

# Haringey Business Survey 2023 Final Report – Key Stats Summary

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# Section 1: The Survey

# Summary of Recommendations

Based on the findings and conclusions outlined in this report, the following recommendations are proposed.

**Recommendation 1:** Focus groups with representatives from the business community.

**Recommendation 2:** Targeted and frequent communication with businesses

**Recommendation 3:** An accessible, dedicated point of contact for businesses

**Recommendation 4:** A dedicated Business Forum (or several forums)

# The Survey

## The Research Brief

Haringey Council commissioned The Means to design and implement a comprehensive business survey, gathering responses from a statistically relevant sample of businesses within the borough.

The study aimed to gather granular business intelligence to inform the future direction of strategic policy and business support programmes, as well as gather demographic data on Haringey's business owners.

The data gathered provides a level of insight to enable more nuanced policy creation and implementation which better reflect the diversity of enterprises within the borough and the wide range of their experiences and needs.

The findings are intended to inform Haringey Council's forthcoming Inclusive Economy Framework: Opportunity Haringey.

### Key objectives of the research:

- To build an accurate picture of the demographics of business owners in Haringey (e.g., sex, ethnicity, disability). This data was gathered in accordance with Haringey's Equality Monitoring Guidance
- Understand the impacts of Brexit, Covid-19, and the Cost-of-Living Crisis on business performance and confidence about the future
- Gauge awareness and opinion of Haringey Council's existing business support services and identify areas of need for future support, as well as gather demographic data on Haringey's business owners
- Signpost existing support and explore appetite to participate in the co-design of future initiatives
- Opportunity to ascertain preferred communication method and capture contact details.

# The Survey

## Survey Design

The survey adopted a quantitative approach, taking the form of a multiple-choice questionnaire to enable statistical analysis. A small number of open text fields were included to allow opportunity for more detailed comments. From an initial topic guide, questions were developed in collaboration with Haringey Council officers.

The questionnaire comprised a total of 36 questions distributed across the following sections:

- **“About your business”** - to categorize businesses based on location, sector, size and number of years in operation;
- **“Business Health Check”** - to understand the impacts of Brexit, Covid-19, and the cost-of-living crisis on business performance and confidence about the future;
- **“Haringey Business Support”** - to gauge awareness and opinion of Haringey Council’s existing business support services;

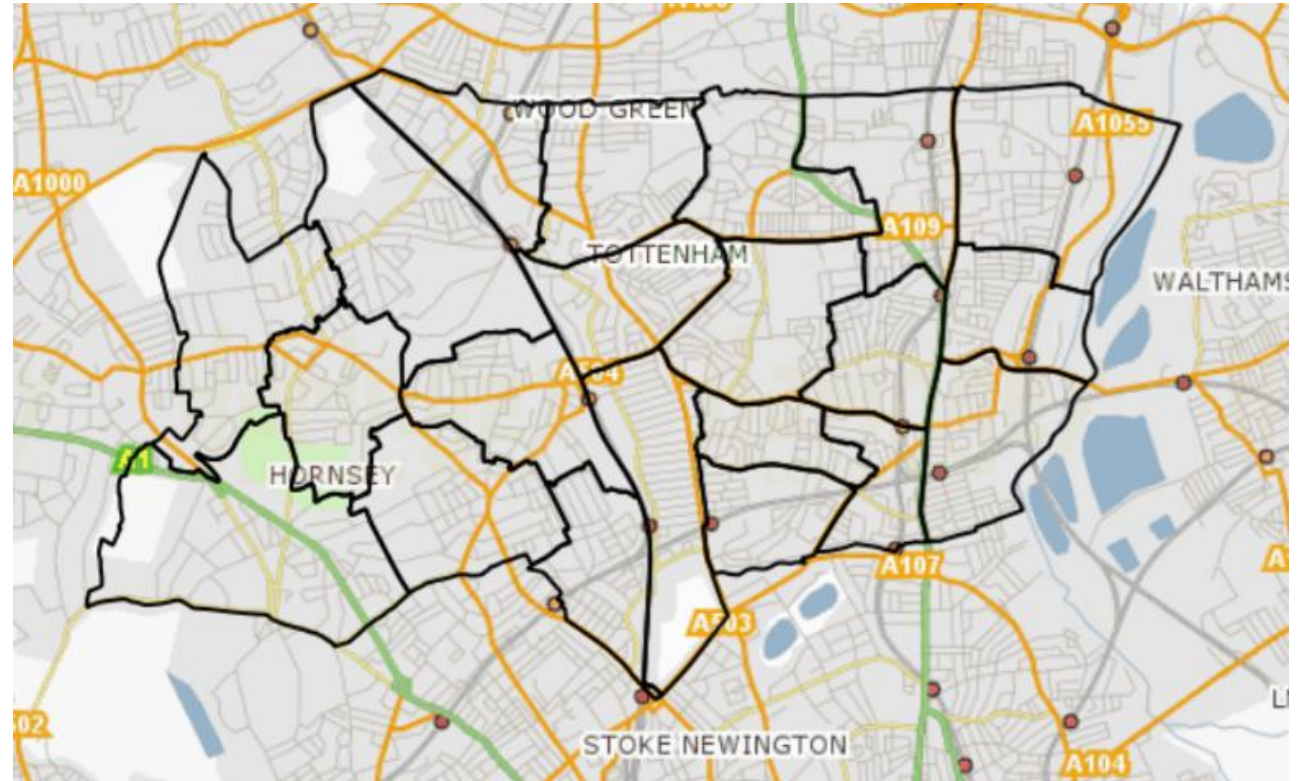
- **“Business Support – future needs”** - to identify areas of need for forthcoming support;
- **“Communication and future contact”** - to gauge awareness of London Borough of Haringey’s existing channels of communication and to ascertain preferred communication method;
- **“About you”** - to build a picture of the demographics of business owners in Haringey (e.g., sex, ethnicity, disability) data gathered in accordance with Haringey’s Equality Monitoring Guidance;
- **“Keeping in touch and final comments”** - to gauge appetite to participate in the co-design of future initiatives and capture contact details.

# The Survey

## The Study Area

The study area encompassed the entirety of Haringey Borough, focusing on areas with highest business density; the 12 town centres plus the borough's industrial estates, namely Peacock Industrial Estate, Crusader Industrial Area, Leaside, Milmead, and St. George's Industrial Estates.

Efforts were made to collect equally distributed responses from across the borough of Haringey, to achieve an appropriate balance and representation across sectors and size of business, as well as allow for accurate geographically oriented insights.

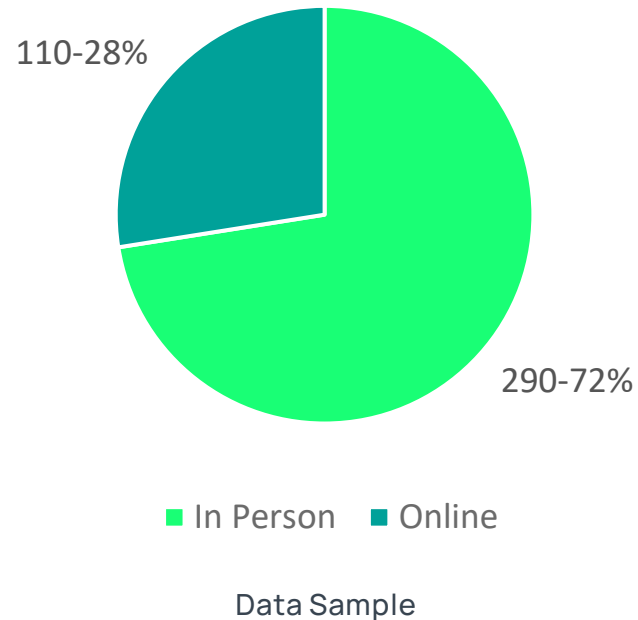


The Study Area

# The Survey

## Overview

A total of 400 surveys were completed between June and August 2023, in accordance with The Means' 4S methodology to ensure a representative data sample.



### Survey techniques:

- Online survey – the goal was that every business had an opportunity to participate. Promoted through Council social media channels, business bulletin email and distributed via local networks. Our methodology was supported by distributing leaflets which advertised the survey.
- In-person telephone interviews – pre-arranged in addition to cold calls using an agreed 'script'.
- Walk-ins – implemented on a 'next available respondent' basis, which ensures a random sample of respondents and avoids any bias.
- Responses were monitored in real-time against a set of criteria to achieve a sample reflective of the business population in Haringey. Outreach targeted specific sectors and locations.
- The survey was created using Microsoft Forms and was available in the languages of English, Spanish, Turkish, Polish, Bulgarian and Somali. Provision was available for translation into other languages if required.



## Section 2: Findings

# Understanding Haringey's Business Population

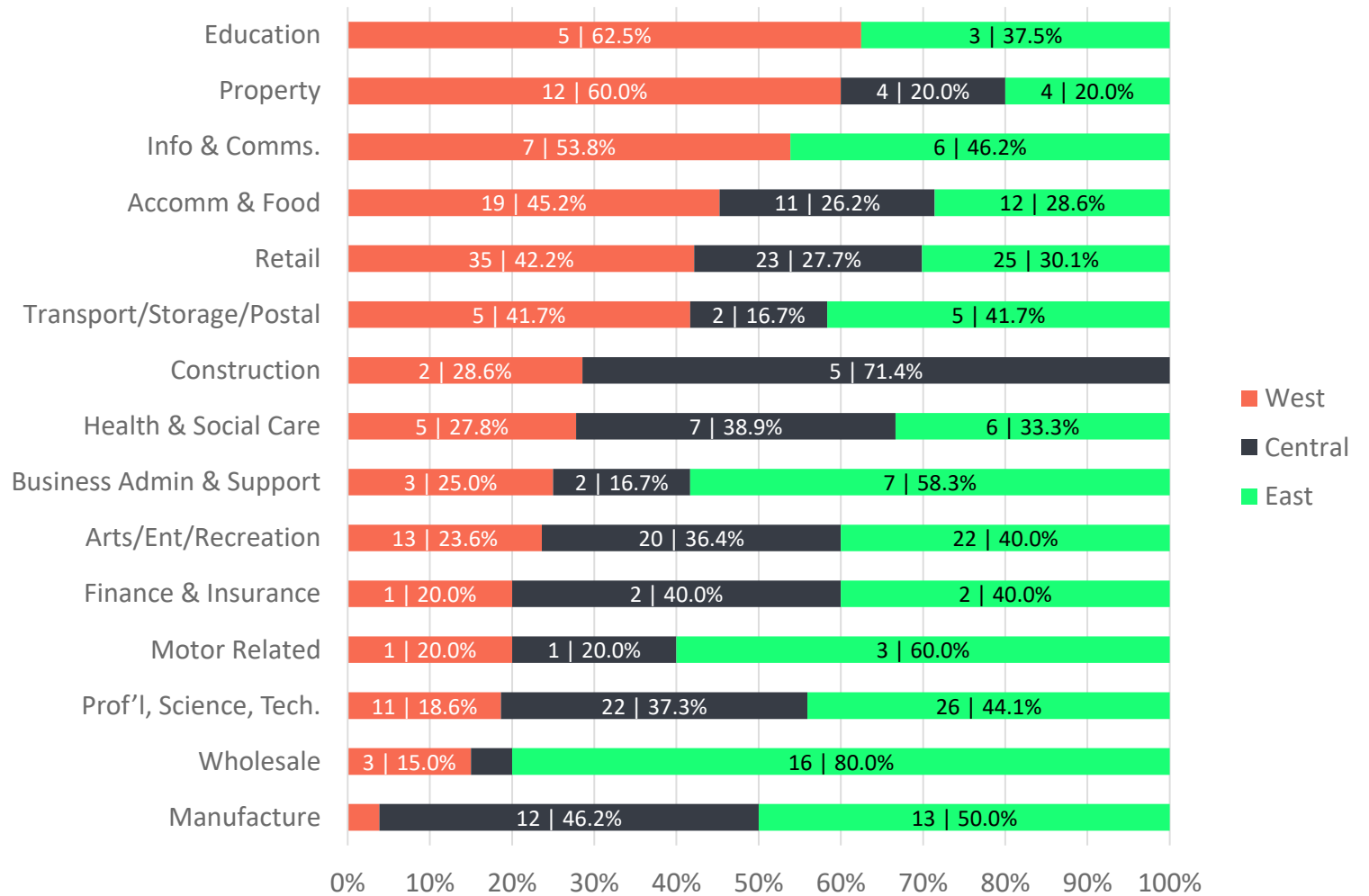
# Type of Business by Location

This graph shows the geographical distribution of respondents across the borough by sector.

