

# Enfield Observatory

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## SOCIO-ECONOMIC MONITOR

– UPDATE

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## Introduction

This report sets out a number of indicators of the socio-economic conditions in Enfield and how they have changed. It also offers some views on the outlook for Enfield, extending in some economic aspects to North London to accord with sub-regional initiatives and available evidence. Comparisons are made with London and national statistics.

This is the first update of the Monitor published in April 2006. It retains much of the text from the original and includes more material describing the latest known trends, situation and prospects. All substantially changed text in the main body of the report is denoted by blue font.

This report does not retread the path previously taken on some measures of deprivation – these are now fairly well covered by other publications available from the Enfield Observatory [see below]. It does focus on the more recently released data on welfare benefits and measures of income.

This report may be seen as a useful one to inform debates which are now being held or are to be held about what kind of Enfield the community wants it to be. This is clearly a fundamental issue in the application of the objectives in the Sustainable Community Strategy – *Enfield's Future* – and in the development of new Local Area Agreement outcomes, the Core Strategy for the Enfield Plan and the Council's Place Shaping activities.

For convenience, a selection of statistics about the latest situation in Enfield is given in two appendices at the very back of the report. Readers who wish to gain a quicker picture of wider community and public service aspects are advised to refer to the *Borough Profile* and *Borough Portrait* documents.

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For further research and information about Enfield please visit the Enfield Observatory online: [www.enfield-observatory.org.uk](http://www.enfield-observatory.org.uk)

Reports on deprivation available are:-

- 2001 Census Briefing Note 06: Deprivation
- Indices of Deprivation 2004 - Briefing Note on the results for Enfield
- Potential Neighbourhood Decline
- Eastern & Southern Study report
- Indices of Deprivation 2007 – Briefing on the results for Enfield

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Thanks to Martin Garnar and Ilhan Basharan, Policy Officers at Enfield Council for material in regard to community cohesion; to Peter Barry Estate Agents and to Reed Consulting

## **Executive Summary**

This report examines a range of data and other evidence on the socio-economic position of Enfield, largely looking at changes over the latest five and two year periods available and providing London and national comparator statistics.

The Enfield Strategic Partnership should find this evidence useful in its process to review the Sustainable Community Strategy in 2009 and for other strategies before then, especially given the welcome growth in data made available by the Government and others since the first Strategy was first formulated in 2002.

A key finding from the latest monitoring is the apparent turnaround in the employment and unemployment situations – the employment rate looks to be upward and unemployment is down significantly over two years ago. The news for business also appears to be broadly encouraging although concerns persist about the underlying economic structure and productivity levels.

However, Income Support and Housing Benefit claimant numbers have continued to increase, against the national trend. The private rental market may have had an effect in this regard, attracting housing placements by other local authorities and care services. In regard to disabilities the number claiming Disability Living Allowance continues to outpace the national average and although Incapacity Benefit claims have decreased they are less than the national decrease.

The most alarming finding is possibly that in regard to child poverty which is likely to have worsened further. At May 2007 about a third of children under 11 were living in families claiming the key welfare benefits. The latest available evidence also confirms the previous set, that those in work are not accruing the income levels or income growth that would be expected from London and national trends. This is slightly surprising given the reasonably satisfactory levels of young peoples' higher and further education participation and skills attainment – this might suggest that problems lie more with the older workforce and with the economic structure of the Borough. Further research is needed on the income issues.

Economic and deprivation indicators chime with the limited evidence available on the social structure of Enfield – that it may be losing out on those who are upwardly socially mobile and be tending to be a place for those in the middle of society. The economic data suggests that there is also an increase in those at the bottom of society. However, the latest deprivation indices confirm the previous findings that Enfield is not as socially or economically polarised as some people might think it is, relative to many other areas in the country.

The report touches on some housing issues in advance of the forthcoming Local Housing Market Assessment. House prices remain quite cheap and have not risen as fast as the London average. The strong demand for low cost

housing is clear from recent commercial research. This reinforces the impression given by the Housing Benefit caseload growth cited above.

One less surprising finding is, as before, that Enfield is becoming ever more culturally diverse, with a number of significant 'new' communities emerging. The best guide to the trends continues to be the School Census results, considering the variable ethnic mix by age. These results indicate that there will be increases to a number of minority communities. Such diversity brings a risk to community cohesion but the story so far, at least, is reassuring.

Future development prospects and the economic outlook are partly confused by some conflicting messages from the latest projections and proposals. Both population and employment growth is projected to be very low by comparison to other parts of London. Yet there are expectations for higher levels of growth as reflected in major development proposals, particularly at Central Leaside.

The outlook for the social structure must inevitably be even more uncertain. This is another area for more research, to understand aspirations, lifestyles, the attractors and detractors in Enfield. This understanding will help to improve customer orientated public services and the ability of the Strategic Partnership to deliver successful place shaping that creates mixed, sustainable communities.

# 1. The social trends

## Population

The trend in total population can be indicated by the two most authoritative sets of estimates from the Office for National Statistics (ONS) and the Greater London Authority (GLA). In 2007 the ONS revised all estimates between 2002 and 2005 and produced 2006 estimates using a new method. Over the five years Enfield's population increased by 2.9% compared to 2.6% in London and 2.7% in England. Within London, Enfield ranked 12<sup>th</sup> for increase, although some boroughs with the highest increases had somewhat artificial upward adjustments following studies made by the Office for National Statistics. Four of the 32 boroughs lost population over that five year period. Over the last decade and more Enfield, like many other areas in London, has 'depended' upon net international migration including asylum seekers and visitors staying on past their visa expiration for much of its population increase. In recent years the inflow of asylum seekers has reduced but other international migrants continue to have a significant effect. The GLA produces projections based on the ONS 2001 estimates and these are available for each year up to 2031. The future trend is considered later, under the Social Outlook section.

## Social structure

Some tentative findings can be made from a variety of data, some of which has been included under the Economic side of this Monitor. One source is a social classification, ACORN, produced by CACI Ltd, taking into account lifestyles and income. Over the two years to 2007, Enfield shows as having lost population falling within the top two social categories, particularly in the second group labelled 'Urban Prosperity'. Bromley and Enfield are the only London boroughs to have lost population in both the top two categories.

Readers may also wish to refer to the Observatory Team's previous research and the latest Information Briefing on the Indices of Deprivation 2007. These imply an increasing share of deprived people. Accordingly, inferences can be made about which socio-economic groups are most likely to be growing, e.g. out-of-work lone parents.

## Disabled

There is somewhat contradictory evidence as to the trend in disabled. The number registered with the Council decreased by 1.4% from 2001/02 to 2004/05 whereas claimants of Disability Living Allowance increased by 21.8% between 2002 and 2007. Claimants of Incapacity Benefit/Severe Disablement Allowance increased by 7.7% in the same period. Those entitled to receive Attendance Allowance increased by 7.1%. Over the two years to May 2007 Disability Living Allowance (DLA) claimants increased but Incapacity Benefit/Severe Disablement Allowance (IB/SDA) claimants decreased – see Tables 1 and 2.

Over five years Enfield ranked 184<sup>th</sup> out of the 354 English local authority districts for the change in DLA claimants and 38<sup>th</sup> for IB/SDA claimants. A clear upward trend is also indicated by Income Support claimants receiving

incapacity related benefits – up 7.9% in the same period. This was the 9<sup>th</sup> highest increase in England, excluding the Isles of Scilly. The Attendance Allowance increase of 6.7% was much lower than the national increase of 11.9%. There was an increase of 24% in the number of Disabled Person's [Blue] Badge issues from 2002 to 2005 but a 5% fall in the next year. Over five years the increase was 24%, so broadly in line with the DLA increase shown above.

Table 1: Change in Disability Living Allowance claimants, May 2005 – May 2007

Area	Disability Living Allowance (DLA), total claimants	DLA claimants on higher rate mobility component
Enfield	from 9,940 to 10,540 up 6.0%	from 5,150 to 5,380 up 4.5%
London	5.3%	3.3%
England	5.7%	3.6%

Table 2: Change in Incapacity Benefit claimants, May 2005 – May 2007

Area	IB plus Severe Disablement Allowance (SDA) claimants
Enfield	from 12,470 to 12,240 down 1.8%
London	down 2.3%
England	down 3.1%

### Carers

The number receiving Carer's Allowance in Enfield has risen comparatively slowly over the long term contrary to the shorter term finding given in the 2006 Monitor. Over the May 2002 to February 2007 period the Enfield increase was 38% compared to a national increase of 60%. Over two years the comparison is 9.9% compared to 14.2%. Over the longer period Enfield had the 12<sup>th</sup> lowest increase of the 354 English local authority districts.

