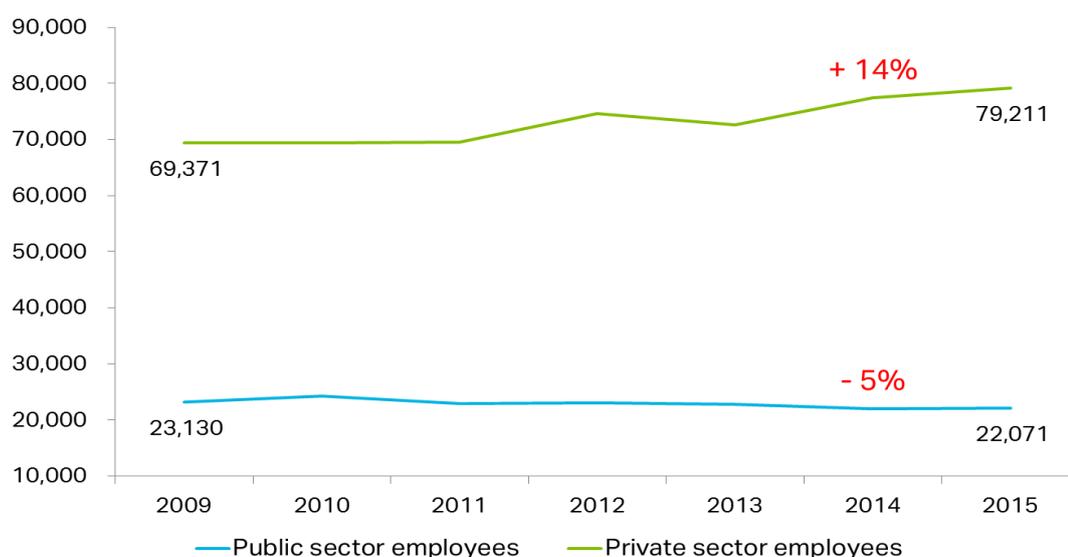
Figure 2-36: Proportion of Enfield residents employed in the public sector in 2015 in relation to comparator areas.



Source: ONS APS 2016

2.6.6 A high dependence on a declining public sector, but a growing private sector. **Figure 2-36** above, shows that at 26% of all jobs undertaken by Enfield residents, there is a higher dependence on public sector employment than in comparator areas. As such, employment rates could be vulnerable to any future reduction in the size of the public sector. This can be expected in the forthcoming years following the trend described below in **Figure 2-37**, which shows the growth and decline in private and public sector jobs in Enfield respectively. In particular, jobs in sectors such as education and public administration appear particularly at risk, as shown in **Figure 2-17** and **Figure 2-22**. Despite losses in the public sector, as **Figure 2-37** shows, private sector job creation on the whole has been strong since 2009.

Figure 2-37: Employee growth in the public and private sectors in Enfield



Source: BRES 2016

Summary

- 2.6.7 Enfield differs from comparator areas in terms of real average wages, which are significantly below the level which might be expected from the skills level of its resident workforce. This is despite the fact that we know that a large number of residents are commuting to high-skill, high-pay jobs outside of Enfield, and implies a low level of productivity for many jobs found within Enfield.
- 2.6.8 In particular, Enfield has a high proportion of residents engaged in part-time work (discussed in Section 2.7 below), a high number of workers engaged in public sector jobs, and a high proportion of self-employed workers. All three of these factors can potentially provide an insight into low productivity and low wages of jobs within Enfield.
- 2.6.9 Enfield has a relatively young population, with a high number of jobs in occupations like retail which can be correlated with low wage and low productivity of workers at the start of their careers. This is not a negative outcome in itself if these workers are to go and develop skills and experience and become more productive in the future.

2.7 Economic Inclusion

Introduction

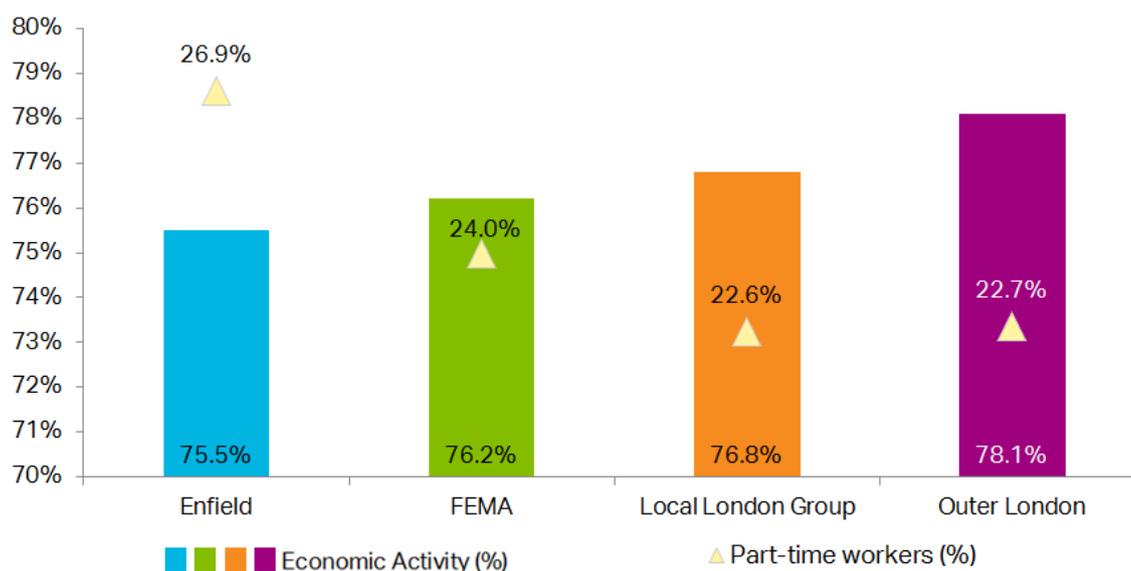
2.7.1 Through analysing economic activity and disparities in incomes and skills by geography within Enfield, it is possible to build a picture of a relationship between the geographic location of residence and work and life outcomes for individuals. Economic inclusion is an important metric as it provides an indicator of how likely individuals are to contribute to the economic success of an area, both in terms of the supply of high-quality labour to the workforce, and in terms of consumption and investment demand.

2.7.2 This section examines:

- Economic indicators such as part-time working, unemployment and salaries
- Index of Multiple Deprivation (IMD) and breakdown of some of the 2015 IMD components, including health, income and skills deprivation; and
- Economic inactivity and its causes.

Analysis

Figure 2-38: Employed residents in part-time employment and economic activity rate in Enfield and comparator areas, in 2015

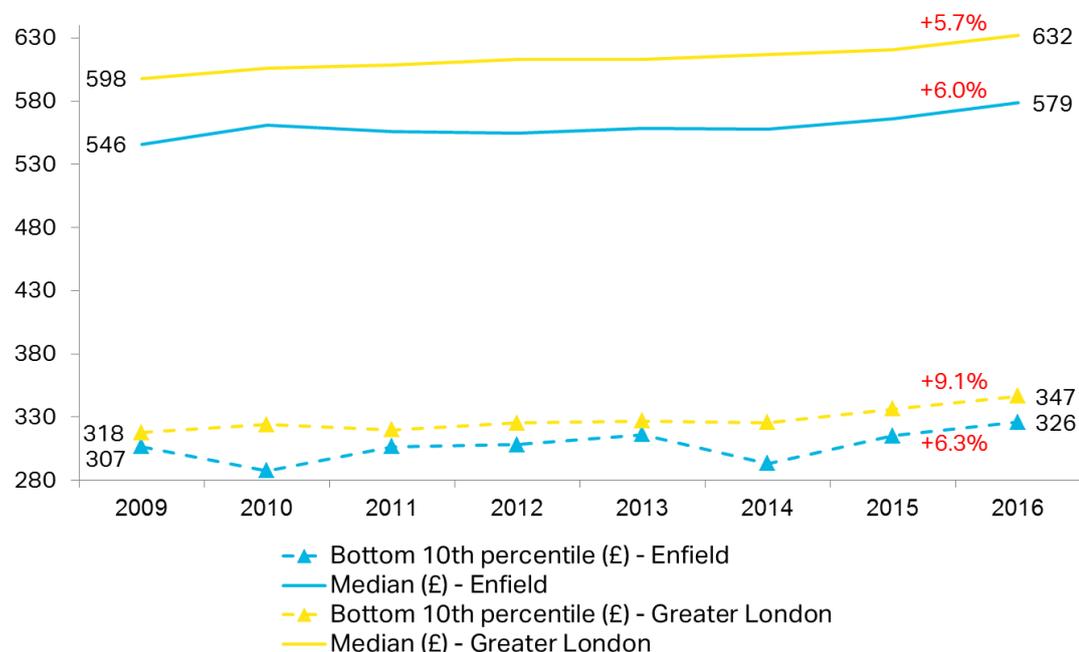


Source: ONS APS 2106

2.7.3 **High levels of part time working.** Figure 2-38 shows that Enfield had a relatively low rate of economic activity (75.5% compared to 78.1% for Outer London) in 2015 and a relatively high rate of part-time employment, with nearly 27% of all working residents in part-time jobs. Levels of part-time working can be linked to

trends such as the rise of agency work and zero hour contracts but also the propensity of young adults to undertake part-time jobs whilst still in education.