Responses suggest a high concentration of Wholesale (80%), Motor Related (60%), Business Admin. and Support (58.3%) businesses in the East. More than half of respondents from the Education sector are in the West of the borough (62.5%).

Responses from the Central part of the borough indicate a diversity of sectors. The sectors most represented are Construction, Manufacture, and Finance and Insurance, all above 40%.

Sample size for Construction, Professional, Scientific and Technical, Business Admin. and Support, Information & Communication sectors is not significant to draw reliable conclusions.



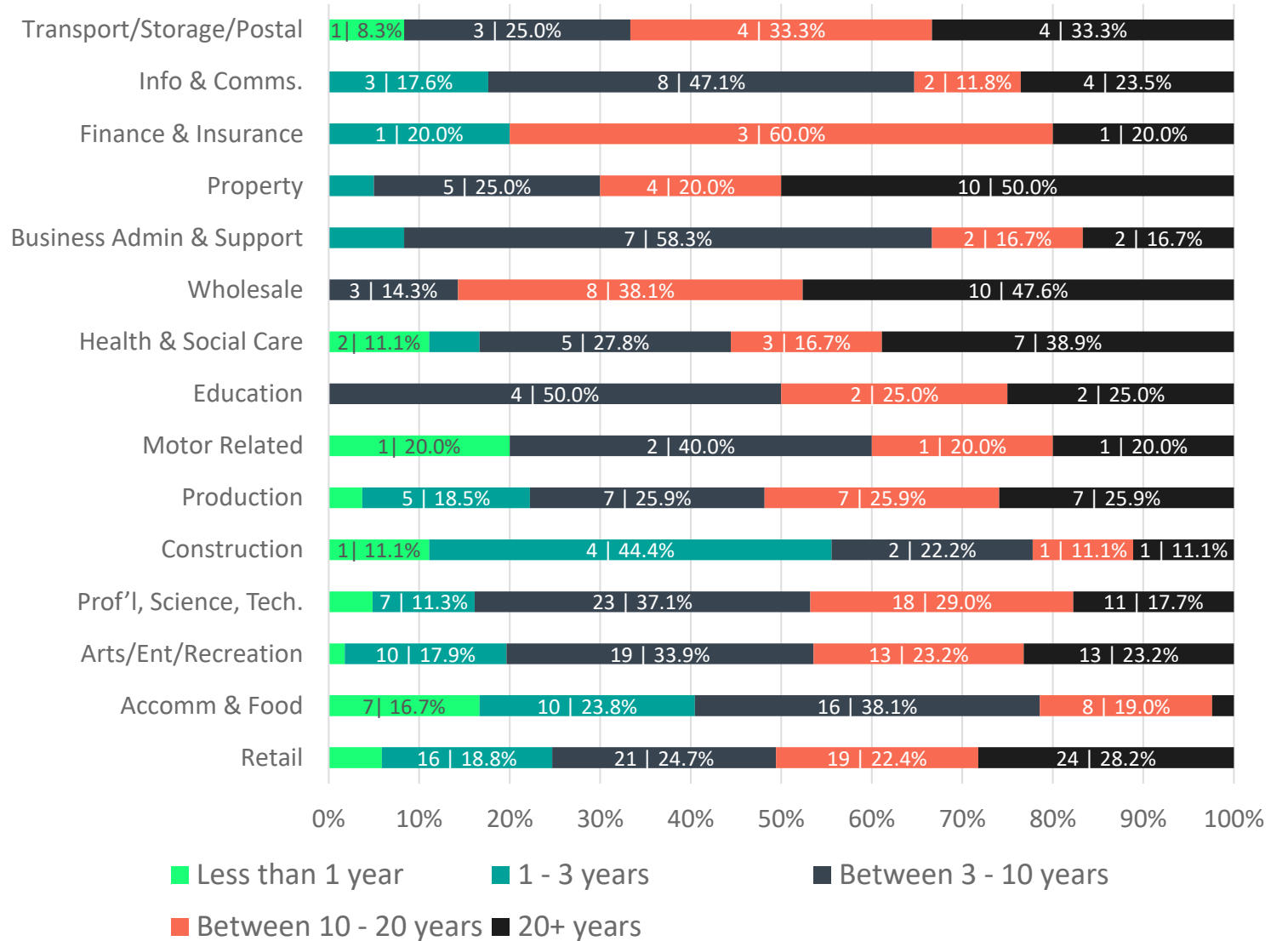
# Number of Years Operating by Sector

This graph shows the number of years businesses have been operating in Haringey, cross-tabulated with sector.

Of the 400 respondents, 311 have operated in the borough for 3 years or more.

Wholesale was one of the most established industries. 85.7% of respondents from that sector reported operating for 10+ years; the remaining 14.3% between 3-10 years. Following was Finance and Insurance, with 80% of businesses operating for 10+ years.

Sample size for Construction, Professional, Scientific and Technical, Business Admin. and Support, Information & Communication sectors is not significant to draw reliable conclusions.



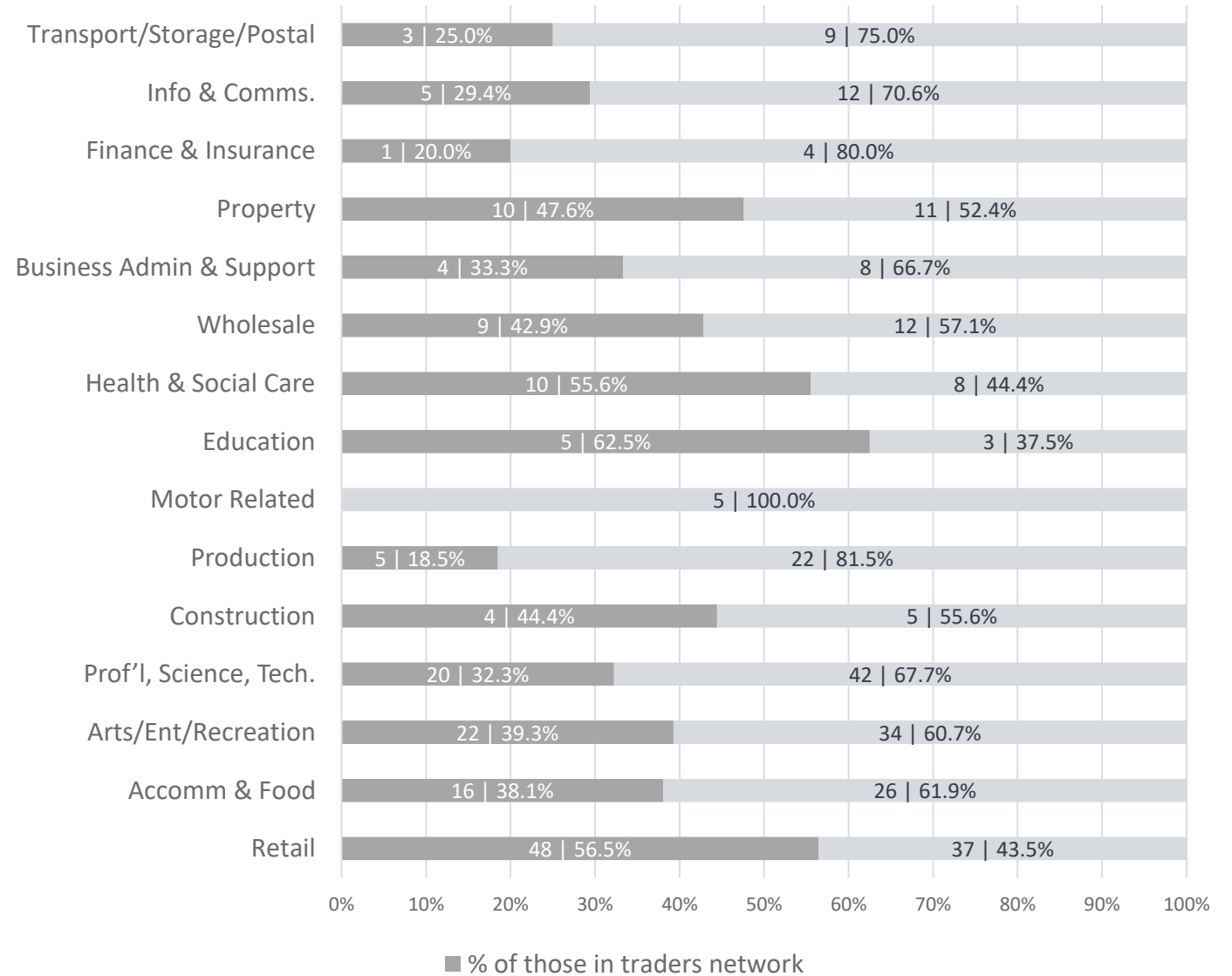
# Percentage of Businesses in Traders' Networks

Education (62.5%), Retail (56.5%), and Health and Social Care (55.6%) are the top three sectors of respondents who reported participating in a traders' networks or forums.

Haringey Council's Town Centre Team provides support to several town centre trader forums, which have a strong level of membership. As does the Industrial Estate Network.

Wood Green Town Centre businesses also contribute to an annual BID levy which funds the membership organisation to deliver improvement projects and advocate on businesses' behalf.