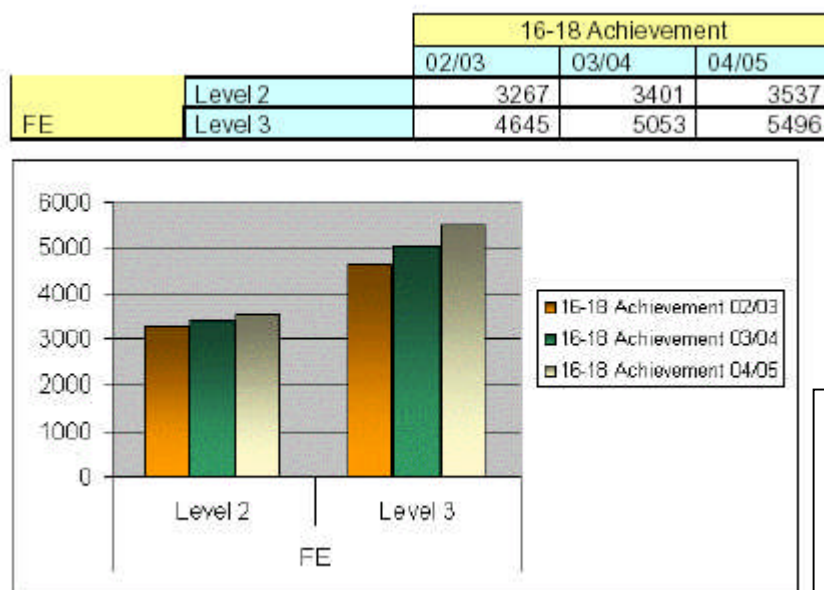
### Students

The proportion of 16 and 17 year olds continuing in (or resuming) education has increased:

Table 3: Educational participation at 16 and 17 (% of age group)

16 year olds	End 2001	End 2003	2005
Enfield	76	83	86
London	75	78	82
England	71	72	76
17 year olds			
Enfield	65	68	74
London	63	67	71
England	58	59	63

The prime age group for students, roughly 16-23 year olds, was projected to have fallen in size by 8.4% over 4 years from 2001 to 2005. In regard to Middlesex University, statistics collected by the Higher Education Statistics Authority (HESA) show that it had a fall in student numbers of 8.4% in just two years, from 2001/02 to 2003/04, one of the greatest losses amongst all HE institutions in England in that period. Set against that, there has been a clear increase in local students going into higher education at age 18/19, from 31.7% to 38.7% of year 11s, 2003/04 to 2004/05.



The further education statistics for North London are encouraging in terms of attainment of Level 2 and 3 qualifications. There is a clear upward trend: There were substantial improvements in the official success rates of 16-18 year old students at the three Enfield colleges, comparing 2003/04 to 2004/05 though the available trends for students of all ages compared to national success rates are inconclusive. More evidence is needed on the trends at the ends of the 'spectrum' – high achievers and those not continuing in education or entering employment.

Trends in the official 'success rates' for all courses at local colleges are shown in the following table:

Table 4: Local college success rates

College	2003/04 % and rank	2004/05 % and rank	2005/06 % and rank
Capel Manor	70.7 (98 <sup>th</sup> )	78.2 (46 <sup>th</sup> )	73.7 (134 <sup>th</sup> )
Enfield	56.8 (301 <sup>st</sup> )	63.3 (224 <sup>th</sup> )	66.2 (251 <sup>st</sup> )
Southgate	47.5 (404 <sup>th</sup> )	81.2 (31 <sup>st</sup> )	82.3 (33 <sup>rd</sup> )

The ranks are out of 484 FE institutions in England.

### Secondary education performance

At Key Stage 3, over the past four years, Enfield's Level 5 pass rate in the three measured subjects has risen by 14 percentage points – one percentage point above the England improvement. For the GCSE benchmark measure of

5 A\*-Cs including English and Mathematics, Enfield's rate improved by 6.9 percentage points from 2004 compared to a national improvement of only 3.4.

### Ethnicity

Ideally, one would use the state school pupil data as the best indication of changes since 2001 but the classification used has changed and there was a high number of 'unclassifieds' in 2002. This means that the most reliable comparison is that between the 2003 and 2007 pupil counts as shown in Table 5 below.

Table 5: Changes in resident pupils by ethnicity, 2003-07, for 22 groups

Group	2003	2007	change
Bangladeshi	935	1141	22.0%
Black African	3009	3947	31.2%
Black Caribbean	2813	2974	5.7%
Chinese	199	197	-1.0%
Greek	533	364	-31.7%
Greek Cypriot	2464	2234	-9.3%
Indian	1097	1114	1.5%
Kurdish	658	807	22.6%
Other Asian	904	987	9.2%
Other Black	585	602	2.9%
Other Ethnic Group	1233	1463	18.7%
Other mixed	1978	1940	-1.9%
Pakistani	352	361	2.6%
Somali	742	1510	103.5%
Turkish	2101	3252	54.8%
Turkish Cypriot	1656	1478	-10.7%
Unclassified	598	167	-72.1%
White and Asian	264	421	59.5%
White and Black African	150	311	107.3%
White and Black Caribbean	511	806	57.7%
White British	17874	14480	-19.0%
White Irish	754	581	-22.9%
White Other	1852	2472	33.5%

A number of groups have shown substantial increases in their school age populations, as shown by the school censuses. The groups with increases of more than 300% in two years were Albanian, Congolese, (other) Black African and (other) White Eastern European.

The Greater London Authority has now delivered Ethnic Group Projections for 10 ethnic groups, as distinguished in the 1991 Census output. These show significant increases in the non-White groups, as would be expected. In Enfield the highest growth over the five years to 2007 is shown for the 'Other'

group at 47%. By absolute numeric increase, the largest additions were to the Black African, Other and Black Caribbean groups.

Enfield Council has made some estimates of the total population of all ages in 22 specific groups as in Table 5, using the school census data. The ethnic groups showing increases of more than 10% from 2001, in descending order, are:-

- Somali
- Other Ethnic Group
- Kurdish
- Turkish
- Other Asian
- Other Black African
- Mixed: White and Black Caribbean
- Mixed: White and Asian
- Mixed: White and Black African
- Bangladeshi
- Other Mixed
- White: Irish
- Pakistani

### Household type trends

The trends shown by GLA projections are given in Table 6.

Table 6: Household type changes, 2001-06

Type	no. change	% change
Married couple	-2766	-6%
Cohabiting couple	2118	27%
Lone parent	1403	15%
Other multi-person	100	1%
One person	3413	10%
Total	4269	4%

### Community cohesion

Community cohesion has now been defined by the Government:<sup>1</sup>

Community cohesion is what must happen in all communities to enable different groups of people to get on well together. A key contributor to community cohesion is integration which is what must happen to enable new residents and existing residents to adjust to one another. The Government vision of an integrated and cohesive community is based on three foundations:-

- People from different backgrounds having similar life opportunities
- People knowing their rights and responsibilities

<sup>1</sup> The Government's Response to the Commission on Integration and Cohesion; Department for Communities and Local Government; February 2008

- People trusting one another and trusting local institutions to act fairly

and three ways of living together -

- A shared future vision and sense of belonging
- A focus on what new and existing communities have in common, alongside a recognition of the value of diversity
- Strong and positive relationships between people from different backgrounds

The Council has in recent years piloted a number of quality of life indicators, including people's perceptions on aspects of community cohesion. Cohesion appeared to have improved between 2003 and 2005, as indicated in Table 7 below, among Enfield Citizens Panel members<sup>2</sup>. Residents are more likely to feel that they can influence decisions, either on their own or collectively. This may in part be a reflection of being involved in a panel, but it is encouraging to find a small favourable movement in the '*people from different backgrounds get along well*' question, as it is unlikely that this is directly a function of panel membership.

In 2006 a Best Value survey of residents was carried out in all local authorities and included a question: "To what extent do you agree or disagree that this local area is a place where people from different backgrounds get on well together?" For Enfield, 79% agreed and 18% disagreed. This is markedly higher than the 2005 Citizens Panel result to a near identical question. So is the latest 2007 Residents Survey result of 74% agree and 12% disagree to the same question except for "...your local area.." – which may possibly have affected the results.

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<sup>2</sup> The Enfield Citizens Panel was first set up by the Council in 1999, as a way to regularly consult and involve local people in the development of services and policies. It consists of over 1,000 residents selected to reflect the population of Enfield by age, gender, ethnic background, disability and geographical area.

Table 7: Citizens' Panel survey findings on community cohesion

<i>Question:</i>	<i>To what extent do you agree or disagree with the following statements?</i>					
	<b>I can influence decisions affecting my local area</b>		<b>By working together, people in my neighbourhood can influence decisions that affect the neighbourhood</b>		<b>People from different backgrounds get along well in my local area</b>	
	<b>Wave 9<sup>3</sup> Nov-Dec '03</b>	<b>Wave 12 June-Aug '05</b>	<b>Wave 9 Nov-Dec '03</b>	<b>Wave 12 June-Aug '05</b>	<b>Wave 9 Nov-Dec '03</b>	<b>Wave 12 June-Aug '05</b>
<i>Base: All Respondents</i>	(546) %	(466) %	(546) %	(466) %	(546) %	(466) %
<b>Agree</b>	<b>16</b>	<b>26</b>	<b>45</b>	<b>51</b>	<b>44</b>	<b>48</b>
<b>Disagree</b>	<b>51</b>	<b>42</b>	<b>27</b>	<b>26</b>	<b>16</b>	<b>15</b>
<b>Net agree</b>	<b>-35</b>	<b>-16</b>	<b>+18</b>	<b>+25</b>	<b>+28</b>	<b>+33</b>

*Source: MORI*

## 2. The Social Situation

### Social structure

One of the ways of describing the social structure of residents is by the assignment of people to a hierarchic set of categories based on occupation and economic activity. In the 2001 Census results the ONS produced a social grade classification as used by the marketing industry in this country.

AB: Higher and intermediate managerial /administrative / professional

C1: Supervisory, clerical, junior managerial /administrative / professional

C2: Skilled manual workers

D: Semi-skilled and unskilled manual workers

E: On state benefit, unemployed, lowest grade workers

Table 8: Social Grades at 2001

	AB	C1	C2	D	E
Enfield	22.5%	33.0%	13.4%	15.6%	15.4%
London	26.5%	33.0%	11.0%	14.3%	15.2%
England	22.2%	29.7%	15.1%	17.0%	16.0%

Enfield is clearly 'lower grade' than the London average and the D&E proportion is also much higher than the Outer London average of 28.1%, i.e. what one might expect to find in a generally suburban situation.