Figure 2-39: Residents' gross weekly pay change in Enfield and Greater London, for full-time workers

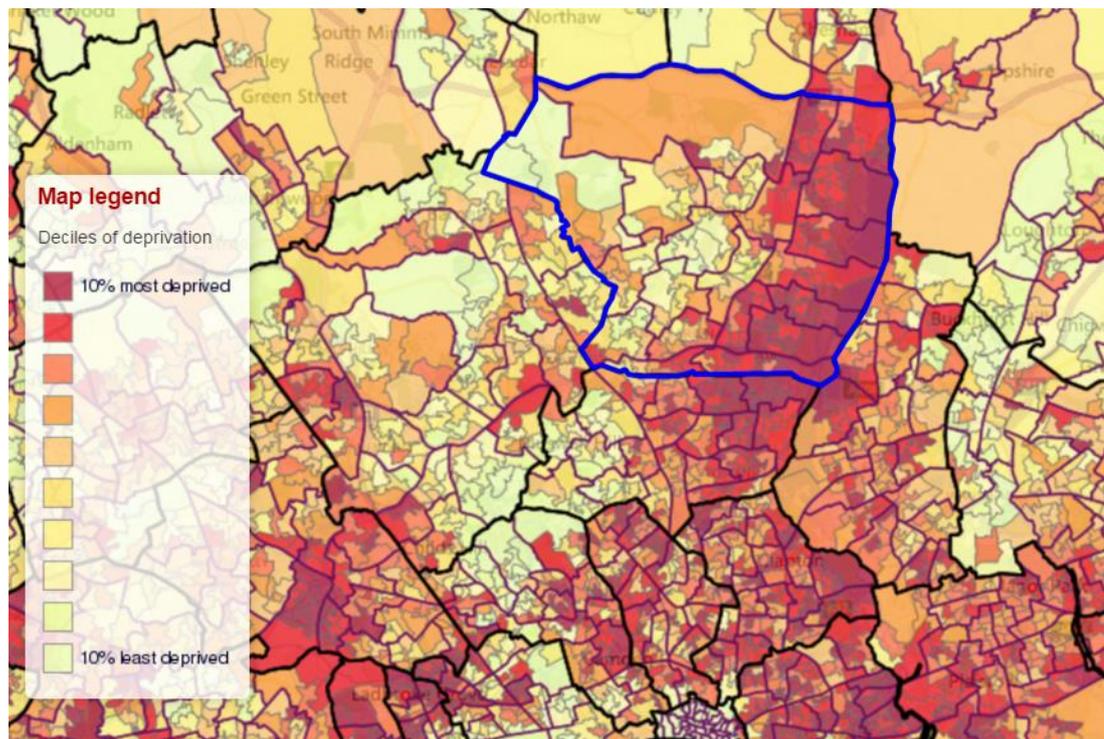


Source: ONS Annual survey of hours and earnings – resident analysis 2016

2.7.1 Low real salaries. In absolute terms, though the full-time workers' median real salary level in Enfield followed a similar growth trend to that of Greater London (respectively +6.0% and +5.7% since 2009), Enfield's residents median gross weekly pay in 2016 was still 8.4% lower than the Greater London average.²¹

²¹ The tendency and level of the median gross weekly pay of full-time employees is very close to the one of all employees; therefore the above analysis equally applies for all employed people in Enfield.

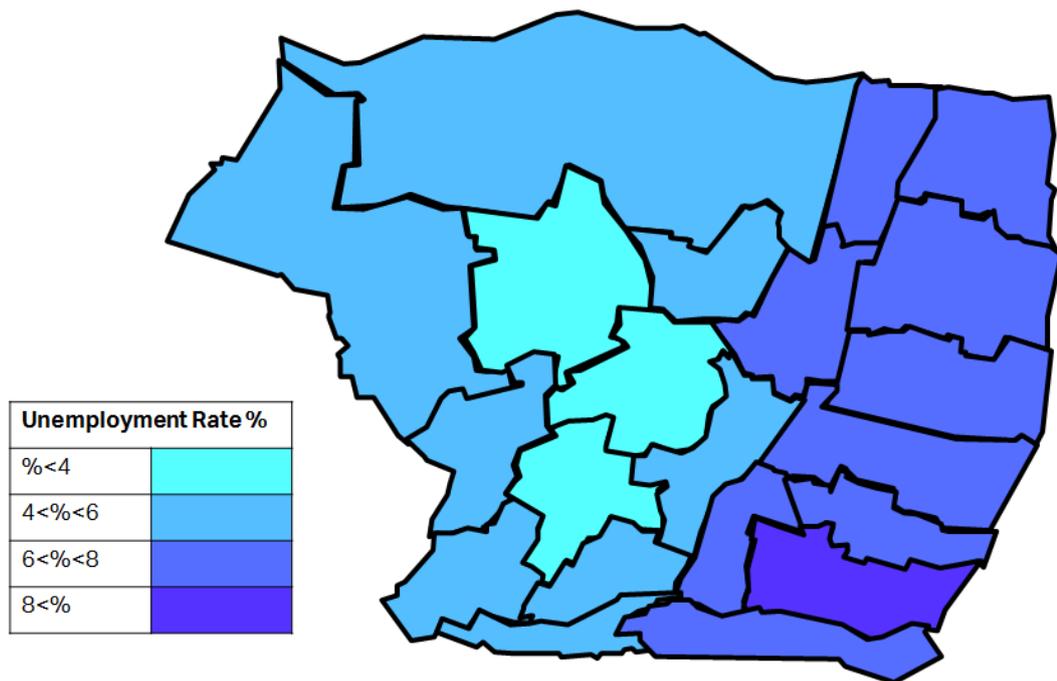
Figure 2-40: Income deprivation, 2015 Indices of Multiple Deprivation (IMD) by Lower Layer Super Output Area (LSOA)



Source: DCLG 2016

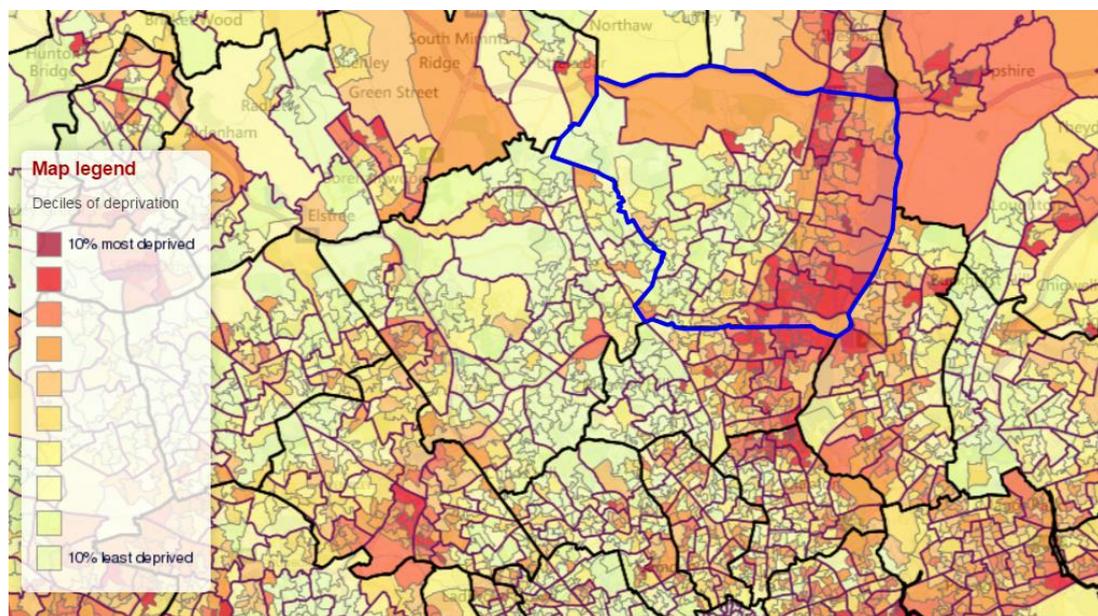
2.7.2 **Geographically distinct income inequalities.** As shown in **Figure 2-40**, income deprivation scores as registered by the 2015 IMD index were significantly higher in the Eastern side of the Borough, where a large concentration of LSOAs ranked among the 10% most nationally deprived areas are located.