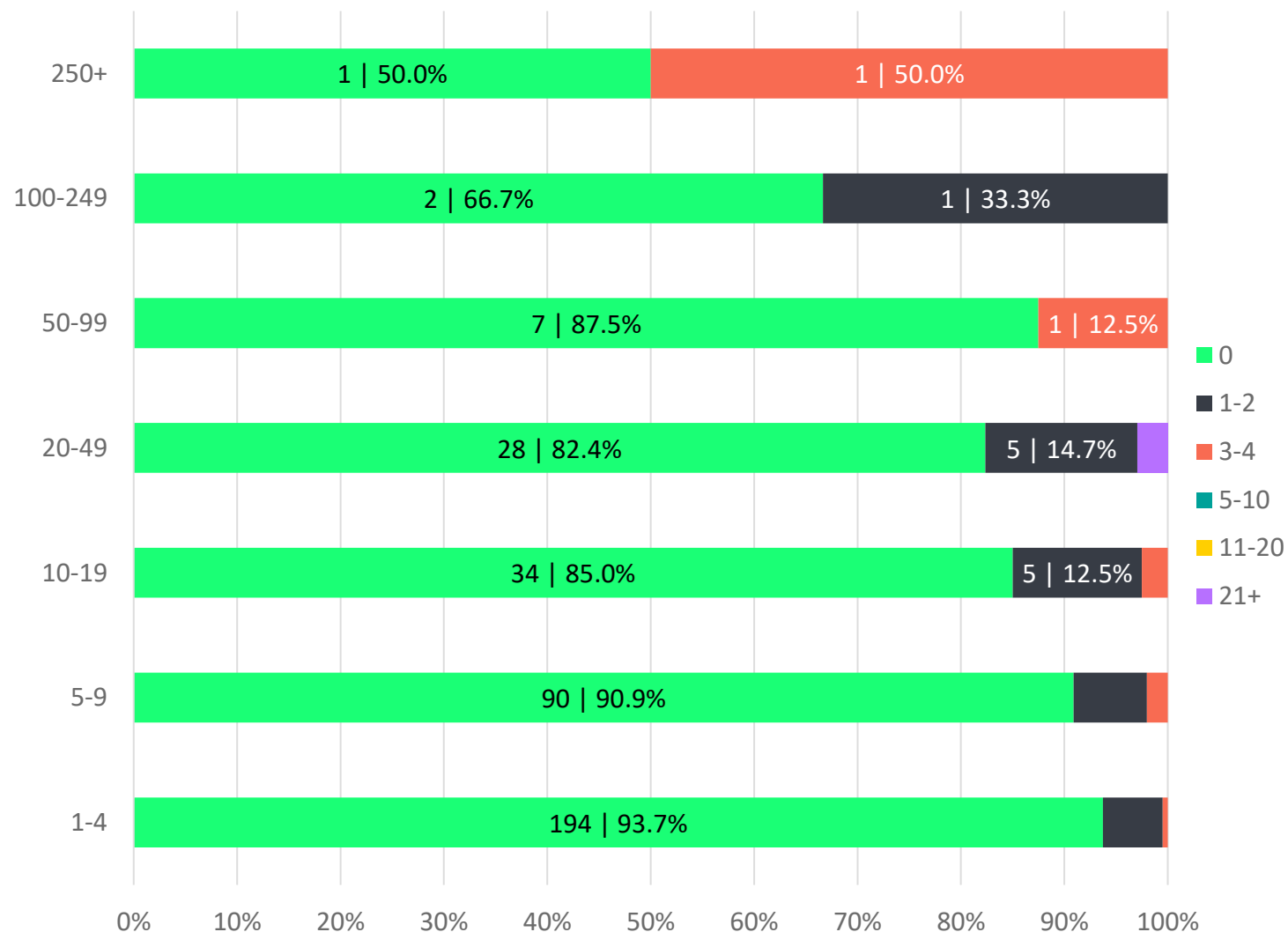
Sample size for Construction, Professional, Scientific and Technical, Business Admin. and Support, Information & Communication sectors is not significant to draw reliable conclusions.



## Number of Apprentices Employed - by Business Size

The size of the business has shown to be directly related to the percentage of companies that employ apprentices. The larger the business, the more likely they are to employ apprentices.

The exception is within companies with 50-99 employees, which have a smaller number of apprentices in relation to companies with 10-49 employees.

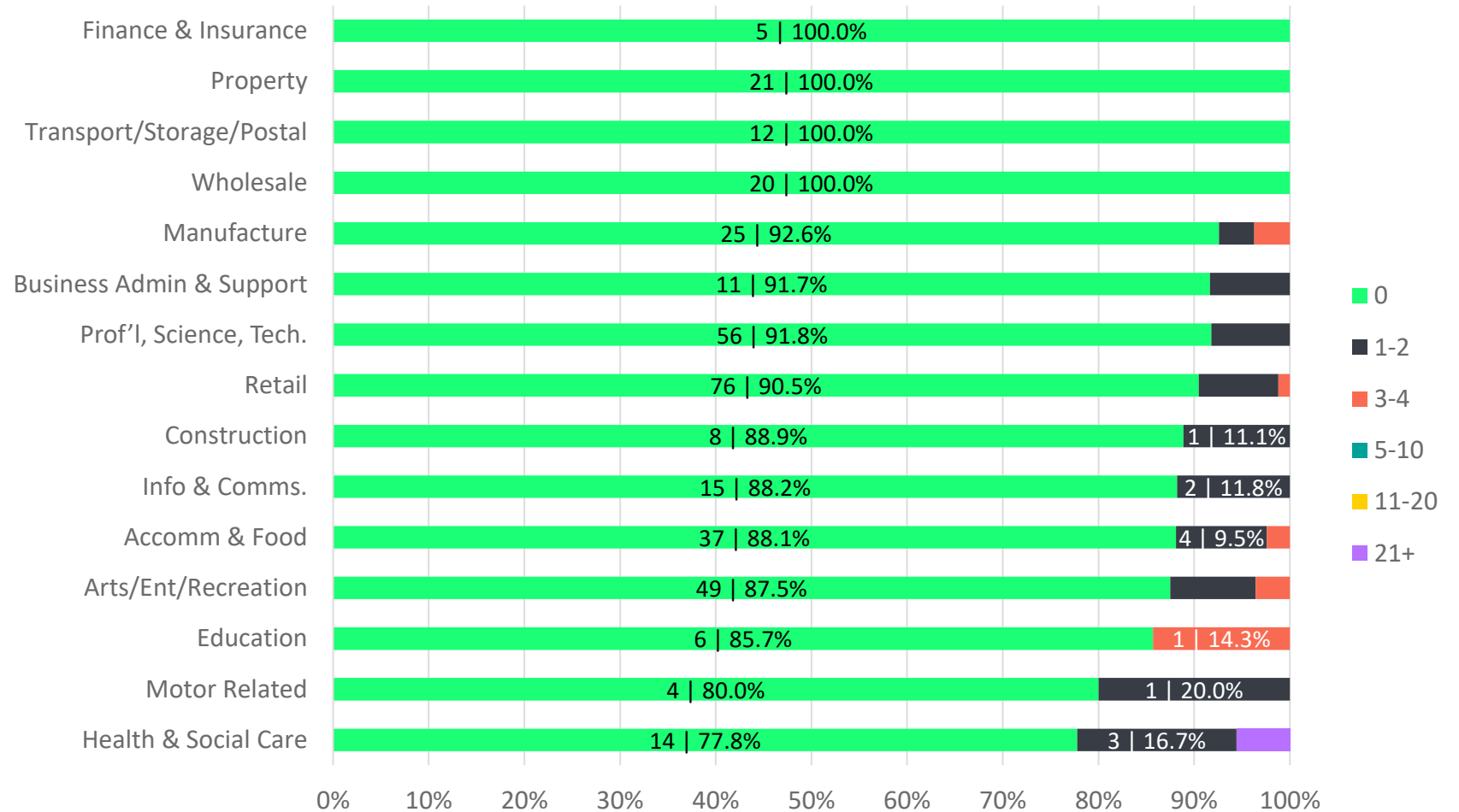


# Number of Apprentices by Sector

The sector with the most apprentices employed is Health & Social Care (22.2% of companies have apprentices).

This is also the sector with the highest cumulative number of apprentices, with one company employing more than 21 apprentices. These findings are not in contradiction with the London scenario, with the Health, Public Services and Care sector reporting a high number of apprentices in comparison to other sectors.

Source: [London Apprenticeships Mid-Year Update 2022/23](#)

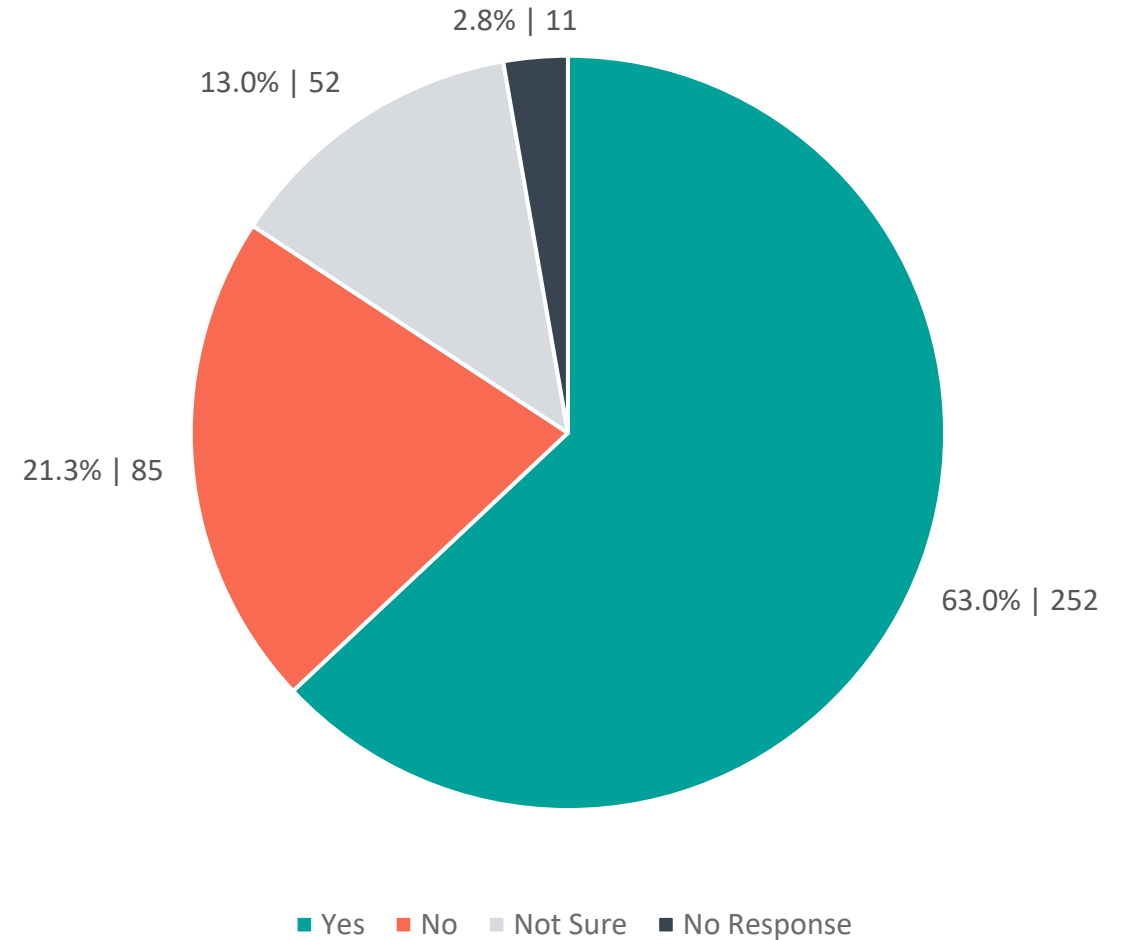


# Businesses Paying London Living Wage

Businesses were asked whether they pay employees the London Living Wage of (LLW).

Three times more businesses reported that they do pay LLW in comparison to the 37% who reported that they either do not pay LLW or were unsure. A small number of respondents didn't respond to the question as can be seen in figure 8 opposite.