<sup>3</sup> Enfield Citizens' Panel Wave 9 – postal self-completion questionnaires mailed out to 1,297 Panel members on 3 November 2003, a total of 546 were returned by 29 December 2003.

Another type of social classification, taking into account lifestyles and income, is ACORN, produced by CACI Ltd. This shows up very marked differences between Enfield and the London and Great Britain structures of society:

Table 9: ACORN categories at 2007 (percentages of population)

Category	Enfield	London	GB
Wealthy Achievers	9.5	6.0	24.8
Urban Prosperity	30.9	44.7	12.0
Comfortably Off	19.6	16.9	27.7
Moderate Means	24.9	10.8	13.8
Hard-Pressed	14.6	21.1	20.8

It is notable that Enfield has both wealthy and poor proportions greater than the GB average (when combining the top two and bottom two categories). Also that Enfield is poorer than London (combining the bottom two categories).

### Students

A large student population can naturally have a significant effect on both the social and economic aspects of the local community. It can ultimately raise the skill levels of the resident population. The 2001 Census showed Enfield as having 18,450 resident students, being 9.3% of the total population aged 16-74. This was just below the London average though a whole percentage point above the Outer London average. The number in higher education was 10,195 for the year 2001/02.

In terms of the progression of local residents to higher education, estimates for 2002/03 show a participation rate of 36% by age 19, ranking Enfield equal 44<sup>th</sup> of 204 local education authority areas in England, Wales and Scotland. The England average was estimated at about 30%. [Analysis of first year students in 2004/05](#) also shows that Enfield has a high progression rate. More recent data was awaited at the time of writing.

[Analysis of first degrees awarded in 2004/05](#) shows that Enfield had a relatively low proportion of graduates achieving 1<sup>st</sup> and Upper 2<sup>nd</sup> class degrees (out of all awards), at 57.5%. This ranked Enfield 287<sup>th</sup> out of the 354 English local authorities.

The largest local higher education institution is Middlesex University, with five campuses across North London, three of which are in Enfield, and a campus in Dubai. Enfield campuses are at Trent Park, Cat Hill (where Arts and Education programmes are offered) and (till summer 2008) in Ponders End, where social sciences and health sciences are taught). It is one of the largest universities in the country with about 22,000 students at its London campuses and up to 10,000 more studying for a Middlesex qualification with academic partners around the world. In terms of higher education students it ranked 23<sup>rd</sup> of 166 institutions in size in 2005/06, excluding the Open University. In terms of attracting international students, Middlesex is in twelfth position nationally. Nearly one in four students on London campuses is from outside the UK.

Across the four North London boroughs the total number of 16-18 year old students was about 27,000 in 2004/05. Adult numbers across North London can be simplified as:

Course type	Number of students
Further Education to 'Level 2'	14,400
ESOL*	15,000
Skills for Life	26,500

\* English for Speakers of Other Languages

In 2005/06, Southgate College recorded a total of 15,621 learners, Enfield College had 12,976 learners and Capel Manor College had 4,041 learners.

There is some survey data on the destinations of graduate leavers from higher education. The response to the survey from Middlesex University graduates was below the national average and the figures might be misleading. However, the results show that the University was very close to the bottom of the performance ranking for graduates progressing to employment or further study. It is also in a similar position for first year students continuing in higher education and for students projected to neither attain an award or transfer to another institution. The proportions of first and upper second class honours obtained on first degrees was below the national average in 2004/05. In 2005-06, 9.3% of Middlesex graduates were deemed 'unemployed' six months after graduation. 45.6% of Middlesex students achieved a 1<sup>st</sup> or upper second degree award.

Middlesex University does however perform very well on almost all aspects of the learning experience of its students. The largest ever survey of international students – more than 250,000 - undertaken by i-graduate in late 2007, puts Middlesex top in London in a number of categories: assessment, teaching technology, performance feedback, learning spaces and employability. A 2007 re-evaluation for the Higher Education Funding Council for England on the National Student Survey, had Middlesex overall in the top 60 of UK universities and for 'teaching and learning' Middlesex was third in London and in 33<sup>rd</sup> place overall in the UK (i.e. in the top 25%).

Educational performance at the two main further education colleges is significantly affected by the wide ability range of their student intake. The average points score of students entered for GCE/VCEs in 2005 was 55.7 at Enfield College and 63.7 at Southgate College, compared to the Borough average of 77.2 and an England average of 79.9. The Intermediate VQ achievement level was 77% at Enfield College and 70% at Southgate College, compared to a national average of 79.7%.

In 2007 the average GCE/VCE (and equivalent) points score per pupil achieved at Enfield schools and colleges was 641.2, compared to 731.1 in England. At Enfield College it was 515.3 and at Southgate College it was 518.7.

In Enfield, 47.5% of pupils had a minimum of 5 A\*-C grades including English and Mathematics. Nationally the equivalent figure was 46.7%. For the measure of 5 A\*-Cs in any subjects the 2007 Enfield rate was 56.2% compared to a national average of 62.0%.

### Skills and qualifications

The 2001 Census provides the most reliable data on qualifications. The results show a similar story to the social grade (as would be expected). Enfield is markedly below the London average for the proportion of people with qualifications at Level 3 and above. ('A' Levels and higher). The proportions of all aged 16-74 for lower levels are shown in the following table.

Table 10: No or low level qualifications at 2001

	None	Level 1	Level 2	sum
Enfield	28.4	15.2	19.0	62.5
London	23.7	13.0	17.1	53.8
England	28.9	16.6	19.4	64.8

Analysis of the Census data for what might be called the core working age group, post education, of 25-59 shows a very similar pattern as in the above table.

There is some Government collated data on young people achieving Levels 2 and 3 by age 19. For Level 2, Enfield's proportion was 66.9% at mid-2006 which ranked 82<sup>nd</sup> out of 150 English local education authorities. For Level 3 the respective results were 46.3% and 55<sup>th</sup>.

The Enfield Skills and Employment Strategy provides analyses on employment by skill level using the sample survey data from the Annual Population Survey. This shows that Enfield residents have slightly higher employment rates across most qualification levels compared with the London averages – except for those who are only qualified to level 1 (64% rate) or who have no qualifications (34% rate). Although the employment rates for Enfield's higher qualified residents are good, the Borough has fewer of these people than elsewhere in London.

### Ethnicity

The most reliable statistics on the ethnicity of the total resident population remain those from the 2001 Census. A good guide to the school age population is provided by the [school census](#) conducted in state schools. The ethnic group breakdown for pupils resident in Enfield and attending Enfield state schools is given in Appendix 1.

### Religion

As shown by the 2001 Census, for the first time, Enfield has high proportions in all the main non-Christian religions except Sikh, compared to national averages. The Muslim population level was 9.6% at 2001 which was high compared to the Outer London average of 6.5%. This will have increased since then given that the proportion amongst children was 13.6%. The latest

market research estimates purchased by the Council put the Muslim proportion in the adult population at 12.9%.

### **Social polarity**

Whilst there is a public perception and a body of evidence that Enfield is a socially polarised area, indicators such as the Indices of Deprivation 2007 show that it is actually not as polarised geographically as many other areas. The Indices provide scores for super output areas (SOAs)<sup>4</sup>. Upon calculating the range of scores between the single most deprived and least deprived SOAs in each local authority in England, Enfield only has the 90<sup>th</sup> greatest range out of the 354 English authorities. Using the range of SOA ranks rather than scores then Enfield ranks 86<sup>th</sup> and, perhaps more interestingly, 3<sup>rd</sup> in London. An arguably more meaningful measure of polarity is to take account of the best and worst proportions in each authority. There are 221 authorities having SOAs in both the best and worst fifths (quintiles) nationally but Enfield is 152<sup>nd</sup> in order of the range between the averages of the SOA ranks in those quintiles. Another measure is to compare the numbers of SOAs in authorities having at least a minimum number of SOAs in the worst quintile with any number in the best quintile. On a minimum of 11 SOAs (about 16,500 population) Enfield ranks 55<sup>th</sup> out of 110 for the most equal ratio of worst to best.

The ACORN data, mentioned earlier, may also suggest a degree of stability rather than polarisation, with the fastest growing ACORN category being the middle one of 'Comfortably Off'. The most numerous group within that category is 'Secure Families'.

### **Community cohesion**

Surveys conducted by the independent research organisation MORI show that older residents (aged 65+) and those in social classes AB are more likely to feel able to influence local decision-making (35% and 37% respectively). Older residents are also more likely to feel that people from different backgrounds get along well in their local area (62% of those aged 55+). The Borough's white residents are more likely to feel unable to influence local decisions (48%) as well as being less likely than ethnic minority residents to think that by working together people in their neighbourhood can influence local decisions (47% vs. 63%).

2001 Census data on ethnic groups shows there was very little residential segregation at that time. There were only 28 output areas – covering about 6% of Enfield's total population – where non White British made up more than two thirds of the population. They were all in Edmonton bar one exception. The ACORN classification shows that Enfield has much smaller shares of the population than London has in areas with 'ethnic' or 'Asian' in the descriptions. This is even less so for 'Hard Pressed Multi ethnic purpose built estates and Multi ethnic crowded flats'.

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<sup>4</sup> As defined by the Office for National Statistics, intended to cover areas with an average population size of 1500. See the Observatory's *Guide to Geographies*

## Housing tenure

The Housing Study using a sample survey conducted in early 2004 produced the results shown in Table 11 .