Figure 2-41: Unemployment rate in Enfield by ward, in 2011



Source: ONS APS 2016

Figure 2-42: Skills deprivation, 2015 Indices of Multiple Deprivation (IMD) by LSOA

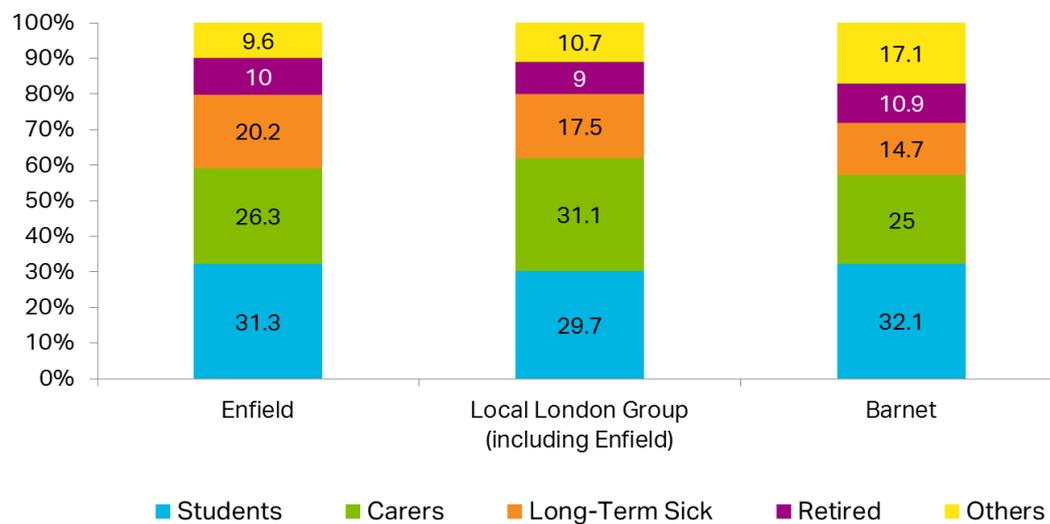


Source: DCLG 2016

2.7.3 **A clear East-West prosperity split.** Additionally, as shown in **Figure 2-41** above, the Eastern Corridor in Enfield, encompassing Edmonton and its surroundings exhibits significantly higher unemployment than many areas east of the A10. Edmonton Green had the highest unemployment rate in the Borough at the time of the 2011 Census with an unemployment rate of 8.8%. The Highlands, Grange and Winchmore Hill Boroughs all had unemployment rates below 4%. The same

geographical pattern is also shown in **Figure 2-42** for skills deprivation inequalities.

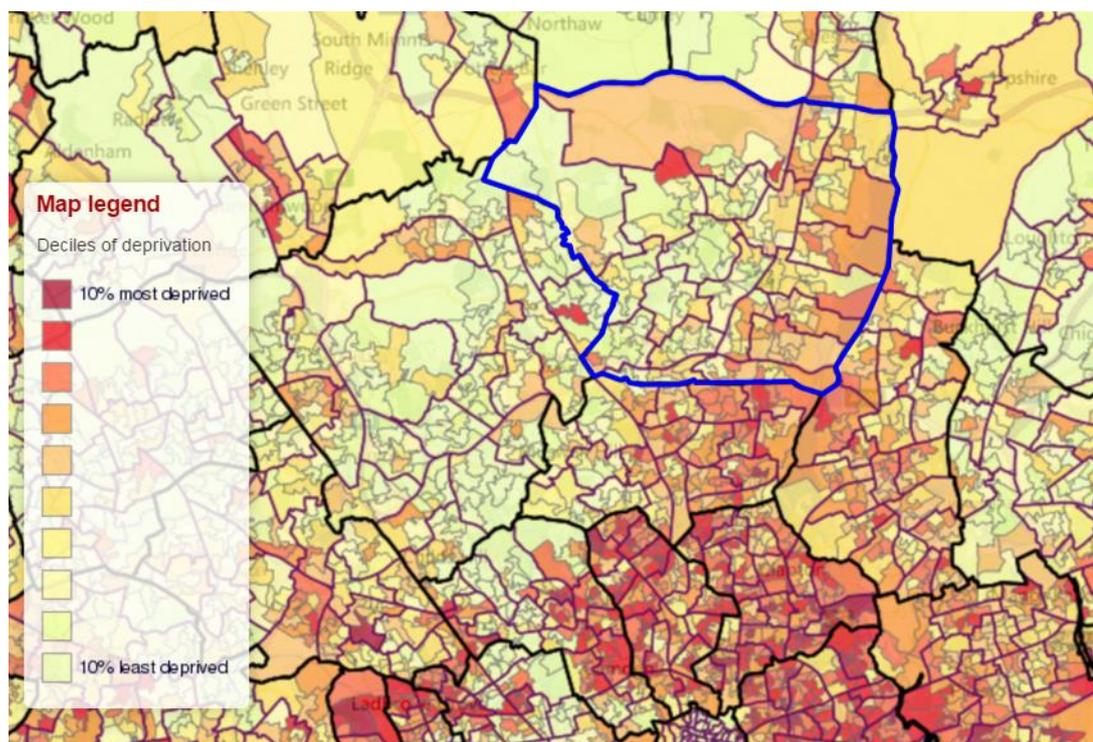
Figure 2-43: Residents' economic inactivity breakdown in Enfield and comparator areas, 2015



Source: ONS APS 2016. Note: Figures may not add to 100: due to the low analysis level, some sensitive data were inaccessible and could not be added to the analysis, including the 'temporary sick' and 'discouraged' categories.

2.7.4 A relatively high share of Long-Term Sick residents. As shown in **Figure 2-43** above, Enfield's proportion of long-term sick residents among the working-age inactive was 20.2%, a rate slightly above that for one the LLG or and its neighbour Barnet. A high rate of long-term sick can translate into long-term unemployment issues.

Figure 2-44: Health deprivation, 2015 Indices of Multiple Deprivation (IMD) by LSOA²²



Source: DCLG 2016

2.7.5 **A relatively low level of health deprivation.** The East-West split observed for other deprivation variables such as income (**Figure 2-40**) or skills (**Figure 2-42**) is apparent but less prevalent in terms of health deprivation as measured by the 2015 IMD index.

Summary

2.7.6 Geographically within Enfield, income deprivation, unemployment and skills deprivation are all correlated and most prevalent in the east of the Borough. An analysis of the causes of economic inactivity shows high rates of long-term sick, which is also considered a proxy for long-term unemployment.

2.7.7 Stagnant real wages and high levels of part-time working are possible warning signs of problems with in-work poverty. Precarious forms of self-employment, such as zero hours contracts can also be symptomatic of this and are prevalent in sectors which are large employers in Enfield, like health and social care.

²² The health deprivation index measures the risk of premature death and the levels of poor physical and mental health.

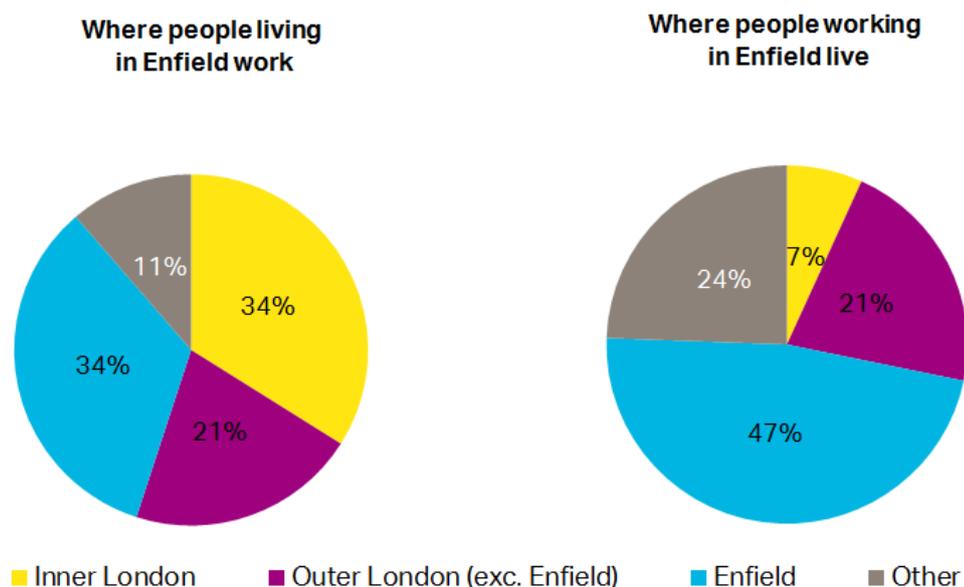
2.8 Linkages and Flows

Introduction

- 2.8.1 As previously discussed (**Figure 2-33**), the economy of Enfield is split between those who work in Enfield (and may reside in Enfield or elsewhere) and those who reside in Enfield but work elsewhere. Therefore, there is a difference between the workplace jobs undertaken in Enfield and the jobs undertaken by Enfield residents inside and outside the Borough.
- 2.8.2 An understanding of this relationship enables us to understand Enfield's economic potential, including how individuals and firms value land within the Borough. By viewing this relationship in conjunction with travel patterns, we can attempt to see how connectivity influences the types of jobs and economic activities that occur within an area, by defining its relationship with its wider economic area.
- 2.8.3 This section examines:
- Travel to work patterns in and from Enfield; and
 - Distance travelled to work and use of public transport.