13.8% of businesses paying LLW to their employees declared that they are LLW Accredited. That represents 8.7% of the total respondents to the survey.





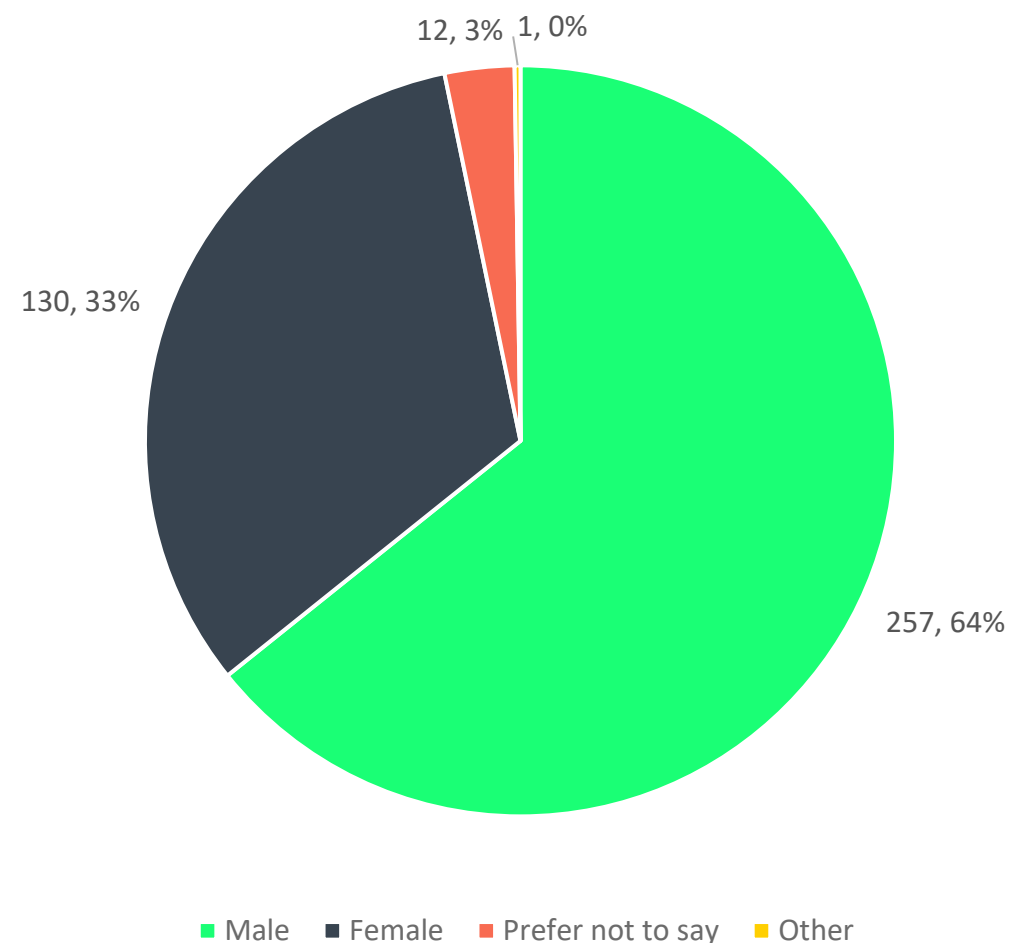
## Respondent Demographics

## Sex of Respondents

33% of respondents to the Haringey business survey were female. That number is below the general population demographic statistics in the borough, since more than half (51.9%) of Haringey's population identify as female ([Haringey Census 2021](#)).

On the other hand, the proportion is higher than UK and London statistics on female-led SMEs (meaning that they were either led by one woman or by a management team of which a majority are women) These represent approximately 20% of businesses in the country ([UK Business Statistics 2021](#)), and 18.6% in London ([The Gender Index 2023](#)).

The Haringey figure is more closely comparable with the proportion of female business owners in the UK according to research by FSB, where around 30% of respondents were women ([The Federation of Small Businesses; The Rose Review of Female Entrepreneurship 2019](#)).



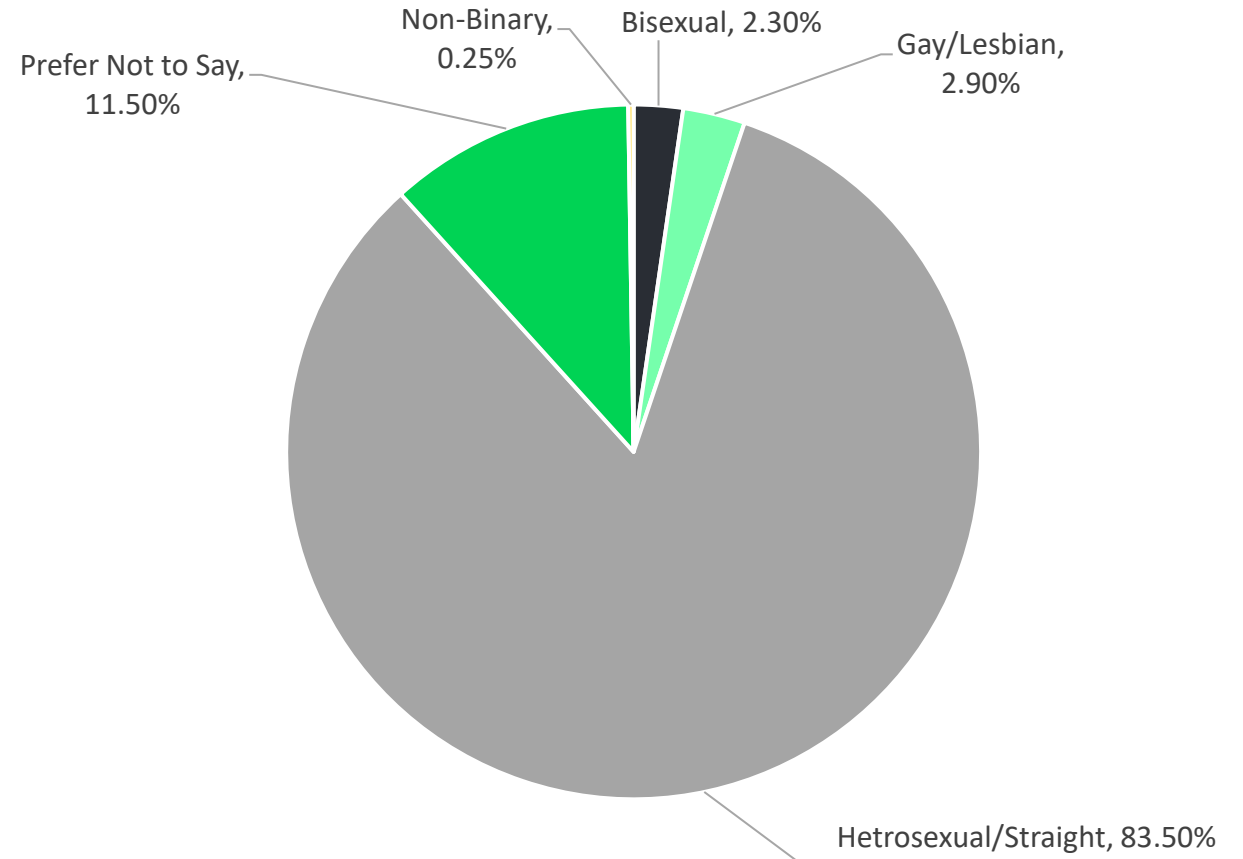
# Sexual Orientation of Respondents

83.5% of respondents to the Haringey business survey stated they were Heterosexual/Straight. That number is in line with the general population demographic statistics in the borough, Where (83.4%) of Haringey's population identify as Heterosexual/Straight ([Haringey Census 2021](#)).

2.9% of respondents identified as Gay/Lesbian, slightly higher than the general population statistics (2.7%). 2.3% of those surveyed said they were bisexual, compared to the 2021 census figure of 2.1%

One respondent to the Haringey survey chose the category of 'other' and stipulated 'non-binary' as their response.

11.5% preferred not to disclose their sexual orientation.



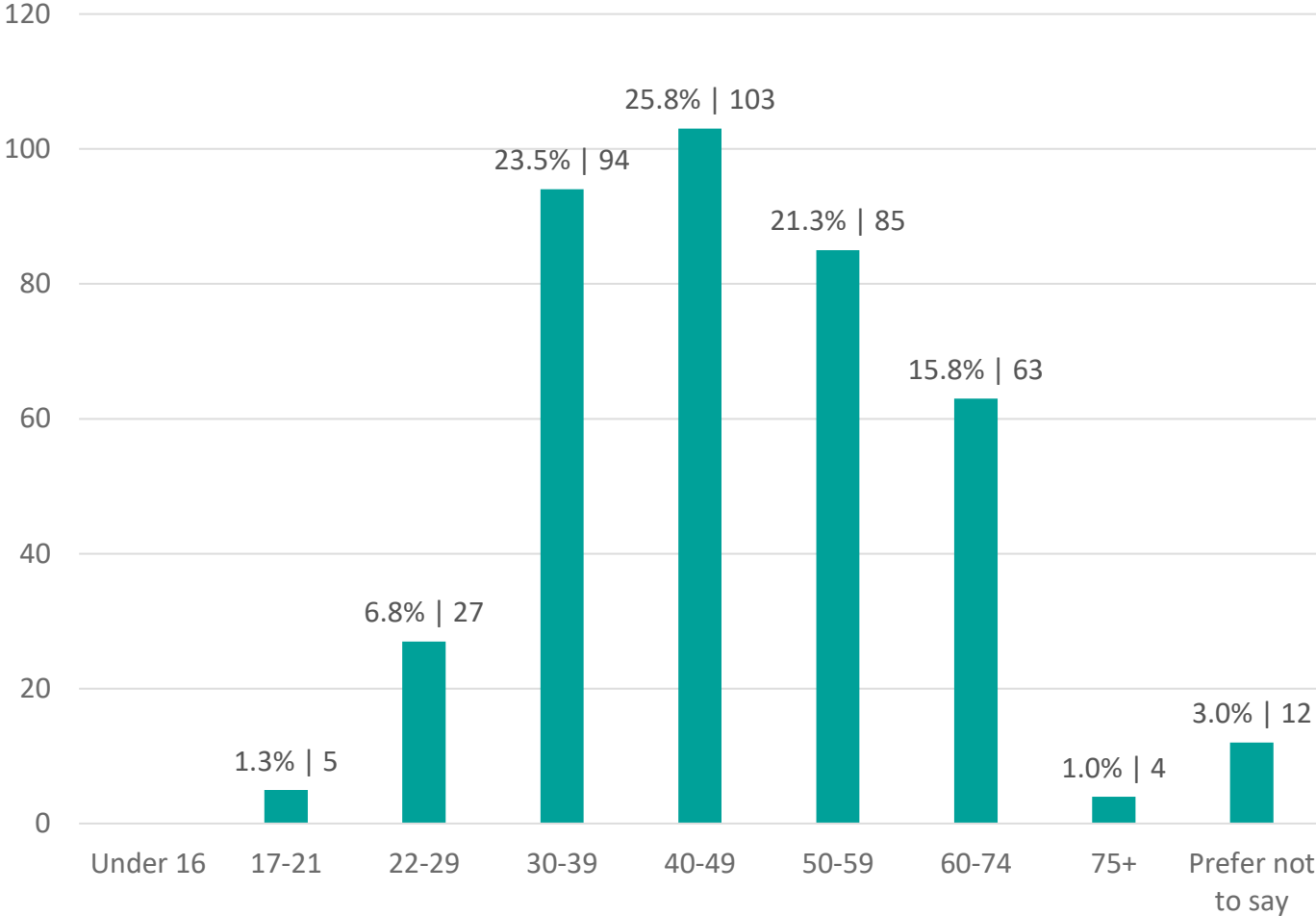
# Age of Respondents

Fig. 13.