Table 11: Housing tenure, 2004

Tenure	% of households
Owner-occupied (no mortgage)	30.0
Owner-occupied (with mortgage)	42.9
Council	10.3
RSL	5.6
Private rented	11.1

The 2007 Residents Survey gave the results shown in Table 12

Table 12: Housing tenure, 2007

Tenure	% of households
Owner-occupied (no mortgage)	26.8
Owner-occupied (with mortgage)	39.4
Council	10.7
RSL	2.8
Private rented	14.7

Note: this excludes 1% Other and 4% Refused

By reference to the tables above and below it is clear that the RSL figure must be too low.

By dwelling stock the Council's estimates for March 2007 are given in Table 13.

Table 13: Dwelling stock by broad tenure, 2007

Tenure	% of dwellings
Private sector	84.1
Council	9.8
RSL	6.0

## Household types

The GLA projected household type structure at mid-2006 is shown in Table 14.

Table 14: Household types, 2006

Type	no.	% split
Married couple	46926	40.9%
Cohabiting couple	10042	8.7%
Lone parent	11072	9.6%
Other multi-person	8696	7.6%
One person	38086	33.2%
Total	114823	

The key differences in the structure from the London average are the higher proportion of married couple households and much lower level of other multi-person households.

### 3. The Social Outlook

#### Population

On the basis of the latest GLA 2007 Round of Demographic Projections, Enfield's population may decrease by 1300 people (minus 0.5%) from 2008 to 2018, on the Low variant of the Projections. Only Enfield and Sutton out of the 32 London boroughs show a decrease in population. On the High variant there is an increase of 2700 (0.9%).

By age group the most distinct trends are:-

- Increases in 5-9s, 50-59s, 65-69s and 85+
- Decreases in 15-19s and 25-34s

- see Appendix 2

Numbers of state pensionable age increase from 2012, most sharply from 2019.

#### Disabled

There have been no projections made of how the numbers of disabled might change although one could make some crude assessment using prevalence rates applied to future age structures. Significant increases are likely as Enfield's population takes on a more markedly older profile into the 2010s and particularly the 2020s. National research indicates that although people are living longer their later years are more likely to be times of ill health.

#### Students

A significant factor affecting the future level of students must be the physical capacity to accommodate them, both in residential and educational terms.

In regard to Middlesex University, the Ponders End Campus will close in summer 2008, with all students and programmes transferring to the University's Hendon Campus.

In terms of academic performance, the 14-19 Strategy for Education and Training, the Aimhigher and Excellence in Cities initiatives (work with Able Gifted and Talented pupils, the work of Learning Mentors in schools, Learning Support Units, City Learning Centres, the Education Action Zone and more) will raise skill levels of all students. [The work of Aimhigher across schools and colleges in Enfield aims to increase the numbers of students in the borough progressing to higher education institutions.](#)

#### Ethnicity

It is clear enough from the [School Census](#) data that Enfield will continue to host an increasingly multi-cultural population. The White British proportion of 5-9 year olds at 2007 was 30.5% compared to 35.3% of 10-14 year olds. For the calendar year 2003 the proportion of births to mothers born outside the UK was 48% in Enfield compared to 47% in London and 19% in England. [The latest GLA Ethnic Group Projections for the 2007-12 period show less marked changes than before. The Other group continues to be the one showing the fastest growth, at 19%, followed by Bangladeshi and Black African at around 13%. In simple numeric terms, the other Black groups also feature. The White group share is shown as falling from 71% to 68%.](#)

### **Social structure and social polarity**

This can only be a matter for conjecture. Surveys indicate that Enfield, with its good schools, is an attractive area for families who can afford to stay or move into the area. It may also be attractive to 'empty nesters' – a survey by Yellow Pages found that EN1 is a much sought after area for couples whose children have left home. There is also some evidence of trends, as presented in the next section, suggesting that Enfield might retain or attract low income households.

There is a clear need to develop understanding of the likely changes in the social structure and how new approaches such as Place Shaping can impact on it. This understanding should be informed by the forthcoming Local Housing Market Assessment and by expected changes in housing and planning policy with regard to housing provision. Enfield Council is undertaking work to understand its customers and the wider resident base. Research will be needed by other public services to provide viable services that offer increased customer choice.

### **Community cohesion**

It may be speculated that there may be tension amongst the newly retired as between those with final salary index linked pensions and those with much lower fixed pensions. This may raise issues about universal entitlement to concessions for OAPs.

Similar sorts of considerations may apply if new housing developments contain 'pepper potted' or more physically conspicuous social housing – between those who have had to 'pay their way in' and those who are subsidised to live in the same street or block. This may increase resentment if social housing forms an increasingly larger part of new development.

Policy makers and the Police will no doubt be mindful of the risk of religious extremists agitating a possibly fragile situation. This may be quite localised, particularly in areas likely to experience a high growth of Muslims. Similar considerations apply with extreme nationalists, as the community becomes increasingly multi-cultural.

The Commission on Integration and Cohesion identified two issues which have emerged more recently:-

*.. settled communities are worried about the fair allocation of public services – with some thinking immigrants and minorities are getting special treatment  
... Globalisation adds another layer of complexity to the picture – UK residents now come from all parts of the globe, people's identities are becoming more multi-layered and global events now have local ramifications.*

Both of these issues may have a bearing on the prospects for cohesion in Enfield.

The Council is planning to publish an annual report in summer 2008 after the first year of Community Cohesion Strategy operation to show what

achievements have been made. At the same time, a review of the Strategy to take account of the Government's response to the Commission for Integration and Cohesion recommendations will be undertaken. The action plan will be also revised to make it more focused and achievable.

### **Household type trends**

The trends shown by GLA projections are given in Table 15. It can be seen by comparison with Table 6 that whilst cohabiting couples continue to be shown as the fastest growing type the next fastest is now one person households as against lone parents before.

Table 15: Household type projections, 2006-11

Type	no. change	% change
Married couple	-2784	-6%
Cohabiting couple	1713	17%
Lone parent	666	6%
Other multi-person	169	2%
One person	3396	9%
Total	3159	3%

## 4. The Economic Trends

### Economic performance

North London's industrial structure is not particularly conducive to economic growth. Research for the LDA showed that it experienced a growth of 10% from 1980 to 2000 due to its structure. This was the lowest of the London sub-regions and may be compared to a London average of 15%. Over the 1991-2001 period, Enfield greatly 'under-performed' on the measure of gross value added (employee earnings and gross operating surplus) – at less than half the London rate (30.9% compared to 69.6%). Restructuring of the local economy may now be having an impact as large businesses in Enfield, at least, are reported to be doing well in terms of profitability. According to an ICC Credit survey of businesses with a turnover exceeding £7m, 91% of such businesses in Enfield were in profit – the leading town in the whole of the UK.

### VAT registrations

The number of traders registering for VAT in Enfield has been increasing and the total of registered traders has also been increasing. The growth rate of 3.2% for 2001-2004 was above both London (1.7%) and England (2.7%). In the two years to 2006 Enfield's growth continued but at a slower pace than both London and England – see Table 16.

Table 16: VAT registered stock, 2004-06 (end of years)

Area	% change in stock
Enfield	3.2%
London	4.9%
England	4.3%

### Commercial floorspace stock change

Enfield did not match either the national or London rates of growth over the three years to 2004, although one might consider the London trend to be distorted by speculative developments. However, this was reversed in the latest two years available – see Table 17. Haringey showed a loss in both periods.

Table 17: Commercial floorspace change, 2001-04 and 2004-06

Area	% change, 2001-04	% change, 2004-06
England	2.0%	1.1%
London	1.4%	-2.2%
Enfield	0.3%	3.7%
Barnet	1.2%	-1.5%
Haringey	-2.8%	-1.7%
Waltham Forest	0.6%	-4.0%

### Household income levels and trends

The Council has paid to receive detailed household income estimates for recent years, from CACI Ltd. Whilst the proportion of low income households is significantly lower than the Great Britain average it is marginally above the

London average. The following table presents the comparative proportions in four 'cumulative' income bands.

Table 18: Low income household levels at 2005

Income band	GB	London	Enfield
0-5k	5.1%	3.8%	4.0%
0-10k	13.2%	9.6%	10.2%
0-15k	24.3%	18.0%	19.1%
0-20k	36.4%	27.8%	29.6%

The trend in low income households has tended to follow the London trend. The following table shows the relative change in the low income proportions, calculated as: (2005% divided by 2002%) minus 1, expressed as a %.

Table 19: Change in low income household levels, 2002-05

Income band	GB	London	Enfield
0-5k	-5%	-15%	-12%
0-10k	-23%	-29%	-27%
0-15k	-22%	-28%	-27%
0-20k	-19%	-24%	-23%

As shown, Enfield has not seen quite as great a reduction in low income households as the London average, particularly at the lowest end. However, the estimates for Enfield at 2002 may be less reliable than those for London, being produced before the 2001 Census results became available.

Between 2005 and 2007 Enfield's proportion of households receiving under £15,000 reduced by 17.5% compared to 23.7% in London and 22.7% in GB.

In recent years this data has also been supplied with 'equivalisation' – which takes account of variations in household size. The trend in the equivalised data is similar to the unequivalised – see the following table of relative changes in the proportions.

Table 20: Change in low income household levels (equivalised) 2005-07

Income band	GB	London	Enfield
0-5k	-63%	-67%	-63%
0-10k	-30%	-34%	-28%
0-15k	-13%	-14%	-9%
0-20k	-5%	-4%	0%

This tends to confirm the findings from the 2002-05 period that low incomes are not reducing as fast as would be expected from London trends.