Analysis

Figure 2-45: Travel to work patterns in Enfield and London, in 2011

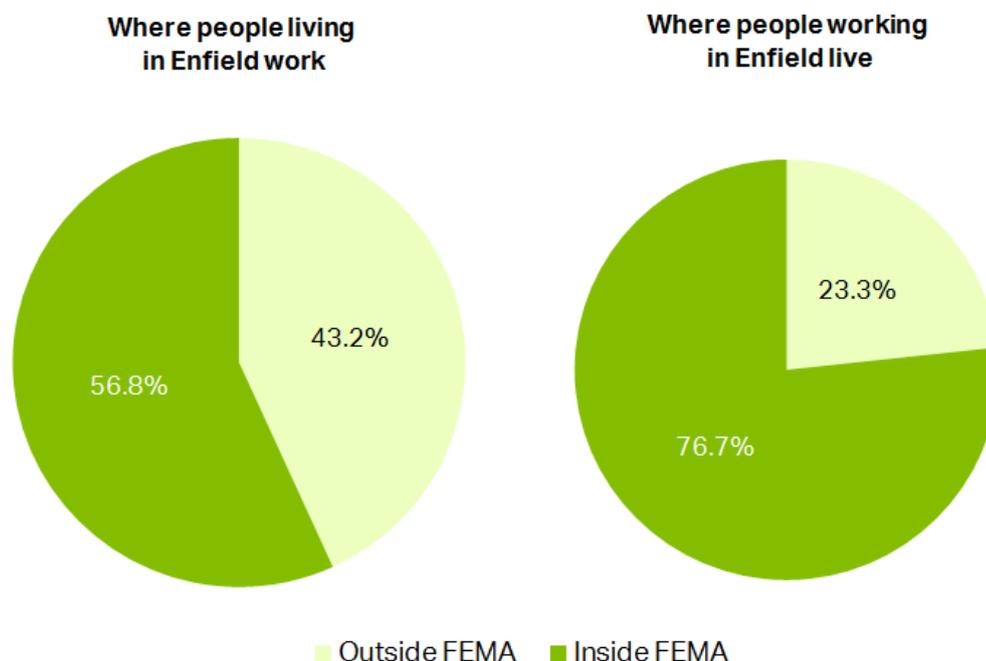


Source: Census 2011

- 2.8.4 **Strong commuting flows to Central London.** Figure 2-45 shows that just over one third of Enfield residents commute to Inner London for work, one third work locally and one fifth work in Outer London.

2.8.5 **More local labour supply for workplace jobs in Enfield.** Figure 2-45 also shows that the Enfield local economy draws its workforce mainly from local residents (about one half), from Outside London (one quarter) and from Outer London (one fifth)

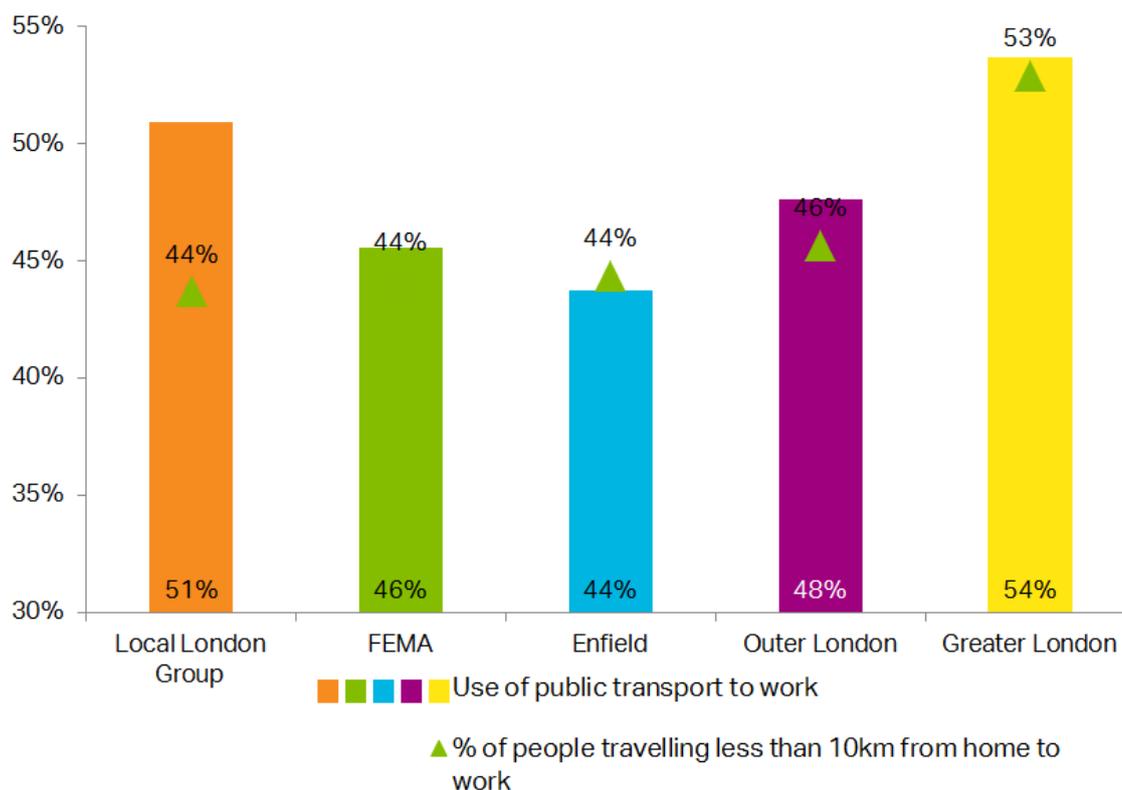
Figure 2-46: Travel to work patterns in Enfield and its FEMA, 2011



Source: Census 2011

2.8.6 **A FEMA that supplies a large proportion of the workforce for jobs undertaken in Enfield, but a lot of Enfield’s own labour supply goes outside the FEMA.** Figure 2-46 shows that Enfield has a high proportion of out-commuting into Central London. As a consequence of this, the FEMA (which doesn’t include Central London for the purposes of this report) appears to be more relevant for the workforce of Enfield rather than the working population of Enfield. That is to say, the FEMA supplies a large proportion of the labour for jobs undertaken in Enfield, but Enfield itself proportionally supplies a lot of labour outside the FEMA.

Figure 2-47: Distance travelled to work and rate of public transport use in Enfield and comparator areas, 2011



Source: Census 2011

2.8.7 **A slightly lower use of public transport than comparator areas.** Figure 2-47 shows that about 44% of Enfield residents travelled less than 10km to work in 2011, in line with the FEMA, Outer London and LLG levels. However, use of public transport appears to be relatively low compared to these areas, which could be linked to the fairly low number of jobs accessible by mass public transport within 45min over the borough surface, as shown in Figure 2-27, as well as good access to the strategic road network, including the A10 and M25.

Summary

2.8.8 There are high rates of commuting from Enfield to jobs in Central London, with around a third of Enfield residents making this daily commute. However, many of the jobs done within Enfield are drawn from local labour supply. Generally, residents of Enfield are currently less likely to use public transport than in comparator areas, although investment to public transport and scheme such as Cycle Enfield is likely to change this.

2.9 Environment

Introduction

2.9.1 Environmental factors help determine place quality, which can impact the demand of workers and firms to locate within an area. They can also influence economic output through its impact on drivers of health levels such as obesity and pollution. Poor health reduces the supply of labour and productivity.

2.9.2 This section presents analysis on:

- Vehicular traffic and CO₂ emissions
- Living environment indicators, including open space surface and 2015 IMD analysis on living environment deprivation; and
- Health indicators, including asthma and obesity rates.

Analysis

Figure 2-48: Annual motor vehicle traffic and CO₂ emissions per capita in Enfield and comparator areas, in 2015



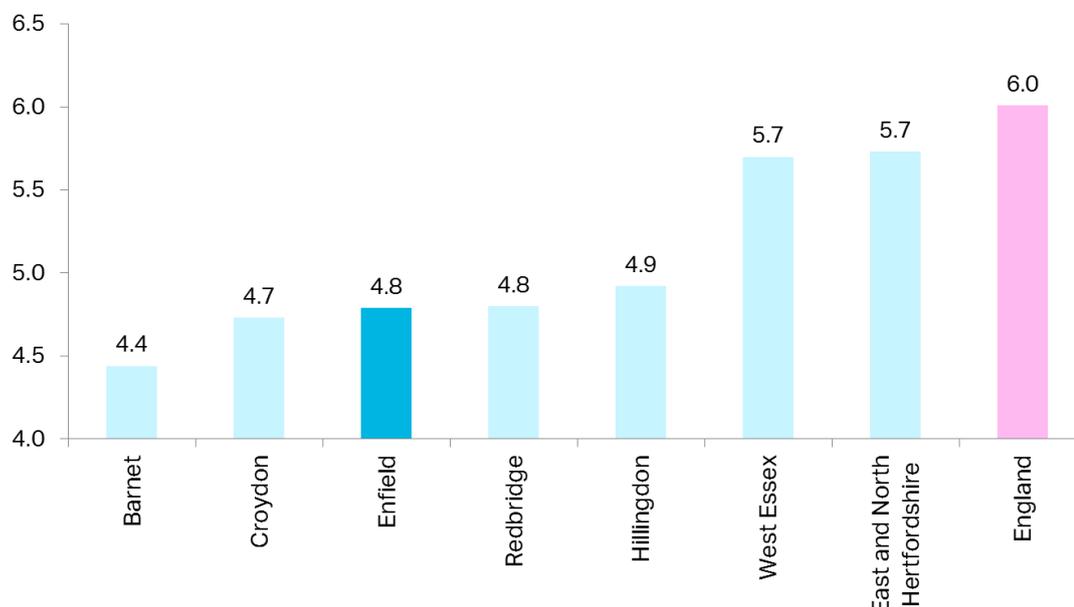
Source: Department of Energy and Climate Change 2016; Department for Transport 2016

2.9.3 **Enfield has high traffic levels²³.** Figure 2-48 shows that Enfield has a high level of motor vehicle kilometres driven per person per annum. This is correlated with relatively low levels of public transport use (shown above in Figure 2-47) and the relatively poor east-west linkages. Despite this, CO₂ levels (also shown in 2-49 above) are in line with London averages, although London does have a recognised

²³ 'Traffic' refers to the amount of vehicular traffic on roads (not the average speed at which traffic moves).

air quality problem. The high motor vehicle usage indicator may also be related to the high growth rate for road-dependent industries, such as food manufacturing, distribution, and logistics.