The findings show that the majority of respondents to the survey were within the age range of 30 to 59 years of age, representing over 70% of total respondents. This is comparable with UK statistics, which report that 62% of UK entrepreneurs are between 25 and 59 years of age.

12% of UK entrepreneurs are reported to be 60+ years of age ([British Business Bank 2020](#)). In Haringey, 17% of respondents to the survey were 60+.

8% of respondents are between 16 and 29, whereas UK statistics report that 26% of business ownership falls within a similar age range (16-34).



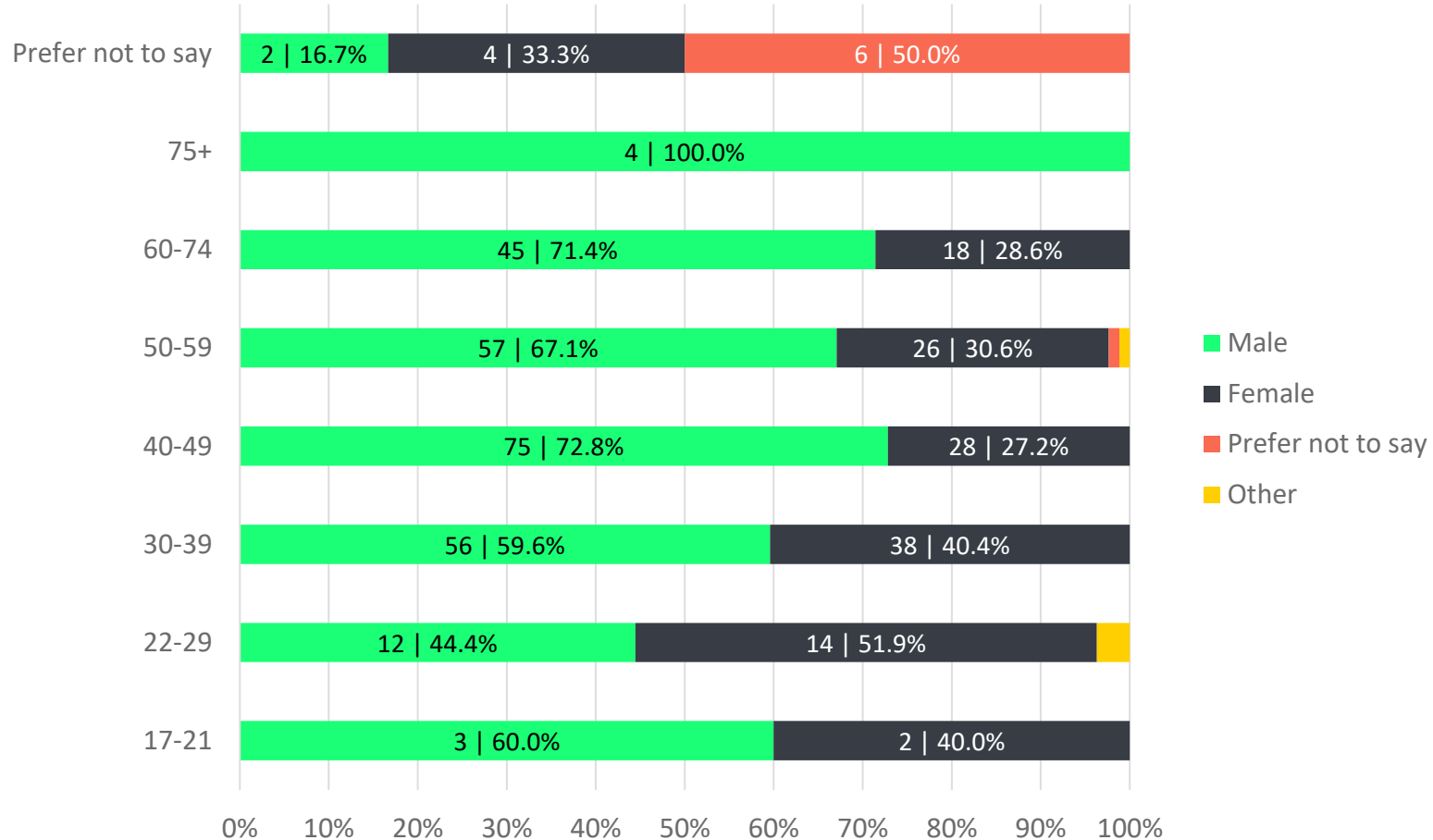
# Age and Sex of Respondents

The graph illustrates the age and sex reported by respondents to the business survey.

The only age range in which there were more female than male respondents was 22-29 years-old (52%).

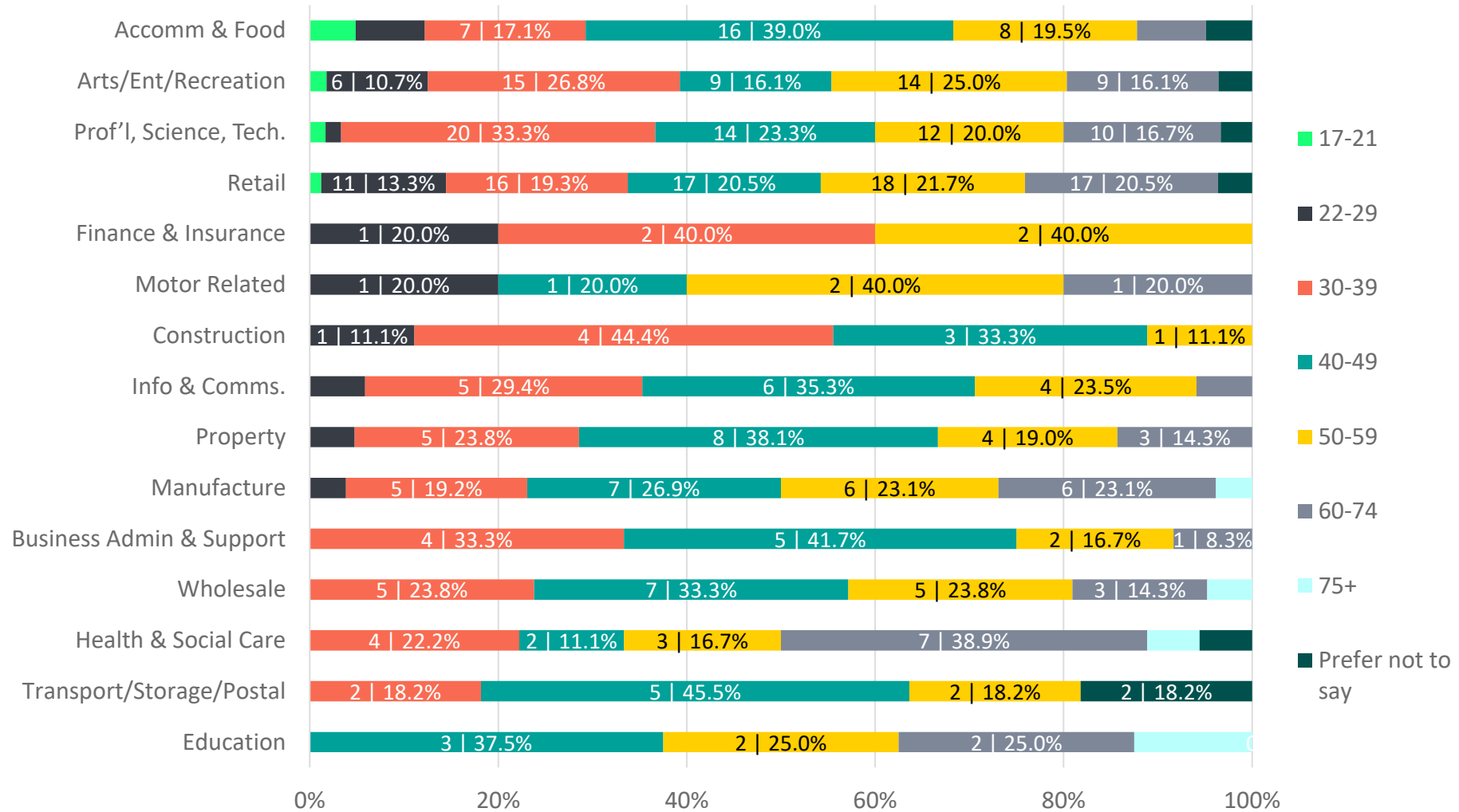
Business owners from 30 years and over are predominantly male, with a notable predominance of male respondents who are 40+ years of age.

100% of respondents in the 75+ age range were male, but it should be noted that there were just four respondents in this category.



# Age by Sector

Fig. 17.





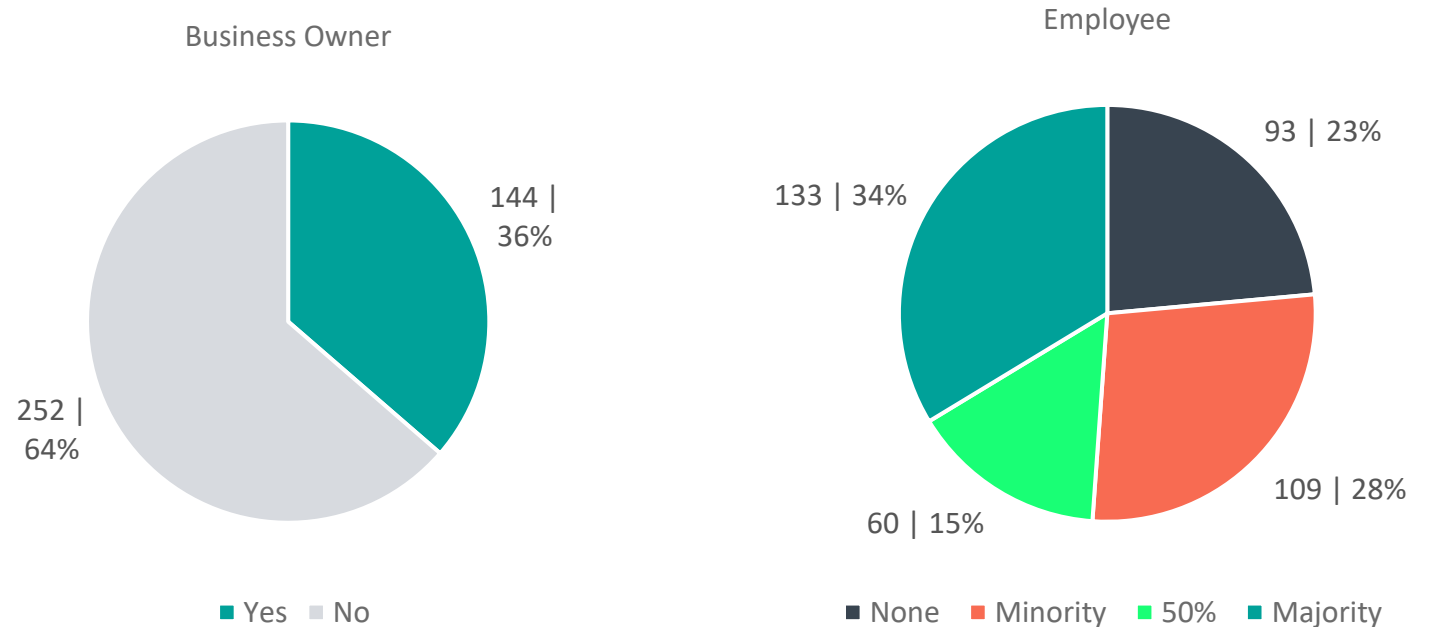
## Haringey Residents



# Employers and Employees who are Resident in Haringey

More than one third of respondents reported that they live in Haringey. A similar proportion also reported that the majority of their employees live in the borough.