## Earnings

Although there is a national sample survey the relatively small size of the sample does make analysis at a borough level of limited use. Between 2002 and 2004 the median earnings of Enfield residents working full time rose by an estimated 7.7%, compared to 7.2% in London and 8.3% in England.

Between 2005 and 2007 Enfield's increase was 4.2%, compared to 5.1% in London and 5.8% in England. However, the difference of the Enfield figures to

the other two could simply be due to sampling error – one cannot be sure that it is either above or below the England figure, for example.

### **Working age client group**

The practice now followed by the Government to measure worklessness is to consider trends in the DWP's 'working age client group'. The key benefits which are currently included in the working-age client group data are:-

- Bereavement Benefit
- Carer's Allowance
- Disability Living Allowance
- Incapacity Benefit
- Severe Disablement Allowance
- Income Support (including Pension Credit for males aged 60 to 64)
- Jobseeker's Allowance
- Widow's Benefit

Over the five years to May 2007 Enfield's caseload increased by 9.5% compared to minus 1.9% in London and minus 3.1% in England. This was the 8<sup>th</sup> highest increase in England. However, over the two years to May 2007 Enfield's caseload decreased slightly, as nationally, though not by as much as the London average –see Table 21.

Table 21: Working Age Client Group claimants, 2005-2007

	% change May05-May07
Enfield	minus 0.8%
London	minus 2.5%
England	minus 0.9%

### **Income Support**

The Observatory team produced a revised Information Briefing on Income Support in May 2007. In terms of the number of claimants this found: *“Over the five years to May 2006 Enfield had the highest percentage increase out of all 408 authorities in Great Britain. The increase appears to be persisting though lessening”*.

Over the two years to May 2007 the Enfield caseload increase was 3.5% which was the 52<sup>nd</sup> highest increase of 408 districts in GB, excluding the Isles of Scilly. The claimant rate worsened from 8.2% at May 2006 to 8.7% at May 2007. However, Enfield's rank position improved slightly from 33<sup>rd</sup> to 35<sup>th</sup> highest in GB. There is probably no one simple explanation as to why Enfield has experienced this change. The availability of suitable and relatively low cost housing in Enfield may well be one increasingly important factor contributing to the trend.

### **Housing Benefit**

There is also a clear upward trend in numbers claiming Housing Benefit, as would be expected from the Income Support data. Over five years, from February 2002 to May 2007, the number increased by 38%, the 4<sup>th</sup> highest increase in England. Over the two years to May 2007 Enfield had the 14<sup>th</sup> highest increase, at 11%. That compares to 2% in London and minus 15% in

England. All of the districts with higher increases had a lower claimant rate than Enfield (at 21.2%) at May 2007. A key factor which may help to explain this change is that Enfield continues to be a relatively low rent area in the London context and it seems plausible that more and more 'outsiders' and housing authorities have increasingly realised this, perhaps over the last decade.

### Council Tax Benefit

The number of households receiving Council Tax Benefit provides a wider measure of low income and wealth due to the inclusion of a savings limit in the eligibility criteria. From February 2005 to May 2007 the number rose by 4.7%, in the bottom half of all English districts for increases. However, Enfield's ranking rose from 66<sup>th</sup> highest to 56<sup>th</sup> highest in England. Its claimant rate at May 2007 was 25.4%.

### Child poverty

This is most regularly measurable by statistics of 'children in benefit claimant families', Enfield has experienced a much greater increase than in London and nationally:

Table 22: Children under 11 in benefit claimant families, 2002-05

	% change May02-May05
Enfield	14.5%
London	3.5%
England	4.6%

Although many areas have had high relative rates of increase (Enfield being only 105<sup>th</sup> in England on percentage change) a significant number will have started from a low level at 2002. When the absolute numeric change is considered, Barnet, Enfield and Waltham Forest appear in 2<sup>nd</sup>, 4<sup>th</sup> and 5<sup>th</sup> places respectively. Whilst the numbers are subject to sampling error the message is clear enough that child poverty is increasing relative to expected trends.

Table 23: Children in benefit claimant families, 2005-2007

	% change May05-May07
Enfield	5.7%
London	0.9%
England	-0.4%

Table 24: Children under 11 in benefit claimant families, 2005-2007

	% change May05-May07
Enfield	7.5%
London	-0.2%
England	-1.6%

The above tables use the DWP 5% sample data and so there is a margin of error to each change. Nevertheless, the sheer scale of difference between Enfield's change and those for London and England is almost certainly significant. This is also borne out by the 100% data which counts claimant households by numbers of children, up to the category of 5 or more children – so this data provides a minimum count of children. This data shows an increase in benefit dependent children (all ages) in Enfield of 2.1% compared to an England decrease of minus 3.3%.

### **Car ownership**

This might be thought of as an indicator of economic growth. However, data on numbers of vehicle licences held shows that most London boroughs have had a relatively low growth in recent years, so it is possible that parking capacity and public transport considerations have had a bearing. It could also be that many other areas, starting from a lower base, are catching up with the affluent. Enfield shows a growth of 5.7% in three years, ranking 10<sup>th</sup> of the 32 London boroughs, compared to a national average of 8.5%.

There is no available update to this.

### **Employment – Enfield as a workplace**

The overall employment trend remains unclear. The official estimates of the numbers of employees show an up-down-up-down trend from 2002 to 2006. The GLA Economics estimates which tend to smooth this data indicate a very slight decrease to 2005. GLA Economics also produce workforce estimates (incorporating self-employed) implying substantial growth in self-employment as their workforce estimates show a significant upturn from 2003 to 2005:

Table 25: Enfield workforce, 2001-05

Year	Enfield workforce
2001	115,171
2002	110,220
2003	108,406
2004	110,240
2005	113,927

SQW have done an analysis of knowledge intensive and high technology sectors, as defined by the European Commission. This shows that whilst these sectors grew by 6% across London, 1998-2003, in North London there was a 1% loss and in Enfield only a 1% gain. Excluding the public sector components from this analysis North London lost 9% and Enfield 19%. This suggests that the loss of some manufacturing sectors had a crucial impact.

### **Self-employment**

The GLA Economics estimates for 2001-05 are shown in Table 26 below:

Table 26: Self-employed, 2001-05

Year	Enfield: self-employed
2001	18,118
2002	16,124
2003	14,940
2004	17,256
2005	21,051

### Sector trends

The latest GLA Economics estimates show the following trends:

Table 27: Workforce changes by sector, 2001-05

Sector	Enfield	London
Primary & utilities	-81%	-27%
Manufacturing	-39%	-21%
Construction	1%	3%
Wholesale	-3%	-12%
Retail	0%	-2%
Hotels & restaurants	20%	9%
Transport & communications	-5%	-6%
Financial services	-35%	-9%
Business services	11%	1%
Public administration	21%	18%
Health & education	18%	14%
Other services	29%	0%

### Employment – the employment rate of residents

Whilst raising the employment rate is a stated Government target, measuring progress at a local level is hindered by the small size of the Office for National Statistics' Annual Population Survey that is used to track the rate. All changes to the rate for Enfield since 2001 will have been within the sampling error for the results. The Enfield rates were:

Table 28: Enfield employment rate, to 2004/05

Year	% of working age population
2001/02	69.1
2002/03	69.4
2003/04	71.3
2004/05	68.8

The latest and revised rates are shown in Table 29:

Table 29: Enfield employment rate, to 2006/07

Year	% of working age population
2004/05	67.3
2005/06	68.4
2006/07	71.8

### Labour market indicators

Given the size and geographic spread of the London labour market, a more robust picture is obtained by considering a wider area. The appropriate area for Enfield is the North London District administered by Jobcentre Plus. This covers Barnet, Enfield and Haringey. Jobcentre Plus's own reporting shows that the North London indicators are not as favourable as the London average. The measures of change reported are set out in the table below.

Measure	North London	London average
Vacancies notified, Aug03-Aug04	-13.8%	-3.1%
Claimant unemployment, May03-May04	-0.4%	-4.2%

Unfortunately, it is not now possible to obtain two year or longer trends for Jobcentre Plus data due to changes in recording practices. The number of unfilled vacancies in Enfield doubled in the 18 months from May 2006 to November 2007, far exceeding the experience of London (28%) and the national average (3%).

Jobcentre Plus assisted 5257 people into work in 2006/07, of which 2341 had been claimants of less than 6 months duration.

### Unemployment

Enfield fared badly in terms of unemployment in the recent past, particularly given the moderately high level it had during the last recession around 2001. Enfield experienced a sharp increase against the London and national trends to 2005: Since then there has been a very encouraging turnaround:

Table 30: Unemployment trends, 2001 & 2002 to 2005 and 2005 to 2007

	% change Sep01-Sep05	% change Sep02-Sep05	% change Dec05-Dec07
Enfield	20.5%	14.9%	Minus 17.5%
London	7.3%	-1.6%	Minus 21.0%
England	-4.5%	-5.0%	Minus 10.6%

For the three years to 2005 Enfield ranked 36<sup>th</sup> worst out of 354 authorities in England. However, if one excludes the authorities with less than 2000 unemployed at 2002 then Enfield ranked 6<sup>th</sup> worst out of 104 and was 3<sup>rd</sup> for the absolute numeric difference in numbers. For the two years to December 2007, Enfield ranked only 253<sup>rd</sup> worst overall – or to put a better way, it was in the best 29% of authorities. For young adults aged 16-24 the improvement has been even better with the absolute number decreasing 24% in the same period.