Figure 2-49: Prevalence of asthma in Enfield Clinical Commissioning Group (CCG) jurisdiction and CCG comparator areas, in 2016

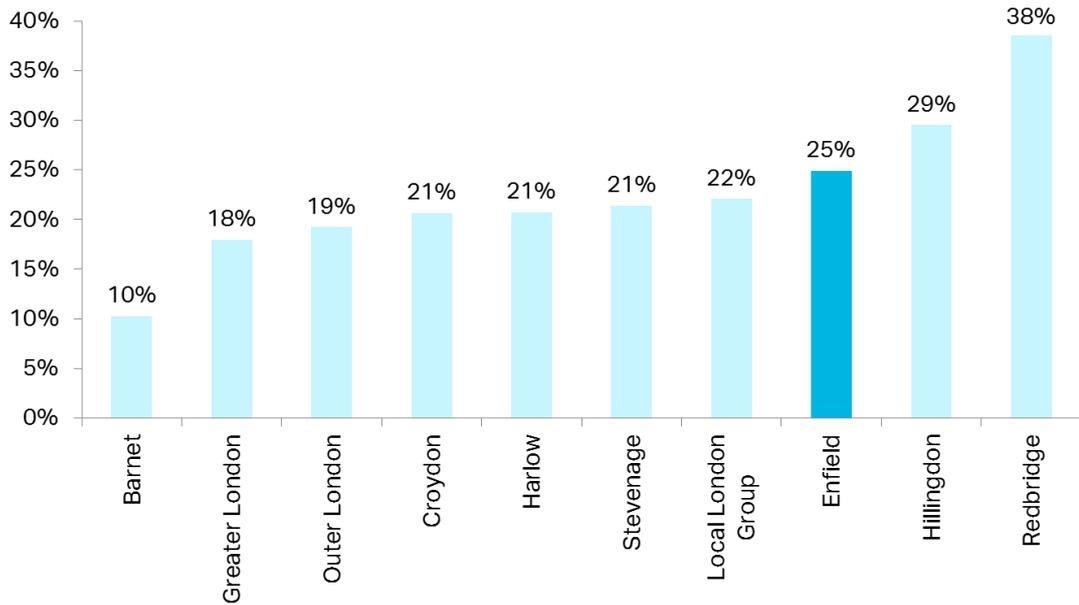


Source: Asthma UK 2016. Note: West Essex is the associated CCG for Harlow; and East and North Hertfordshire the associated CCG for Stevenage

2.9.4 A low asthma rate. Despite the high level of motor vehicle traffic shown in **Figure 2-49**, Enfield has a rate of asthma prevalence which is below the national average, and similar to other comparable Outer London boroughs. This can be possibly linked with its relatively high share of surface covered by publicly accessible open spaces (25%), compared to an average of 18% in Inner London and 19% in Outer London, as shown in **Figure 2-50** below.

As an outer London borough, Enfield includes large areas of Green Belt, combined with Metropolitan Open Land (MOL), both of which act to preserve amenity space. However, to benefit from this open space good quality access is required. Access could be considerably improved and large areas are considered to be underutilised. There is also a disparity of access across the borough with large areas of open space in the west and poor access to open space in the east, which is highly populated and relatively more deprived.

Figure 2-50: Percentage of publicly accessible open space as a proportion of total surface area, in Enfield and comparator areas²⁴



Source: latest data available through local plans, open space strategies or any other public document made available by the borough. Private open space and green belt areas have been excluded from the count.

2.9.5 High level of obesity. Enfield’s obesity rate is 3 percentage points higher than that of Outer London’s in 2015, as shown in **Figure 2-51** below. Obesity can be a cause of health problems which can damage overall local productivity, and could explain the high long-term sick rates.

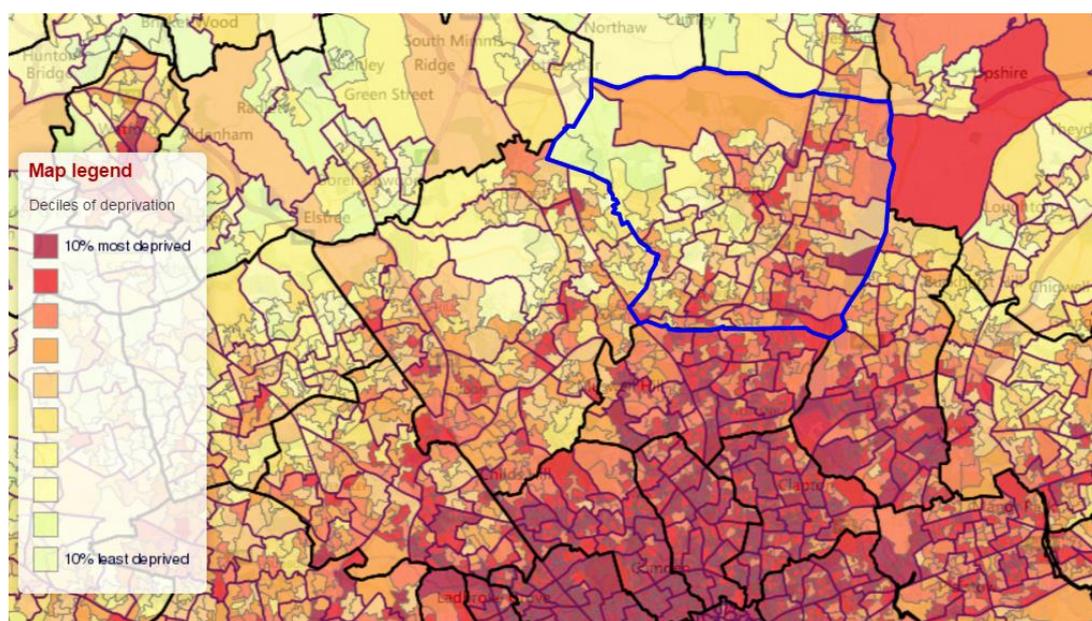
Figure 2-51: Prevalence of obesity in Enfield and comparator areas, in 2015



Source: Public Health England 2016

²⁴ Green belt and private open spaces and amenities are not included in this ratio. Therefore the figures represents the share of open space within the borough which is publicly accessible, but not the overall share of green or non-urbanised space (which will tend to be much higher for Outer London borough having large areas of Green Belt within their territory).

Figure 2-52: Living environment deprivation, 2015 Indices of Multiple Deprivation (IMD) by LSOA²⁵



Source: DCLG 2016

2.9.6 **A relatively low level of environmental deprivation.** Figure 2-52 shows that, related to the open space data shown in Figure 2-50, Enfield is the 23rd (of 33) most deprived Borough of London in terms of environmental quality, as measured by the 2015 IMD index. This ranking could be expected to improve further upon completion of ongoing public estate renewal programmes.

Summary

2.9.7 Enfield has relatively high levels of obesity but green space is fairly well provided for in the Borough. Enfield has high levels of motor vehicle usage per resident and low usage of public transport. High traffic levels could also be related to growth in industries with logistics-inputs requirements as noted above, and could be a reflection of good road infrastructure in Enfield.

²⁵ The living environment deprivation index measures both the quality of the indoor (quality of housing) and of the outdoor (air quality and road traffic casualties) environments