More often than not, a proportion of employees live within Haringey. Just 23% of businesses responded that none of their employees are resident in the Borough, whereas 64% indicated that the business owner/director lives outside the borough.



## Business Health

# Impact of Economic Events on Business Performance

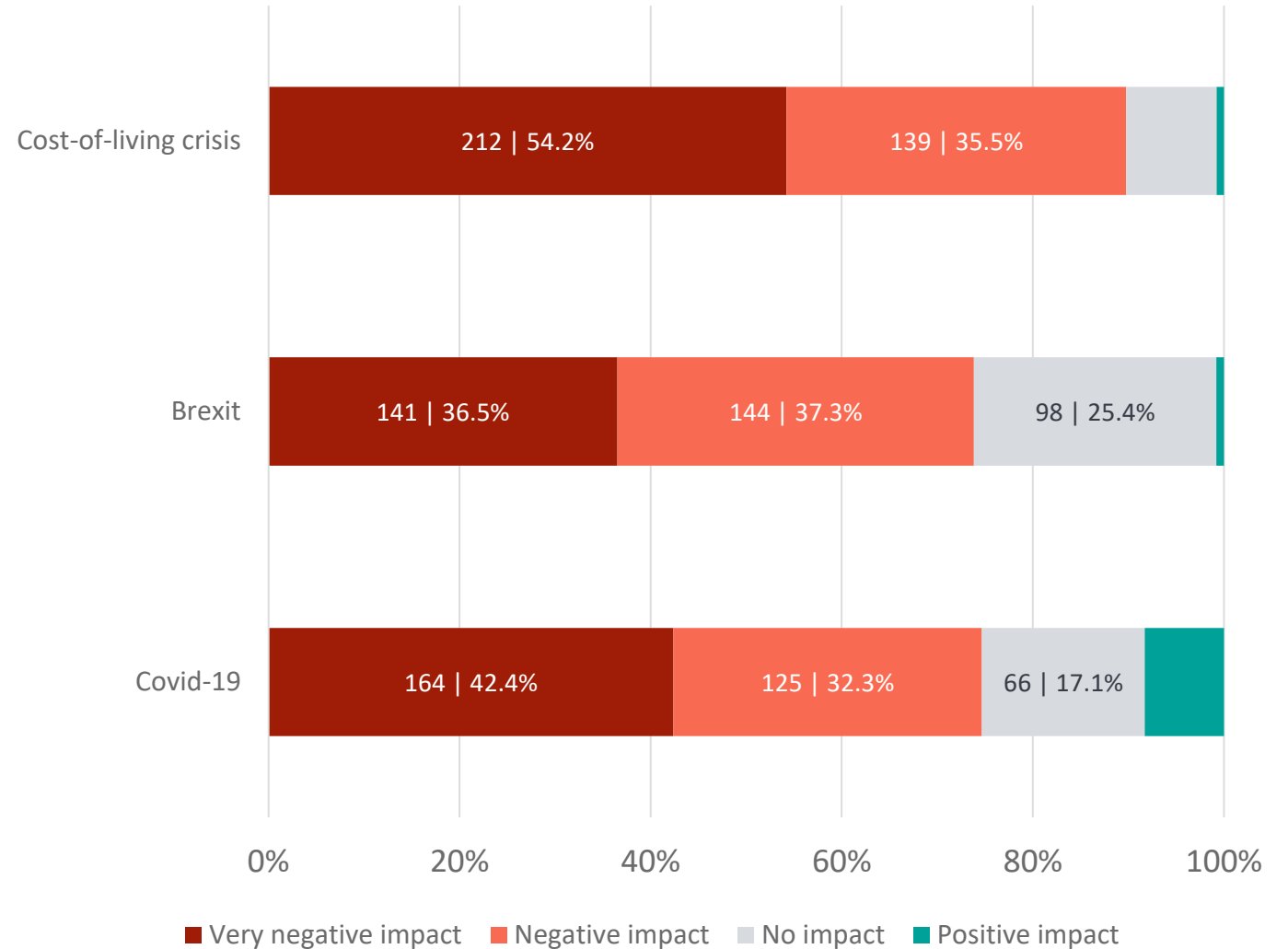
The cost-of-living crisis is perceived as having a very negative impact on a higher number of businesses (54%).

Covid-19, on the other hand, was the event that had the highest perception of a positive impact, with a few positive responses generally spread across 11 of the 15 sectors.

Even so, no more than one-third of the respondents in each sector indicated being positively affected, the highest being Wholesale (29%).

A closer look at the 32 respondents reporting a 'positive impact' from Covid-19 reveals that 31% are Retail or Wholesale and 16% Café or Takeaway businesses.

It was not possible to observe a clear trend between the impacts of Covid, Brexit or Cost-of-Living Crisis in relation to businesses' geographical location or number of years in operation.



# Business Performance

57% of respondents expressed optimism about the future of their businesses. The responses about business turnover in the last 12 months seem to align with expectations for future performance. For instance, businesses that have recently grown are much more likely to believe that this growth will continue (74%).

Looking at the national picture, businesses in Haringey appear to have worse results compared to the latest statistics on SME turnover in the UK from 2021. While a quarter of SMEs in the country saw a decrease in turnover in the past year, that number rises to 44% in Haringey. Additionally, over half of the SMEs in the UK increased their turnover in the past year, which is more than double the rate in Haringey (24%).

Source: [Small Business Survey: UK, 2018-2021](#)

Fig.26 . Optimism for the future

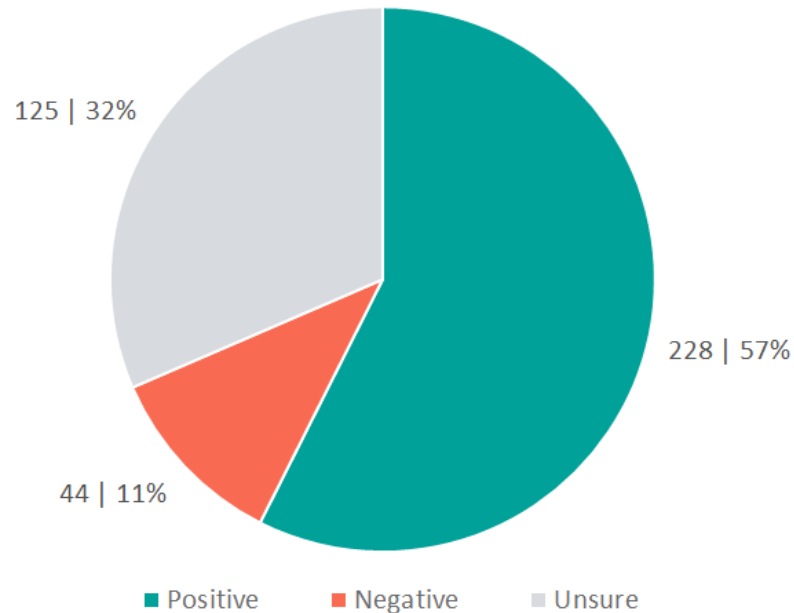
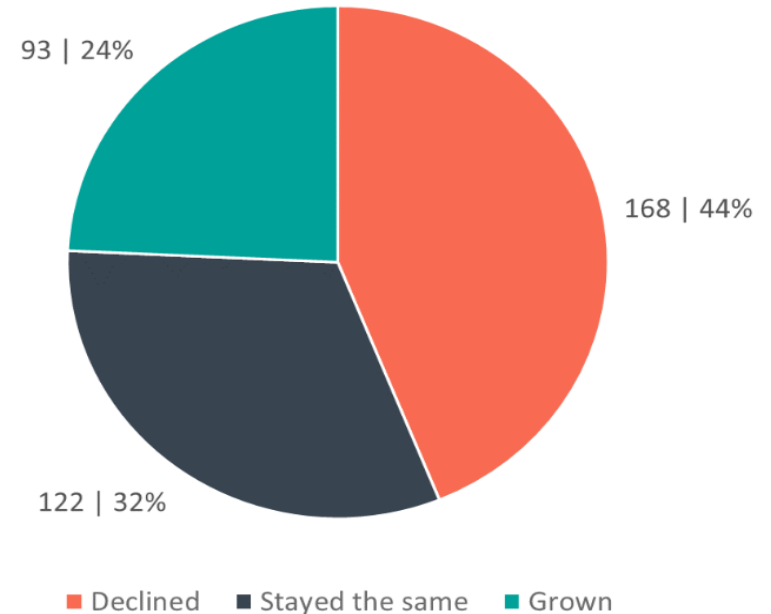


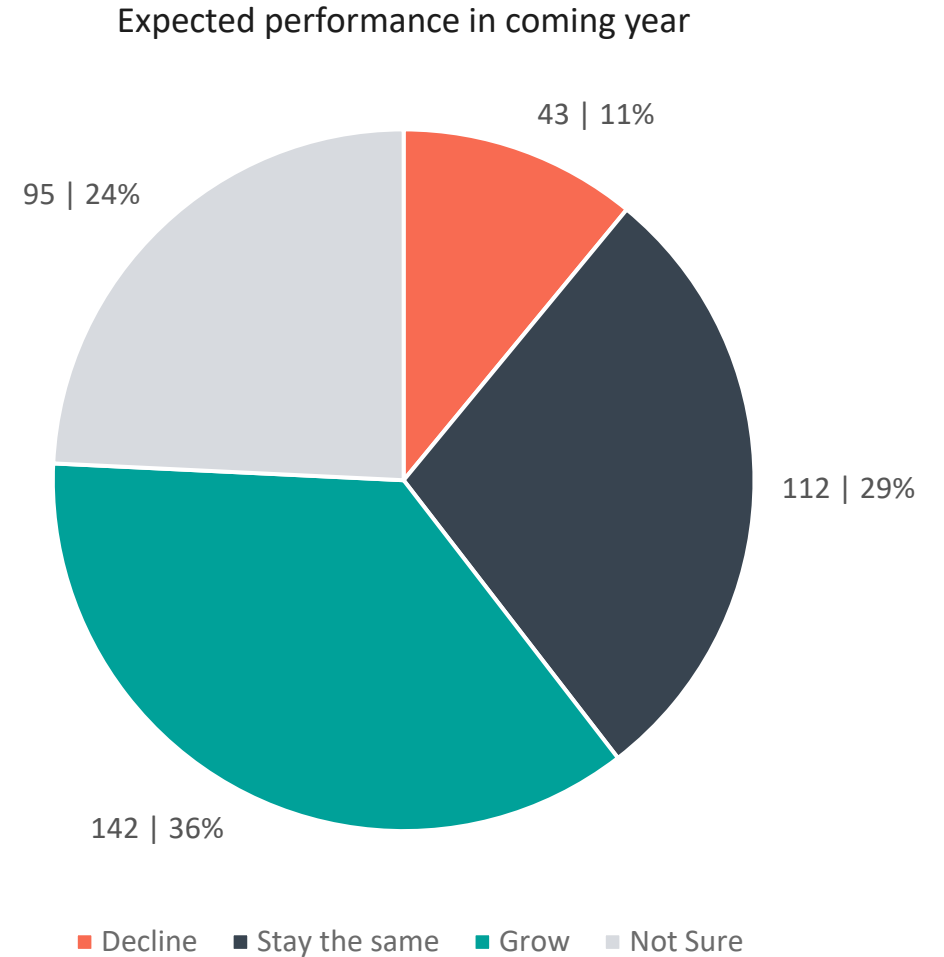
Fig.27. Performance in past year



# Business Performance

On a lesser scale, the same is true in terms of expected growth for the next year. While 42.8% of SMEs in the UK and 39.3% of SMEs in London expect to grow their turnover in the coming months, only 36% of Haringey's business have that expectation. On the other hand, Haringey (11%) is in accordance with the UK trends (10%) when it comes to expected decrease in turnover.