### House prices

Analysis of Land Registry prices paid data suggests that Enfield has followed the London trend quite closely. Over the three years to September 2005, Enfield's prices for semi-detached and terraced houses rose by 23% compared to 26% in London. There was also a 3% point difference in the overall average price rise, 20% in Enfield and 23% in London. For the year to September 2005 the Halifax House Price Index showed an Enfield increase of

1.0% compared to 2.1% for London. Over the two years to March 2007 the Land Registry data shows Enfield increases of 11.7% for semi-detached, 7.4% for terraced houses and 6.0% overall. Over the two years to December 2007 the overall increase was 15.3% although London's was 22.6%.

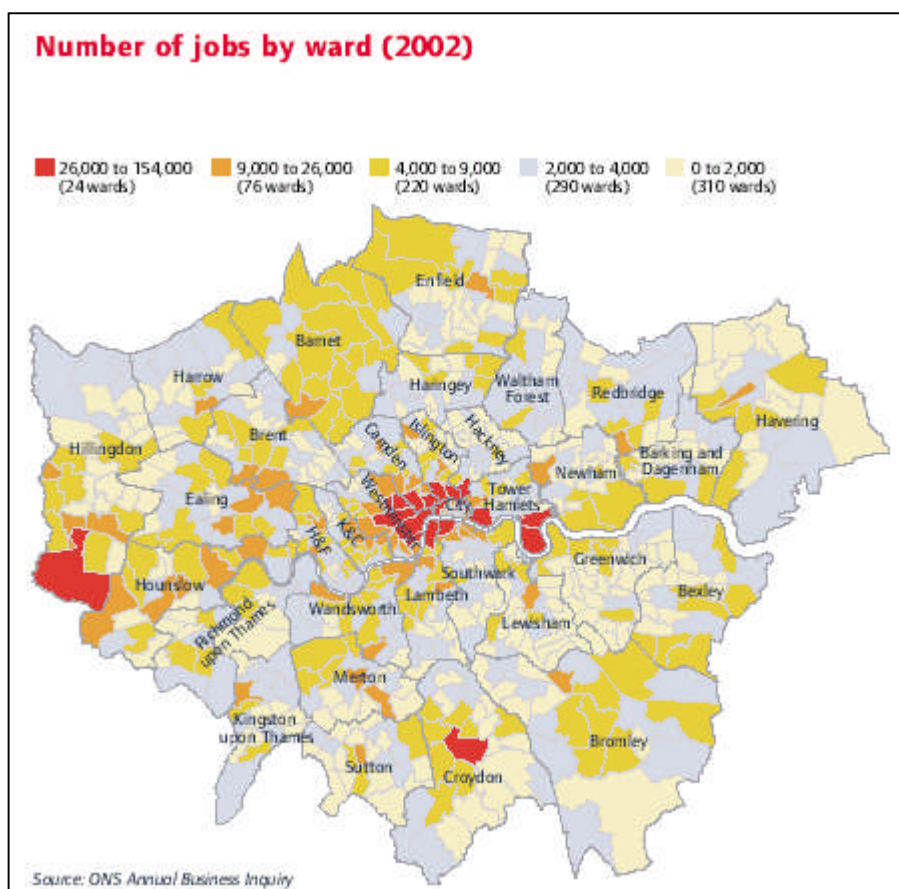
## 5. The Economic Situation

### Economic performance

There is very limited data at borough level. For sectors of London, one of the most extensive set of analyses was done for the London Development Agency. This showed that North London had a gross value added per employee at 14% above the national average in 2000, allowing for the industrial structure of the sub-region. However, this was the lowest of the London sub-regions, the next lowest being East London at 25% above. These figures are estimated and the difference may be smaller or greater than that. Work would need to be commissioned to provide an update on performance although newly available estimates for 2004 put Enfield at 5<sup>th</sup> lowest of the London boroughs for gross value added and 4<sup>th</sup> lowest on a composite productivity index using two other factors.

### Geographic distribution of jobs

An impression gained by the map below is that Enfield has a reasonable level of jobs and is in proximity to the high job density in Barnet.



Map reproduced with the permission of GLA Economics

## Labour demand

As the official figures given earlier indicate, there is a relative wealth of opportunities available. While many Enfield residents will look to parts of central and north London for work, others are seeking work locally and there is some evidence that there is a gap between demand and supply. In early 2008 Reed reported that there were far more sales positions available in Enfield than local candidates to fill them. Conversely there are very few administrative or secretarial jobs as compared to the supply.

## Worklessness

The most reliable indicator remains the data available from the 2001 Census. Combining the numbers unemployed and 'other economically inactive' (not studying, not looking after home or family, not permanently sick, not retired), Enfield had a total of 16850 (8.5% of the total population aged 16-74), ranking 35<sup>th</sup> in England, i.e. in the worst 10% of authorities in the country. Over half that number (8673) were 'other economically inactive', ranking Enfield 24<sup>th</sup> in England.

Current practice is to use DWP's Working Age Client Group as the key indicator of worklessness. Enfield ranked 76<sup>th</sup> in England for the proportion of the estimated working age population, put at 16.4%.

## Unemployment

The official 'claimant count' of the number in Enfield receiving Jobseeker's Allowance at September 2005 was 6,367. Ranking the rate of unemployment (as a proportion of working age population) at September 2005, Enfield was 29<sup>th</sup> out of 354 with Haringey 4<sup>th</sup> and Waltham Forest 17<sup>th</sup>. Thus, conditions in the wider North London sub-region are also poor. At December 2007 Enfield ranked equal 38<sup>th</sup>, Haringey was 9<sup>th</sup> and Waltham Forest was 15<sup>th</sup>. The number receiving Jobseeker's Allowance in Enfield at December 2007 was 5,283.

## Child poverty

On the measure of children under 11 in benefit claimant families, Enfield ranked 32<sup>nd</sup> in England at May 2005. The rate was 32.5% using a denominator of children in Child Benefit claimant families at August 2004. This compared to 30.2% in London and 23.3% in England.

Results from the Indices of Deprivation 2007 (2005 data) putting Enfield at 21<sup>st</sup> worst in England suggest that there is substantial poverty amongst working families. For all children, using the 100% data, the poverty rates at May 2007 were:

Table 31: Child poverty rates, May 2007

	As a % of children receiving Child Benefit (August 2006)
Enfield	28.4%
London	26.2%
England	17.7%

Table 32: Children under 11 poverty rate, May 2007

	As a % of children receiving Child Benefit (August 2006)
Enfield	33.5%
London	28.9%
England	21.6%

Table 32 thus shows an increase in child poverty at least for children under 11. Enfield's rank worsened to 28<sup>th</sup> at May 2007.

### Personal debt

Data for the 2003/04 financial year was made available since the first Monitor. This relates to County Court judgements and shows the aggregate and ranges of values involved in the judgements. Enfield ranked 8<sup>th</sup> of 376 authorities on the proportion above £1000 and 25<sup>th</sup> for the proportion in the highest national decile.

### Housing rents

A London survey of rentals for rooms, bedsits, house shares and studio flats at November 2004 showed that the median rent in Enfield was £73.50 per week. This ranked Enfield the third equal cheapest of the 33 London authorities. At the time of writing there was no such update to give. One indicator of the level of rents in the wider area is the Rent Service's local reference rent. Outside of central and inner London the 'London North Outer' area had the highest reference rent for one bedroom self-contained accommodation in the country, at £135 per week at June 2007. However, an informal assessment by the Rents Service is that Enfield is the cheapest place to live in North London as a whole, only equalled by some parts of Brent and Harrow. Peter Barry Estate Agents report<sup>5</sup> that "*Rental yields...have been chipped back to a level where, if capital growth was discounted, a Landlord would be better off keeping their money in the bank. This is being reflected in a softening of demand from buy-to-let investors over the last couple of years. It seems that Landlords have started to realise that year on year capital growth cannot be guaranteed.*"

### House prices

Enfield's prices are generally lower than the London average. For the July to September 2005 quarter, the average price paid for a semi-detached house was £312,200, compared to £343,500 in London, so 9% cheaper. This was the 14<sup>th</sup> cheapest price out of 32 London boroughs. However, Enfield was 8<sup>th</sup> cheapest for overall average price across all house types.

Over the six months to March 2007 the average price paid for a semi-detached house was £329,000, compared to £367,500 in London, so 10.5% cheaper. This was the 13<sup>th</sup> cheapest price out of 32 London boroughs. However, Enfield was 9<sup>th</sup> cheapest for overall average price across all house types.

<sup>5</sup> Report commissioned by Enfield Council from Peter Barry, Estate Agents and Chartered Surveyors  
[www.peter-barry.co.uk/chartered-surveyors.asp](http://www.peter-barry.co.uk/chartered-surveyors.asp)

### **Housing affordability**

For 2006 a study commissioned by Hometrack showed that Enfield had the 8<sup>th</sup> lowest house price to earnings ratio of the 32 London boroughs, at 4.23 times earnings. The study shows further calculations for younger working households in the 'intermediate housing market'<sup>6</sup>, where Enfield had the 5<sup>th</sup> highest proportion of such households requiring Housing Benefit, at 14.8%. For the same group, Enfield was 10<sup>th</sup> highest for the proportion falling within the total intermediate housing market at 56.1%.

### **Housing need**

The last housing needs survey was conducted in early 2004. This produced an annual shortfall figure of 2916 affordable dwellings, compared to an average annual supply of 685. New and better evidence on need and affordability is awaited in the forthcoming Local Housing Market Assessment.