2.10 Housing and Planning

Introduction

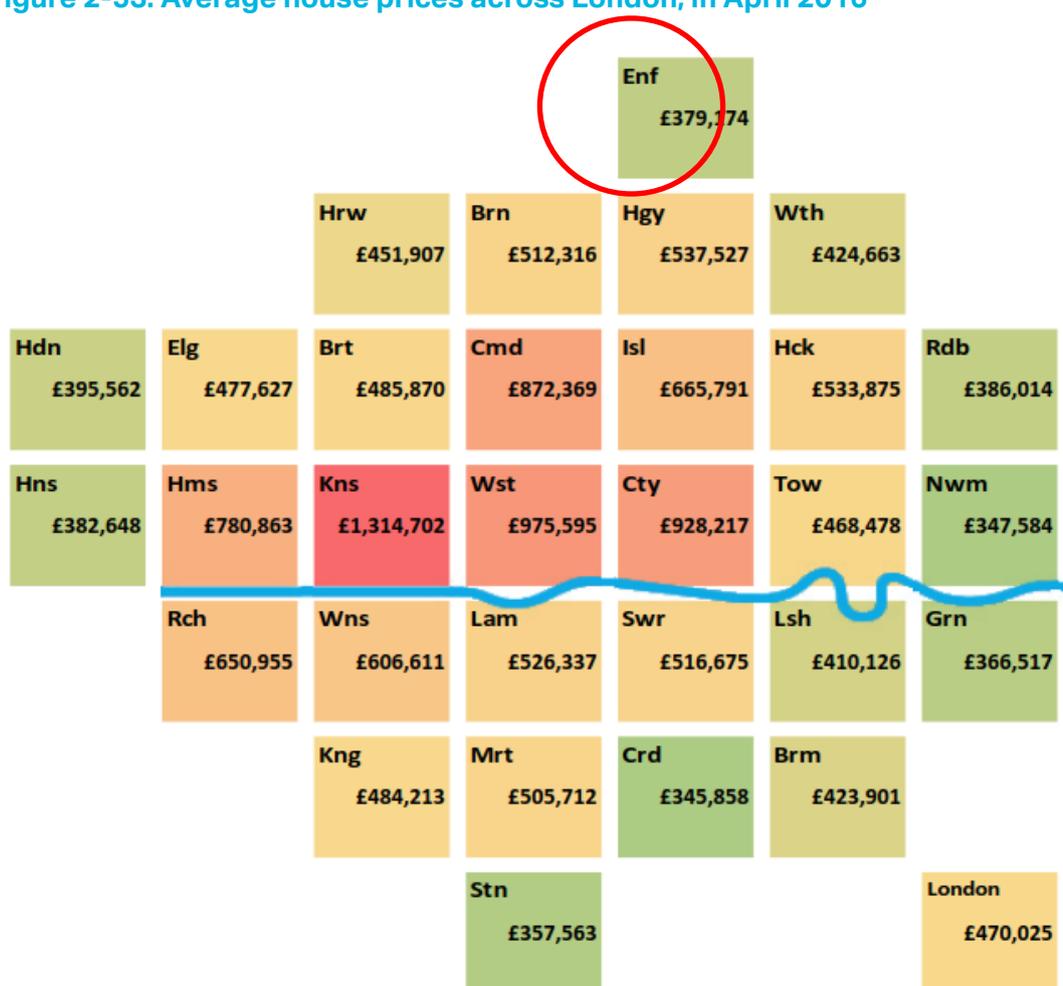
2.10.1 This section seeks to provide an understanding of land use within the Borough, The amount of housing delivered within an area is one determinant of local house prices, which in turn affects the affordability of an area. This impacts the disposable income available to residents of an area. The demand for labour to locate within an area is partly based on such affordability criteria, which will in turn affect the demand for firms to locate there.

2.10.2 This section examines:

- House prices and affordability;
- House building rate, at current and historic levels; and
- Affordable house building rate.

Analysis

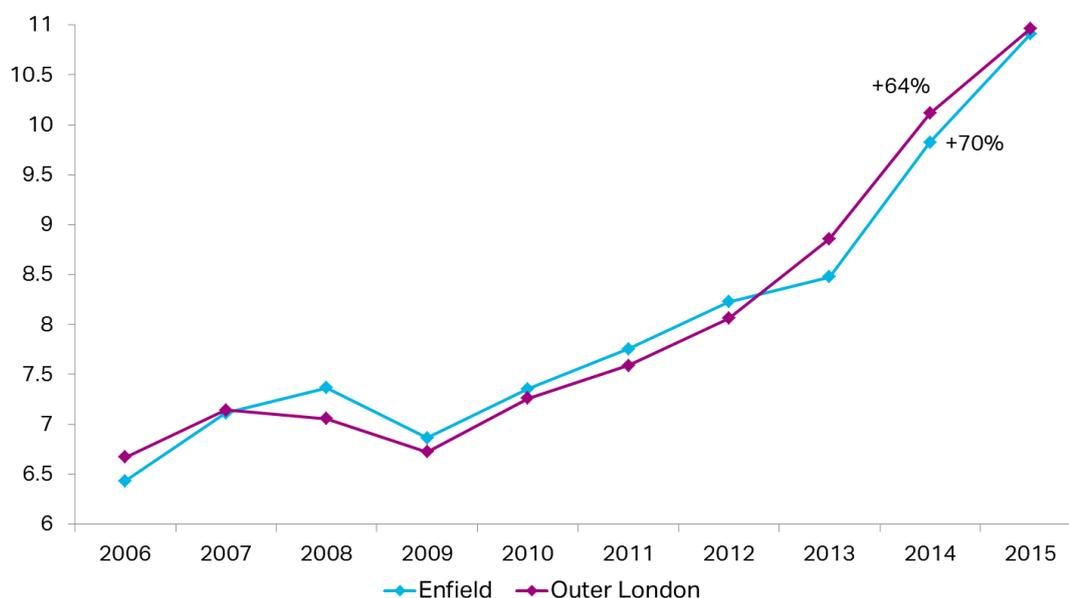
Figure 2-53: Average house prices across London, in April 2016



Source: GLA, (2016); Economic Evidence Base for London 2016, GLA Economics

2.10.3 Increasing house prices in Enfield. In absolute terms, residential property market values have increased significantly across all London Boroughs and neighbouring counties since the recession. In Enfield, the median house price rose by 30% between 2012 and 2015, at an average annual increase growth of 9%. This is in line with the Greater London and Outer London’s median housing price increase, which amounts to 33% for the period 2012-2015. **Figure 2-53** shows that the average house price in Enfield in April 2016 was £379,174. The increase in house prices in Inner London has been a driver of demand for housing in Outer London areas as individuals seek more affordable locations. Some London boroughs have bought and leased homes in Enfield to meet the needs of people they have to place in temporary accommodation, which has added to this demand for homes.

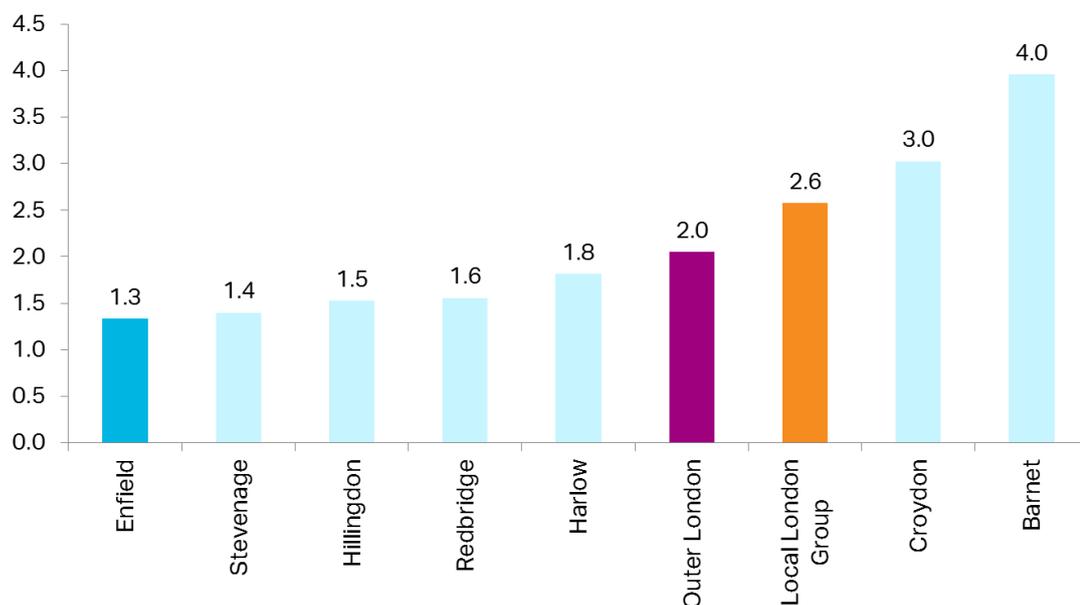
Figure 2-54: Ratio of median house prices to gross annual median earnings in Enfield and Outer London



Source: ONS APS 2016; DCLG 2016

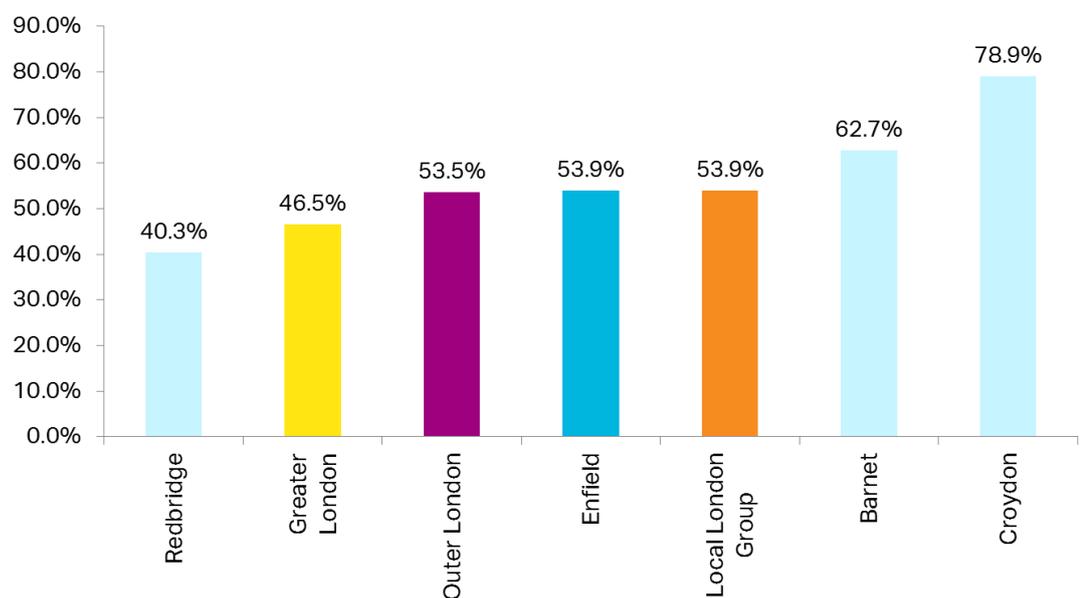
2.10.4 Increasingly unaffordable housing. In common with London, over the last decade house prices have risen faster than earnings. This generates affordability issues, exacerbated by the insufficient number of housing completions in London compared to current needs. **Figure 2-54** above shows how the ratio of annual earnings to house prices has increased rapidly from around 6.5 in 2006 to over 10.5 by 2015. Affordability issues will act as a constraint on the attractiveness of London as a place to live, and could over time, were trends to continue, threaten the attraction and retention of talent and economic productivity.