Source: [Small Business Survey: UK, 2018-2021](#)



## Business Premises

## Business Plans for their premises - by Business Size

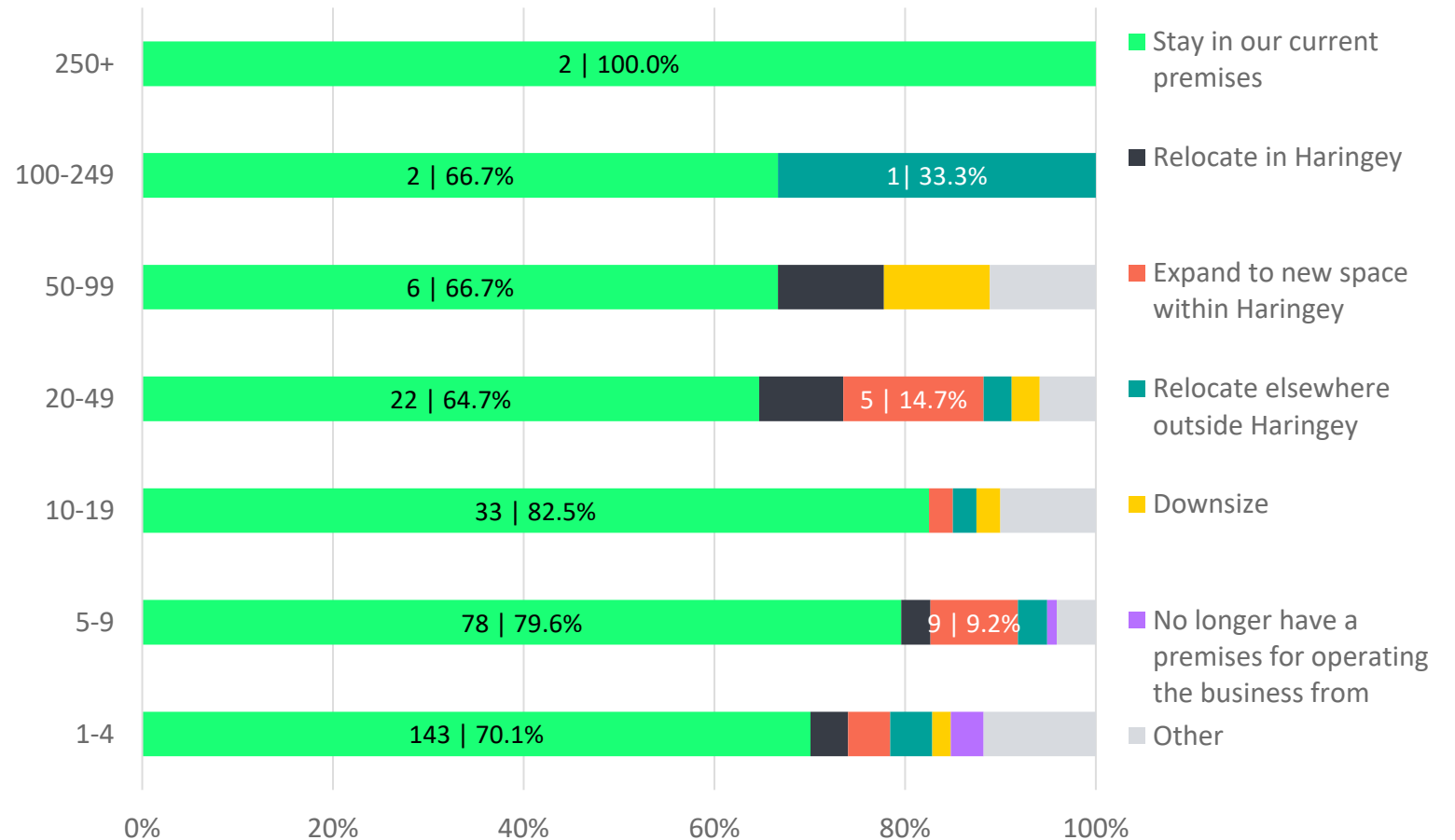
At least two-thirds of business plan to stay in their current premises in the foreseeable future.

At least 78% of businesses between 1-99 employees plan to stay in Haringey (either staying at the same premises, relocating or expanding within the borough).

One-third of businesses within 100-249 employees are planning to leave Haringey. It is worth noting that, due to the sampling methodology, only 3 companies from that range were interviewed.

Around 22% of businesses with 20-49 employees are looking to relocate or expand within Haringey.

While 11% of businesses with 50-99 employees are looking to relocate in Haringey, other 11% are planning to downsize.



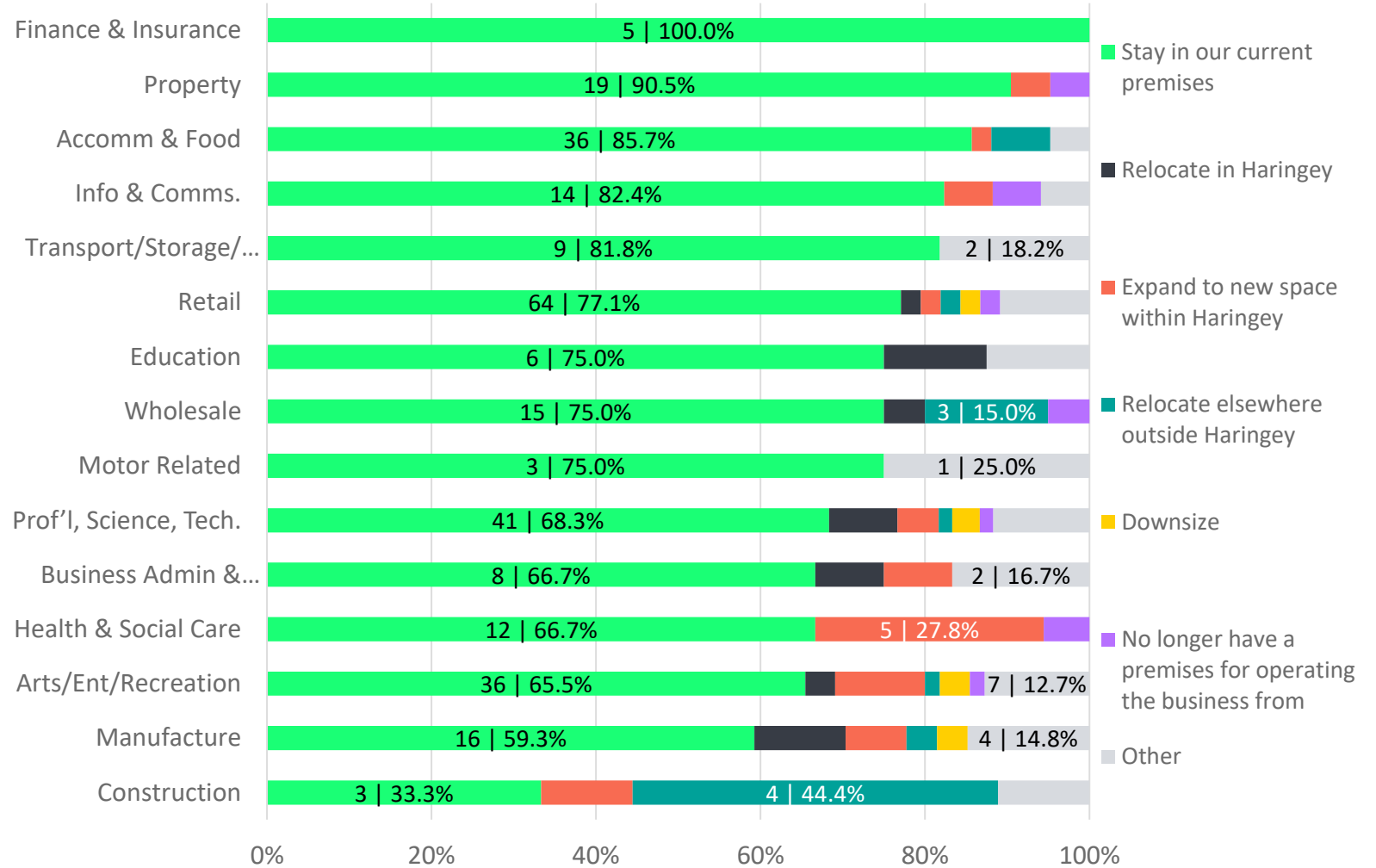
# Business Plans for their premises - by Sector

At least two-thirds of businesses in the majority of sectors plan to stay in their current premises for the foreseeable future.

More than 80% of businesses in Transport/Storage/Postal, Info and Comms, Accommodation and Food Services, Property, and Finance and Insurance are planning to stay in their current premises.

Health and Social Care (27.8%), Manufacture (18.5%), and Arts, Entertainment and Recreation (10%) are the predominate sectors looking to relocate or expand to new space within Haringey.

Sample size for Construction, Professional, Scientific and Technical, Business Admin. and Support, Information & Communication sectors is not significant to draw reliable conclusions.





## Evaluation of Existing Business Support Initiatives

## Average Awareness and Take up of Haringey Business Support Initiatives

On average, 78% of respondents were not aware of any of Haringey's existing business support programmes. Within those respondents, almost one-third were interested in receiving information on the existing support programmes.

Within the respondents who were aware of the support programmes offered by the council (22.1% of the total number of businesses who were asked that question):

- 81.9% have not used those services, of which 14.9% are not interested in receiving further information. Anecdotally, several businesses said they didn't think services were relevant to them.
- Out of the 18.1% that have used the service, the opinions have been equally divided in the matter of whether it was beneficial and not beneficial.