## **6. The Economic Outlook**

### **The Mayor's Economic Development Strategy**

The Strategy considers each sub-region of London, one being North London, covering Barnet, Enfield, Haringey and Waltham Forest. The stated view of North London in the Strategy is:

*North London has had mixed economic success recently – with strong jobs growth in Barnet but decline in the manufacturing areas of the Upper Lea Valley. It sits at the southern end of the London-Stansted-Cambridge corridor, identified by the Government in its Sustainable Communities Plan as a key area for development to meet housing needs. This highlights the importance of addressing the regeneration and development of the Upper Lea Valley. The priorities here are to enable local residents to access and compete in the London labour market and to engage them in economic regeneration opportunities, to help develop sustainable homes and communities with adequate transport and other infrastructure, strengthen town centres and enhance strategic industrial sites in the area. The London Plan envisages 47,000 new homes and 26,000 additional jobs, identifying three opportunity areas (Upper Lea Valley, Tottenham Hale and Cricklewood/Brent Cross), three areas for intensification (Mill Hill East, Colindale and Haringey Heartlands/Wood Green) and 10 strategic employment areas.*

### **The North London Sub-Regional Development Framework**

This proposes:-

- At least 60,000 dwellings, 1997-2016
- 26,000 jobs (subject to revision)
- 100-160,000m<sup>2</sup> of comparison goods retail floorspace, 2001-2016

Enfield Council has submitted to the Mayor of London that the Framework does not provide for sustainable growth, citing, on the information available,

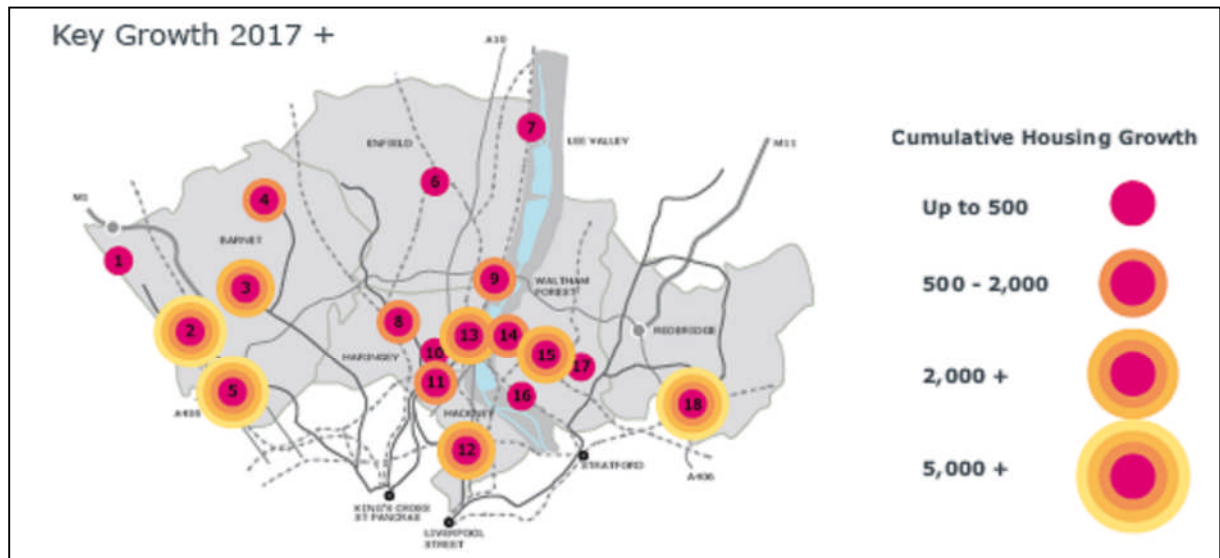
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<sup>6</sup> Those unable to purchase at lower quartile house prices for two and three bedroom dwellings

an imbalance between higher population growth and the lower level of employment, services and infrastructure growth likely to occur. It is also concerned about the provision of utility infrastructure that will be needed in a number of the 'opportunity areas'.

**North London Development and Investment Framework**

Since the Sub-Regional Development Framework was produced the London Development Agency has published a North London Development and Investment Framework. This highlights the envisaged growth in adjoining boroughs as shown by the map below of housing developments.



It is also somewhat surprising that the same document does not acknowledge Central Leaside as a 'Key Growth Location' – it is merely an 'Other Growth Opportunity'. This is clearly at odds with the current thinking of the North London Strategic Alliance which is heavily promoting the Upper Lee Vision.

**Commercial development potential**

Developments under construction or with permission

London boroughs assess the potential development of major planning permissions (over 1000 square metres). At December 2005 Enfield had the major permission development potential shown in the following table.

Table 33: Major development potential in planning permissions, December 2005

Category	Floorspace (sq.m.)	Rank of 32 London boroughs
Retail	32381	10 <sup>th</sup>
Industry & offices	88691	18 <sup>th</sup>
Warehousing & storage	103216	1 <sup>st</sup>

At mid-2007 the potential had changed to the positions shown in the following table:

Table 34: Major development potential in planning permissions, mid-2007

Category	Floorspace (sq.m.)	Rank of 32 London boroughs
Retail	30758	9 <sup>th</sup>
Industry & offices	72678	19 <sup>th</sup>
Warehousing & storage	88630	2 <sup>nd</sup>

#### Vacant land and premises

The Council maintains a land use database which shows the last surveyed land use with precise measures of land areas and approximate measures of floorspace for the great majority of commercial buildings. At December 2005, there was a possible total of 74 hectares of vacant land (not built upon) in the whole Borough. However, a substantial proportion of that is subject to restrictive planning policies and the most usable amount is contained in:-

- a handful of large sites totaling about 16 hectares around the A406 and A1055 junction in Edmonton;
- vacant plots at Innova Park, Enfield Lock totaling about 12 hectares of which 6.4 hectares will be developed with housing and a school

In the same month there was over 185,000 square metres of vacant floorspace, on the basis of surveys in 2004 and known changes since. North London Limited had knowledge of a total of 148,000 square metres of vacant buildings on the market at January 2006. There was also nearly 62,000 square metres of land. [At November 2007 the comparable total had risen to 201,000 square metres with a further 14,600 square metres of land or open storage. The largest sites available in January 2008 were Link 25, located near Junction 25 of the M25 \(33,444 square metres\) and the Atlas site on Meridian Way \(18,000 square metres\).](#)

The North London Employment Land Study estimated the following levels and proportions of vacant or derelict land and buildings amongst total industrial land stocks:

Table 35: Industrial vacancy levels

Area	Vacant/derelict land/buildings (ha)	% of total industrial land studied
Enfield	65.0	19.5
Barnet	4.5	12.0
Haringey	11.4	11.0
Waltham Forest	14.9	12.9

[There has been no update to the above.](#)

[The latest research by the Estates Gazette, Property Week and Glenny all show that the market for industrial and warehousing units in the Enfield area is fairly healthy. Supply of premises, including larger offices, is good in comparison to the rest of North London and parts of Hertfordshire.](#)

#### **Major development sites**

In Enfield:-

Innova Park;

Central Leaside Business Area;

Link 25 site

- these are the main sites within the Upper Lee Valley Opportunity Area (which excludes Tottenham Hale), an area that, in total, could provide 10,000 jobs

In Barnet:-

Cricklewood/Brent Cross (22,000 jobs) including a new town centre

In Haringey:-

[Tottenham Hale and Haringey Heartlands \(900 jobs\)](#)

In Waltham Forest

Walthamstow (2200 jobs – [but note this has not been reviewed](#))

Blackhorse Lane (1000 jobs)

In Broxbourne:-

Park Plaza (between M25 and A121): printing plant for News International [now near completion](#);

Essex Road, Hoddesdon: 88,000 sq.m. of office/industrial/warehousing floorspace

In Harlow:

[A total of 13.7ha of employment land is designated in the local plan which also identifies significant redevelopments in the town centre.](#)

The more immediate developments already arising in Enfield are:-

- Enfield Town: Palace Xchange shopping centre (14,000 sq.m. of shops; 6,038 sq.m. leisure and cultural space) – [shops now completed](#)
- Edmonton Green: shopping (21,840 sq.m.; net increase c4,000), leisure (9,575 sq.m.), health and residential development – [now only awaiting the 2<sup>nd</sup> retail phase including an Asda supermarket](#)
- Edmonton: regional athletics centre (8,310 sq.m.) – [completed](#)
- Enfield Lock: City Academy (10,500 sq.m.) – [completed](#)
- North Middlesex Hospital (expansion of patient facilities)

### **Development and commercial property market**

[A study on the potential for further retail development has now been completed<sup>7</sup>. The consultant's projections "suggest there is scope for additional comparison goods retail development within the Borough up to 2013. The long term projections beyond 2013 should be treated with caution". The same study also considered offices. This part of London has always had a poor image for office development and relocations and there is no reason to think that this will change in the foreseeable future. The major commercial area of Enfield is Brimsdown and this is seen as an industrial location which in turn serves to attract industrial business but will deter clerical and headquarter enterprise \(not least because of very few office premises but companies are even reluctant to invest in a design and build prospect other than distribution\). In regard to industrial property, market reports show quite healthy activity but new builds will probably continue to focus on distribution and logistics uses. As indicated above, perhaps the most significant new trend is the growth in leisure uses. There is a lack of large capacity hotel accommodation in Enfield](#)

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<sup>7</sup> London Borough of Enfield – A Study of Town Centres; Nathaniel Lichfield & Partners Ltd, March 2007

– remedying this would be beneficial in providing a service to business and a cheaper accommodation venue for the visitor economy than central London .

### **Sector potential**

Research by SQW has shown a low base in the knowledge intensive and high technology sectors. In Enfield these sectors represented 46% of total employment in 2003 compared to 60% across London. This may be seen as an opportunity for development. In regard to the sectors in Enfield which are already 'over-represented' and which could therefore be regarded as strong, the service sectors which stand out are education and health.