Figure 2-55: Average annual rates of housebuilding per 1,000 residents in Enfield and comparator areas and boroughs, between 2012 and 2016



Source: DCLG 2016; ONS Census Mid-Year Population Estimates

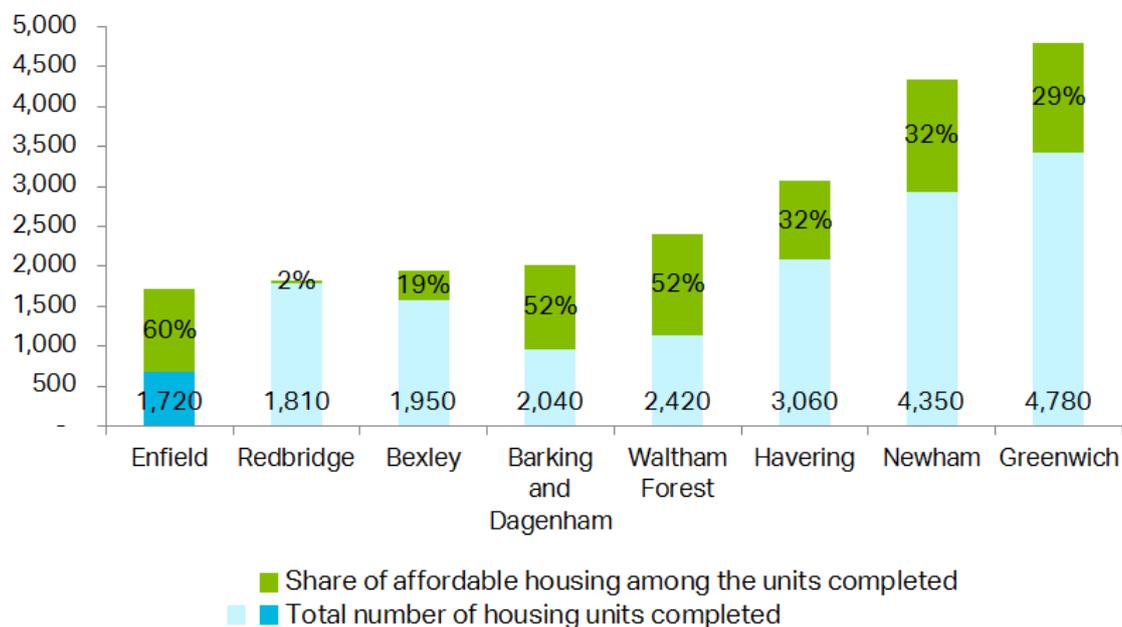
Figure 2-56: Average annual housing delivery by borough between 2012 and 2016, compared to the London Plan 2016 annual targets (2015-2025)



Source: DCLG 2016; GLA 2016

2.10.5 Good progress on house building targets. While Enfield has a relatively low rate of house building per capita (just 1.3 units per 1000 residents) than comparator areas, as shown in **Figure 2-55**, its current rate of housebuilding compared to the 2016 London Plan targets is in line with the average rates of the FEMA and Outer London (as shown in **Figure 2-56**).

Figure 2-57: Absolute number of housing completions and rate of affordable house building, Enfield and comparator areas, between 2012 and 2016



Source: DCLG 2016

2.10.6 **Increasing the affordable housing stock.** Enfield has also been successful in increasing affordable housing which accounts for 60% of all new housing completions between 2012 and 2016, the highest of any LLG comparator Borough.

2.10.7 This substantial share of completed affordable housing is in line with the recent 2016 London Plan recommendations in terms of tenure mix, and is mainly explained by the recent large-scale estate renewal happening throughout the borough²⁶.

Summary

2.10.8 Enfield completes a relatively low number of houses per annum compared to some comparator areas, however it also has relatively low London Plan housing targets. Much in line with broader challenges in Greater London and its surrounding areas, house prices have increased rapidly relative to earnings in recent years in Enfield, and this will impact affordability, quality of life, and the ability of individuals to consume and invest.

2.10.9 Major new housing projects being delivered such as New Ladderswood and those proposed, such as Meridian Water, will help improve the housing supply situation. However, the requirement for affordable housing remains. A sectoral breakdown of earnings by industry relative to house prices would provide greater understanding

²⁶ This estate renewal, supported by Enfield Council, includes schemes such as Labberswood, Highmead; or various other smaller sites.

of affordability in Enfield for different categories of workers.

3. Conclusion

- 3.1.1 This report has provided a profile of the local economy which can serve as an evidence base for planning for economic growth, regeneration and socio-economic inclusion for LB Enfield's residents. It has focussed on identifying and presenting trends in key socio-economic indicators whilst illustrating what is different about the Enfield area. As such it identifies the key challenges and opportunities which the borough has in absolute and relative terms.
- 3.1.2 This economic baseline is also assessed comparatively, both geographically relative to comparator areas (Boroughs and Local Authorities in and around London) and dynamically in relation to past years and future forecasts.
- 3.1.3 The benchmarking of Enfield geographically in relation to the comparator areas also develops a picture of Enfield's broader economic context and the wider economic networks with which it is intertwined, including Inner and Outer London, the FEMA, the LLG and the wider South East.

Key Findings

- 3.1.4 Enfield has a **relatively youthful population** (Fig. 2-6), with high growth rates in the younger demographic age bands (Fig. 2-5 and 2-7). This should give the Borough a low dependency burden compared to other areas and could provide a source of high-quality, life-long labour if structural policies and macroeconomic circumstances allow.
- 3.1.5 The youthful population of Enfield may provide some explanation for other economic attributes of Enfield compared to other areas. These include **high growth in the retail industry** for example (Fig. 2-17), which is often a large employer of young people, as well as the **high proportion of residents who work part-time** (Fig. 2-39), and **relatively low real wages and low productivity** (Fig. 2-32 and 2-34).
- 3.1.6 Nevertheless, low productivity and wages are also likely influenced by other notable characteristics of the Enfield economy, including the **significant proportion of self-employed residents** (Fig. 2-35) and the **high proportion of residents in public sector jobs** (Fig. 2-36). Although **skills levels in Enfield do not lag comparator areas** (Fig. 2-30), a **large amount of commuting into Inner London** for high-skill residents is contrasted with lower wage occupations across workplace jobs within the Borough (Fig 2-33).

- 3.1.7 The types of industries that are growing in Enfield compared to comparator areas may also help explain some of these characteristics. There are **high growth rates in manufacturing and distribution** activities which may be providing fewer high-value occupations than in comparator Boroughs that have been better able to capture job growth in finance and business support industries (Fig 2-20). Furthermore, a relatively high concentration of retail, manufacturing and distribution jobs - as consumption based sectors - may help explain a relatively **high volatility rate for unemployment** in Enfield (Fig 2-12 and 2-13), with public sector jobs a further contributory factor given their susceptibility to changes in Government funding policies (Fig. 2-37).
- 3.1.8 High growth rates for distribution and warehousing, and partly for manufacturing, may be partly explained by the **good logistical infrastructure** in Enfield, **particularly the road network**, which sees a much higher rate of usage than in comparator areas (Fig. 2-47). Nevertheless public transport use is currently relatively low, and there are a relatively low number of high-value, Central London jobs easily accessible for Enfield residents (Fig. 2-27). This especially the case for those residing in the Borough's eastern corridor which also has the worst indicators for various forms of social and economic deprivation (Fig. 2-40, 2-41 and 2-42). **Relatively poor accessibility to central London** may also partly help to explain **relatively low house prices** in the Borough (Fig 2-53), though these prices will still be challenging for many as the **house-price to annual-earnings ratio has increased rapidly in recent years**, in line with wider London trends (Fig 2-54).
- 3.1.9 There are a **relatively large number of economically inactive, working-age residents in Enfield**. While a relatively significant part of economic inactivity is accounted for by the student population, there are also **a high proportion of long-term sick residents in Enfield**, often linked to longer duration unemployment. (Fig 2-43).

Next Steps

- 3.1.10 The socio-economic analysis findings provide insight into challenges to be tackled and opportunities the borough has to generate economic benefits for residents and businesses.
- 3.1.11 Going forward, the analysis set out in this report can be used as an evidence base to inform strategic long term policy making and economic development action planning.