### **The Olympics factor**

There are naturally high hopes that Enfield will benefit from the 2012 Olympics centered at Stratford in London's Lower Lee Valley. The impact could be twofold:-

- Businesses forced to relocate or dissuaded from further investment in the area affected by developments for the Games;
- Business growth to provide for the construction projects and running of the Games – but these will be highly competitive across the UK and possibly global dependant upon the contract.

Enfield is well placed to compete for the existing businesses that either have to move or choose to move.

### **Labour demand**

*Reed has reported that “..it is unlikely that the current and future developments in Enfield will materially change the borough's employment profile. There is little evidence of a move towards white-collar or office based roles, with the major developments involving instead retail or light industrial positions. While these developments will of course increase the volume of job opportunities in Enfield, they may well serve to reinforce recent trends in the growth of elementary trades.”*

*Views received on behalf of new enterprises suggest that recruitment levels will be as now and that there are no major recruitment problems envisaged.*

### **Employment projections**

There are two sets of projections currently being used by research and planning officers:-

- GLA Economics
- PACEC

These show a very great difference in the trend from 2001 to 2016 for the North London area in total. GLA Economics' projections show a 1% increase whilst PACEC's show a 17% increase. By sector, the two sets agree that the fastest growing sectors will include:-

- Property and renting
- Professional business services
- Education

There is a marked divergence between the projections for industrial and warehousing employment. GLA Economic's show a fall of –19.3% compared to PACEC's –0.3%.

Employment projections for smaller areas such as London boroughs are inevitably even more uncertain. The latest GLA Economics projections show Enfield as having the 6<sup>th</sup> lowest increase of the 32 London boroughs over both 10 and 20 years from 2006, at 2% and 6% respectively. The growth rate projected for Haringey is more than triple that for Enfield; for Barnet it is more than double. However, in comparison to the changes projected in economically active people, Enfield may fare relatively well compared to the boroughs likely to attract substantial housing growth or which will otherwise have working age population growth.

### **The skill base**

Some employers will be particularly concerned with the skill base of residents, particularly in the academic performance of those who will be leaving schools, higher and further education. Businesses will be most concerned at employing staff capable of performing the job and then paying a market wage rate. As Enfield is very accessible by car and mainline railway it has a large commuter radius so Enfield residents can be competing for Enfield jobs with residents from Hertfordshire, Essex and Buckinghamshire, as well as other London boroughs.

A National Employer Skill Survey in 2006 found 30% of firms in North London experienced low numbers of applicants with the right skills. For business service firms a 2007 survey in Enfield found 64% experienced low numbers of applicants.

### **Local business perspective**

The Enfield Business and Retailers' Association is concerned about the future of local town centres, citing:-

- Competition from out-of-town centres
- Major town centre developments having a trading impact whilst they are under construction, although regeneration is considered essential
- Online shopping, particularly affecting small, independent traders
- The availability and pricing of customer parking in or near to the shopping areas

### **The housing market**

Peter Barry Estate Agents report<sup>8</sup> that:

*“With buy-to-let investors in retreat, and prices stable at best, first time buyers should find their options increasing in the next year or two. More generally, we would appear to be in for an extended period of much slower activity and flat prices. The two recent interest rate rises have done little to lift the sentiment of buyers. While the market is flat there will be no sense of urgency.”*

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<sup>8</sup> Report commissioned by Enfield Council from Peter Barry, Estate Agents and Chartered Surveyors

[www.peter-barry.co.uk/chartered-surveyors.asp](http://www.peter-barry.co.uk/chartered-surveyors.asp)

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## APPENDIX 1

### PUPIL CENSUS ETHNIC BREAKDOWN, JANUARY 2007

for the 5-15 age group

The following table was constructed using the Office for National Statistics' (ONS) ethnic group classification. However, readers should note that the numbers in the table are not comparable to statistics from ONS data such as the 2001 Census because of the limited options for respondents (i.e. those groups given in the table).

ETHNIC GROUP	no.	%
White: British	11869	33.4%
White: Irish	482	1.4%
White Other: White	7993	22.5%
Mixed: White and Black Caribbean	677	1.9%
Mixed: White and Black African	1513	4.3%
Mixed: White and Asian	335	0.9%
Mixed: Other Mixed	1610	4.5%
Asian or Asian British: Indian	886	2.5%
Asian or Asian British: Pakistani	279	0.8%
Asian or Asian British: Bangladeshi	893	2.5%
Asian or Asian British: Other Asian	759	2.1%
Black or Black British: Black Caribbean	2504	7.0%
Black or Black British: Black African	3239	9.1%
Black or Black British: Other Black	493	1.4%
Chinese or Other Ethnic Group: Chinese	146	0.4%
Chinese or Other Ethnic Group: Other Ethnic Group	1854	5.2%
	35532	100%

Note: excludes those who refused or were otherwise not obtained

The White: Other White group includes three large sub-groups:- Turkish (7.4%), Greek Cypriot (5.1%) and Turkish Cypriot (3.4%).

The Black or Black British: Black African group includes four large sub-groups:-

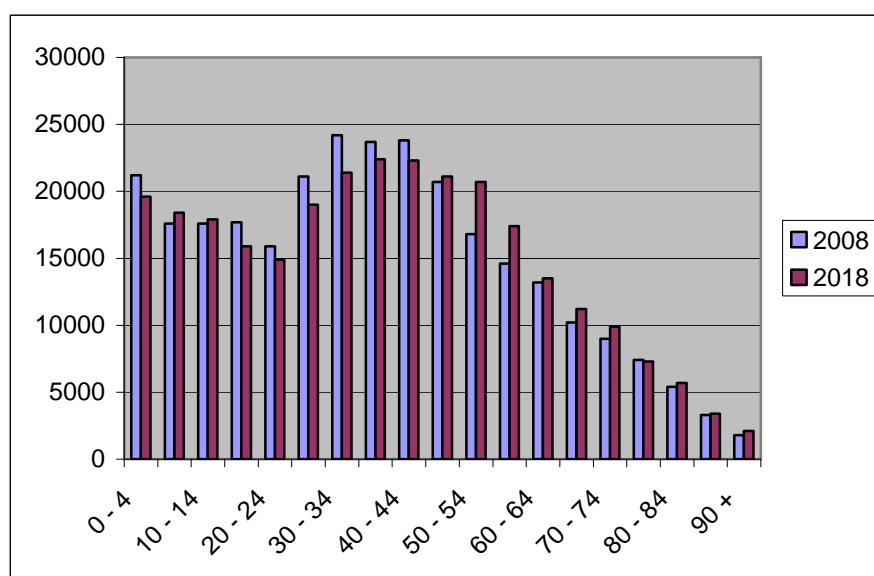
Somali (3.6%), Other (2.9%), Nigerian (2.4%) and Ghanaian (1.9%)

## APPENDIX 2

### POPULATION PROJECTIONS

Age	2008	2018	change
0 - 4	21200	19600	-8%
5 - 9	17600	18400	4%
10 - 14	17600	17900	2%
15 - 19	17700	15900	-10%
20 - 24	15900	14900	-6%
25 - 29	21100	19000	-10%
30 - 34	24200	21400	-11%
35 - 39	23700	22400	-5%
40 - 44	23800	22300	-6%
45 - 49	20700	21100	2%
50 - 54	16800	20700	23%
55 - 59	14600	17400	19%
60 - 64	13200	13500	2%
65 - 69	10200	11200	9%
70 - 74	9000	9900	9%
75 - 79	7400	7300	-1%
80 - 84	5400	5700	5%
85 - 89	3300	3400	4%
90 +	1800	2100	14%
Total	285400	284100	0%

Age structure: 2008 and 2018:



Source: GLA 2007 Round of Demographic Projections – Low variant

### APPENDIX 3

#### THE SOCIAL SITUATION – SELECTED STATISTICS

Population at mid-2006	285,300
Long term ill population at mid-2007, using 2001 Census age specific rates of prevalence	45,500 (16.0%)
Disability Living Allowance claimants at May 2007	10,540 (3.7%)
Carers (people who provide unpaid care) at 2001	24,400 (8.9%)
Social Grade AB at 2001 (share of population)	22.5%
Students resident at 2001	18,450
Without any qualifications (proportion of population aged 16-74) at 2001	28.4%
BME (non White British) population at mid-2007	135,400 (47.5%)
BME (non White British) school population aged 5-15 at January 2007 (resident pupils in Enfield state schools)	23,663 (66.6%)

### APPENDIX 4

#### THE ECONOMIC SITUATION – SELECTED STATISTICS

Income Support claimants and 'claim rate' (at May 2007, as a % of working age population at 2006)	15,730 (8.7%; 27 <sup>th</sup> highest in England)
Unemployment rate (JSA claimants at September 2007 as a % of working age population)	6,173 (3.4%; 29 <sup>th</sup> highest in England)
Household income level – median at 2007	£30,836
Area comparators:-	
London	£33,083
GB	£28,383
Low income households – proportion with an income less than £15,000 at 2007	15.8% (2.1% points above London)
Children aged under 11 in benefit claimant families at May 2007	14,400 (33.5%, 23 <sup>rd</sup> highest in England)
Earnings of full time workers – median at 2007	£26,551 (7.7% below the London median)
Workforce (working at workplaces in Enfield) at 2005	92,876 Employees 21,051 Self-employed
Labour force (resident economically active) at 2007	125,300 (72.3% of working age population)
Area comparators:-	
London	75.0%
GB	78.5%
VAT registrations at 2006	7,345