Appendix A

Sector Definitions Using Standard Industrial Classification, 2007

Manufacturing

SIC Section C: Manufacturing (all the SIC 2-digit subsectors)

Evening

SIC Section R: Arts, entertainment and recreation (all the SIC 2-digit subsectors)

Wholesale

SIC 2-digit 46: Wholesale trade, except of motor vehicles and motorcycles

Note: does not include the wholesale, retail trade and repair of motor vehicles and motorcycles (which is one SIC code – 45 – while we separated those in 2 categories)

Transport

SIC 2-digit, including:

- 49: Land transport and transport via pipelines
- 50: Water transport
- 51: Air transport

Distribution (including warehousing)

SIC 2-digit, including:

- 52: Warehousing and support activities for transportation
- 53: Postal and courier activities

Communication activities

SIC 2-digit, including:

- 58: Publishing activities
- 59: Motion picture, video and television programme production, sound recording and music publishing activities
- 60: Programming and broadcasting activities
- 61: Telecommunications
- 63: Information service activities

Retail

SIC 2-digit: 47: Retail trade, except of motor vehicles and motorcycles

Note: does not include the wholesale, retail trade and repair of motor vehicles and motorcycles (which is one SIC code – 45 – while we separated those in 2 categories)

Education

SIC Section P: Education (all the SIC 2-digit subsectors)

Health and Social

SIC Section Q: Human health and social work activities (all the SIC 2-digit subsectors)

Construction

SIC Section F: Construction (all the SIC 2-digit subsectors)

Visitor Economy

SIC Section I: Accommodation and food service activities (all the SIC 2-digit subsectors)

Finance and Business Support

SIC 2-digit, including:

- 62: Computer programming, consultancy and related activities
- 64: Financial service activities, except insurance and pension funding
- 65: Insurance, reinsurance and pension funding, except compulsory social security
- 66: Activities auxiliary to financial services and insurance activities
- 68: Real estate activities
- 69: Legal and accounting activities
- 70: Activities of head offices; management consultancy activities
- 78: Employment activities
- 80: Security and investigation activities
- 82: Office administrative, office support and other business support activities

II –Innovative Sectors

Based on Adams, Richard, (2011); The distribution of innovation activity across UK industry, Department for Business Innovation and Skills (BIS)

Life and medical science and technologies and research

- 2110 : Manufacture of basic pharmaceutical products
- 7211 : Research and experimental development on biotechnology
- 7220 : Research and experimental development on social sciences and humanities

ICT

- 6201 : Computer programming activities
- 6202 : Computer consultancy activities
- 6209 : Other information technology and computer service activities

Creative and digital industries

- 1723 : Manufacture of paper stationery
- 1811 : Printing of newspapers
- 1812 : Other printing
- 1813 : Pre-press and pre-media services
- 1814 : Binding and related services
- 2620 : Manufacture of computers and peripheral equipment
- 2630 : Manufacture of communication equipment
- 2670 : Manufacture of optical instruments and photographic equipment
- 5819 : Other publishing activities
- 5912 : Motion picture, video and television programme post-production activities
- 5913 : Motion picture, video and television programme distribution activities
- 5914 : Motion picture projection activities
- 5920 : Sound recording and music publishing activities
- 7311 : Advertising agencies
- 7312 : Media representation
- 9512 : Repair of communication equipment

Tourism and evening economy

- 5510 : Hotels and similar accommodation
- 5610 : Restaurants and mobile food service activities
- 5630 : Beverage serving activities

Logistics and transportation

- 4931 : Urban and suburban passenger land transport
- 4932 : Taxi operation
- 4939 : Other passenger land transport
- 4941 : Freight transport by road

- 4942 : Removal services
- 5020 : Sea and coastal freight water transport
- 5221 : Service activities incidental to land transportation
- 5222 : Service activities incidental to water transportation
- 5223 : Service activities incidental to air transportation
- 5310 : Postal activities under universal service obligation
- 5320 : Other postal and courier activities

Waste and recycling

- 3831 : Dismantling of wrecks
- 3832 : Recovery of sorted materials

Building, construction and real estate

- 4110: Development of building projects
- 4120: Construction of residential and non-residential buildings
- 4331: Plastering
- 4332: Joinery installation
- 4333: Floor and wall covering
- 4334: Painting and glazing
- 4339: Other building completion and finishing
- 4399: Other specialised construction activities
- 6810: Buying and selling of own real estate
- 6831: Real estate agencies
- 6832: Management of real estate on a fee or contract basis

Manufacturing

- 2051 : Manufacture of explosives
- 2052 : Manufacture of glues
- 2053 : Manufacture of essential oils
- 2059 : Manufacture of other chemical products n.e.c.
- 2320 : Manufacture of refractory products
- 2341 : Manufacture of ceramic household and ornamental articles
- 2342 : Manufacture of ceramic sanitary fixtures
- 2343 : Manufacture of ceramic insulators and insulating fittings
- 2344 : Manufacture of other technical ceramic products
- 2433 : Cold forming or folding
- 2511 : Manufacture of metal structures and parts of structures
- 2512 : Manufacture of doors and windows of metal
- 2550 : Forging, pressing, stamping and roll-forming of metal; powder metallurgy
- 2599 : Manufacture of other fabricated metal products n.e.c.
- 2611 : Manufacture of electronic components
- 2612 : Manufacture of loaded electronic boards
- 2640 : Manufacture of consumer electronics

- 2651 : Manufacture of instruments and appliances for measuring, testing and navigation
- 2711 : Manufacture of electric motors, generators and transformers
- 2731 : Manufacture of fibre optic cables
- 2732 : Manufacture of other electronic and electric wires and cables
- 2740 : Manufacture of electric lighting equipment
- 2751 : Manufacture of electric domestic appliances
- 2752 : Manufacture of non-electric domestic appliances
- 2790 : Manufacture of other electrical equipment
- 2821 : Manufacture of ovens, furnaces and furnace burners
- 2823 : Manufacture of office machinery and equipment (except computers and peripheral equipment)
- 2825 : Manufacture of non-domestic cooling and ventilation equipment
- 2829 : Manufacture of other general-purpose machinery n.e.c.
- 2892 : Manufacture of machinery for mining, quarrying and construction
- 2899 : Manufacture of other special-purpose machinery n.e.c.
- 2910 : Manufacture of motor vehicles
- 2931 : Manufacture of electrical and electronic equipment for motor vehicles
- 3020 : Manufacture of railway locomotives and rolling stock
- 3091 : Manufacture of motorcycles
- 3212 : Manufacture of jewellery and related articles
- 3240 : Manufacture of games and toys
- 3313 : Repair of electronic and optical equipment
- 3314 : Repair of electrical equipment
- 3317 : Repair and maintenance of transport equipment n.e.c.
- 3319 : Repair of other equipment
- 3320 : Installation of industrial machinery and equipment

Food manufacturing and processing

- 1011 : Processing and preserving of meat
- 1012 : Processing and preserving of poultry meat
- 1013 : Production of meat and poultry meat products
- 1020 : Processing and preserving of fish, crustaceans and molluscs
- 1085 : Manufacture of prepared meals and dishes
- 1089 : Manufacture of other food products n.e.c.
- 1101 : Distilling, rectifying and blending of spirits
- 1102 : Manufacture of wine from grape
- 1103 : Manufacture of cider and other fruit wines
- 1104 : Manufacture of other non-distilled fermented beverages
- 1105 : Manufacture of beer
- 1106 : Manufacture of malt
- 1107 : Manufacture of soft drinks; production of mineral waters and other bottled waters

Financial activities

- 6611 : Administration of financial markets
- 6612 : Security and commodity contracts brokerage
- 6619 : Other activities auxiliary to financial services, except insurance and pension funding
- 6630 : Fund management activities

Employment activities

- 7810 : Activities of employment placement agencies
- 7820 : Temporary employment agency activities
- 7830 : Other human resources provision

Sale, maintenance and repair motor vehicles

- 4520 : Maintenance and repair of motor vehicles
- 4531 : Wholesale trade of motor vehicle parts and accessories
- 4532 : Retail trade of motor vehicle parts and accessories

Security Activities

- 7490 : Other professional, scientific and technical activities n.e.c.
- 8010 : Private security activities
- 8020 : Security systems service activities
- 8030 : Investigation activities

Industrial cleaning

- 8121 : General cleaning of buildings
- 8122 : Other building and industrial cleaning activities
- 8129 : Other cleaning activities

Specialist Retail

- 4741 : Retail sale of computers, peripheral units and software in specialised stores
- 4742 : Retail sale of telecommunications equipment in specialised stores
- 4743 : Retail sale of audio and video equipment in specialised stores
- 4751 : Retail sale of textiles in specialised stores
- 4752 : Retail sale of hardware, paints and glass in specialised stores
- 4753 : Retail sale of carpets, rugs, wall and floor coverings in specialised stores
- 4754 : Retail sale of electrical household appliances in specialised stores
- 4759 : Retail sale of furniture, lighting equipment and other household articles in specialised stores
- 4761 : Retail sale of books in specialised stores
- 4762 : Retail sale of newspapers and stationery in specialised stores
- 4763 : Retail sale of music and video recordings in specialised stores

- 4764 : Retail sale of sporting equipment in specialised stores
- 4765 : Retail sale of games and toys in specialised stores
- 4771 : Retail sale of clothing in specialised stores
- 4776 : Retail sale of flowers, plants, seeds, fertilisers, pet animals and pet food in specialised stores
- 4777 : Retail sale of watches and jewellery in specialised stores
- 4778 : Other retail sale of new goods in specialised stores