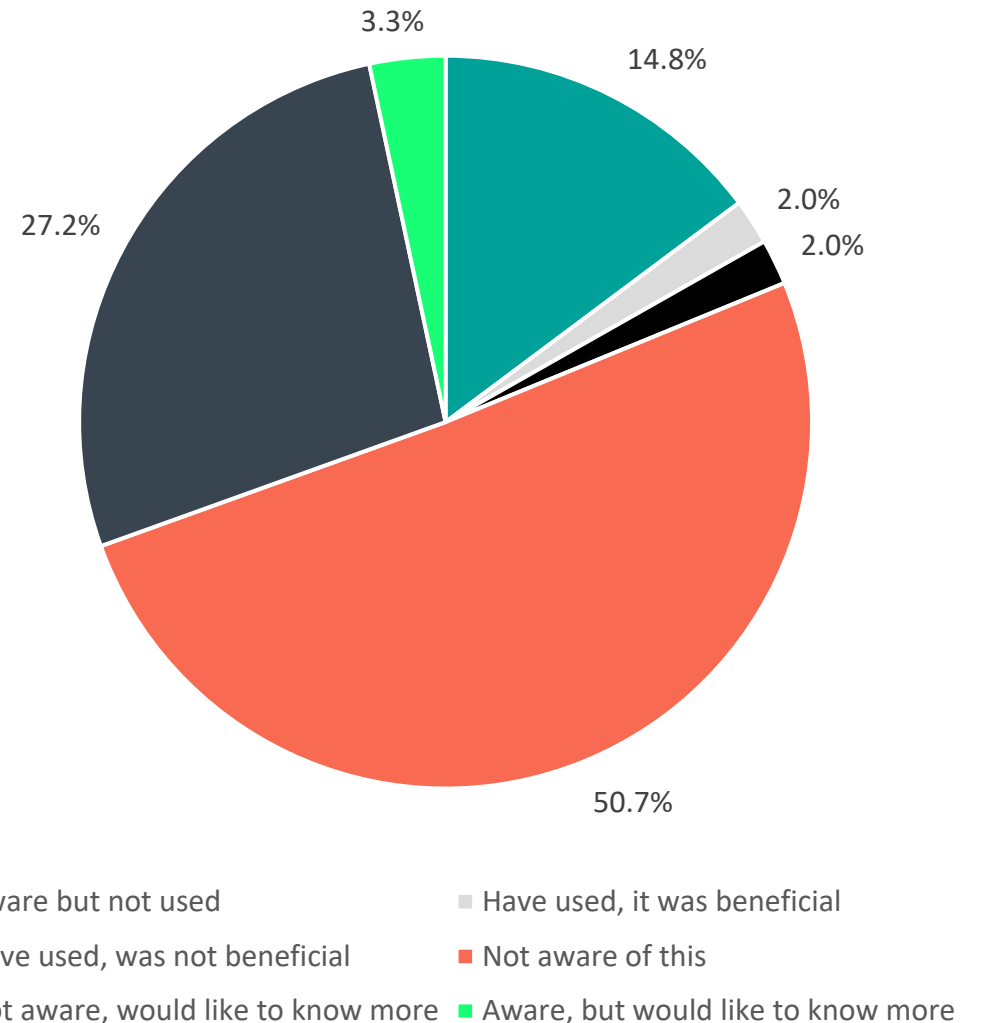


Fig. 42.

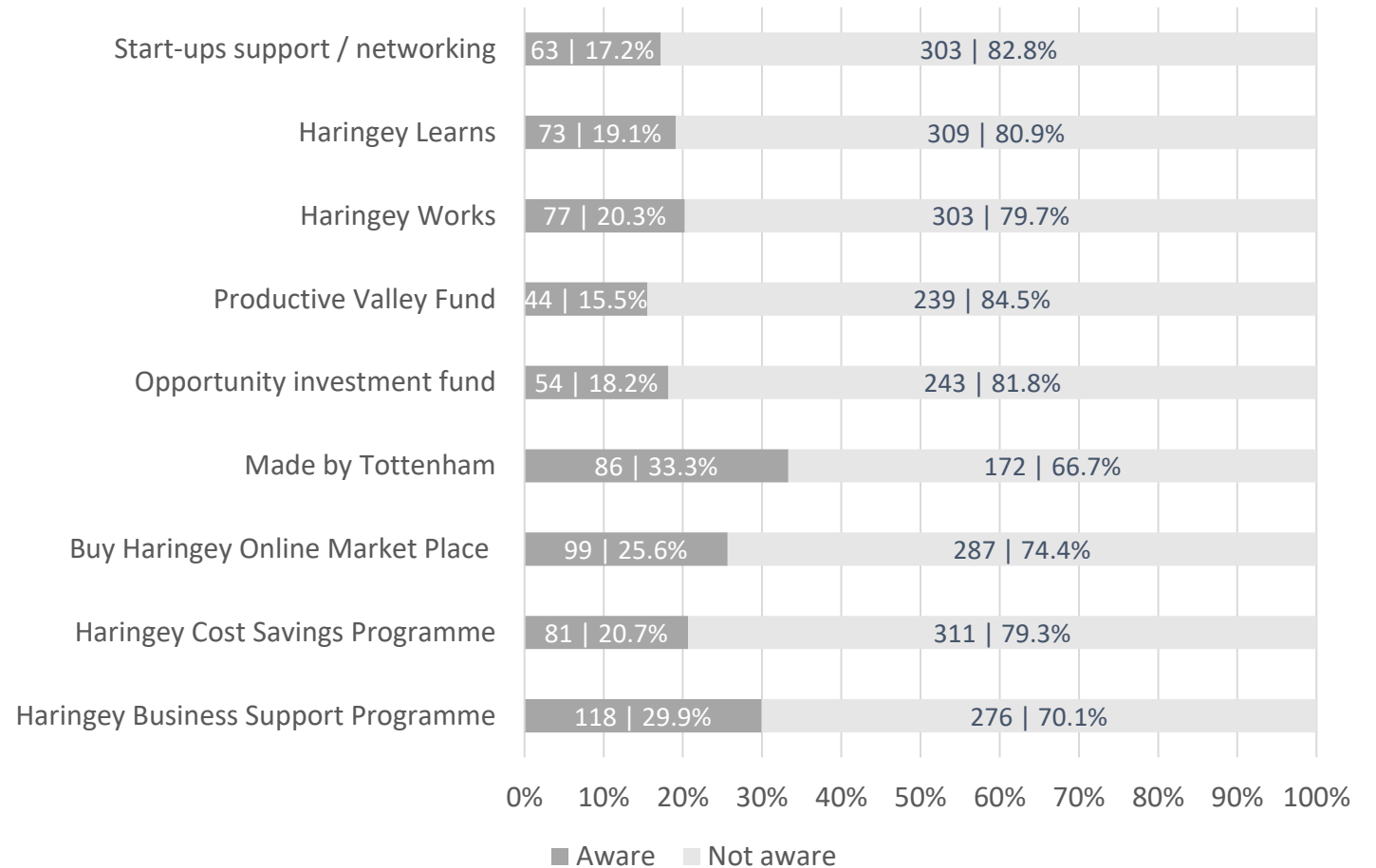
# Awareness of Existing Haringey Business Support Initiatives

In general, awareness of business support in relation to each of the initiatives sits between 15-20%.

Made by Tottenham is the programme with the highest level of awareness. This initiative was recognised by one third of respondents.

Other initiatives with some awareness were the Haringey Business Support Programme (29.9% awareness) and Buy Haringey Online Marketplace (25.6% awareness).

It is important to note that only 65% of total respondents were asked about Made by Tottenham, 70% were asked about the Opportunity Investment Fund, and 74% were asked about the Productive Valley Investment, dependent on eligibility for those programmes by geographical location.

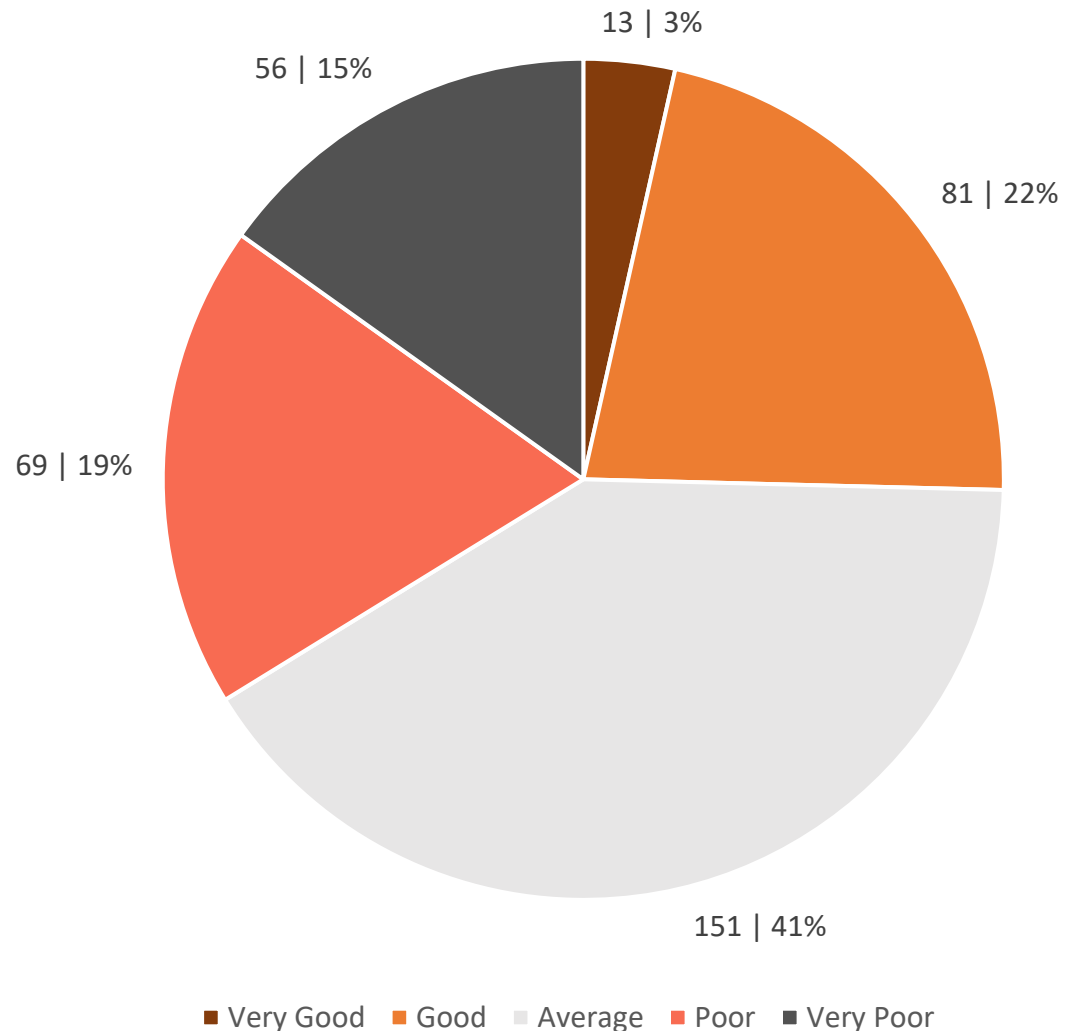


## How Would you Rate Haringey Council Services in Relation to Your Business?

In follow up to the question about the various support initiatives, respondents were asked their opinion of the services provided by Haringey Council. The responses to this question are depicted in the graph opposite.

Anecdotally, interviewers noted that the response to this question was in many cases accompanied by comments related to a specific experience or practical issue, such as traffic congestion or waste collection.

Many businesses are not aware of the support services offered by Haringey Council.



## Future Business Support Needs

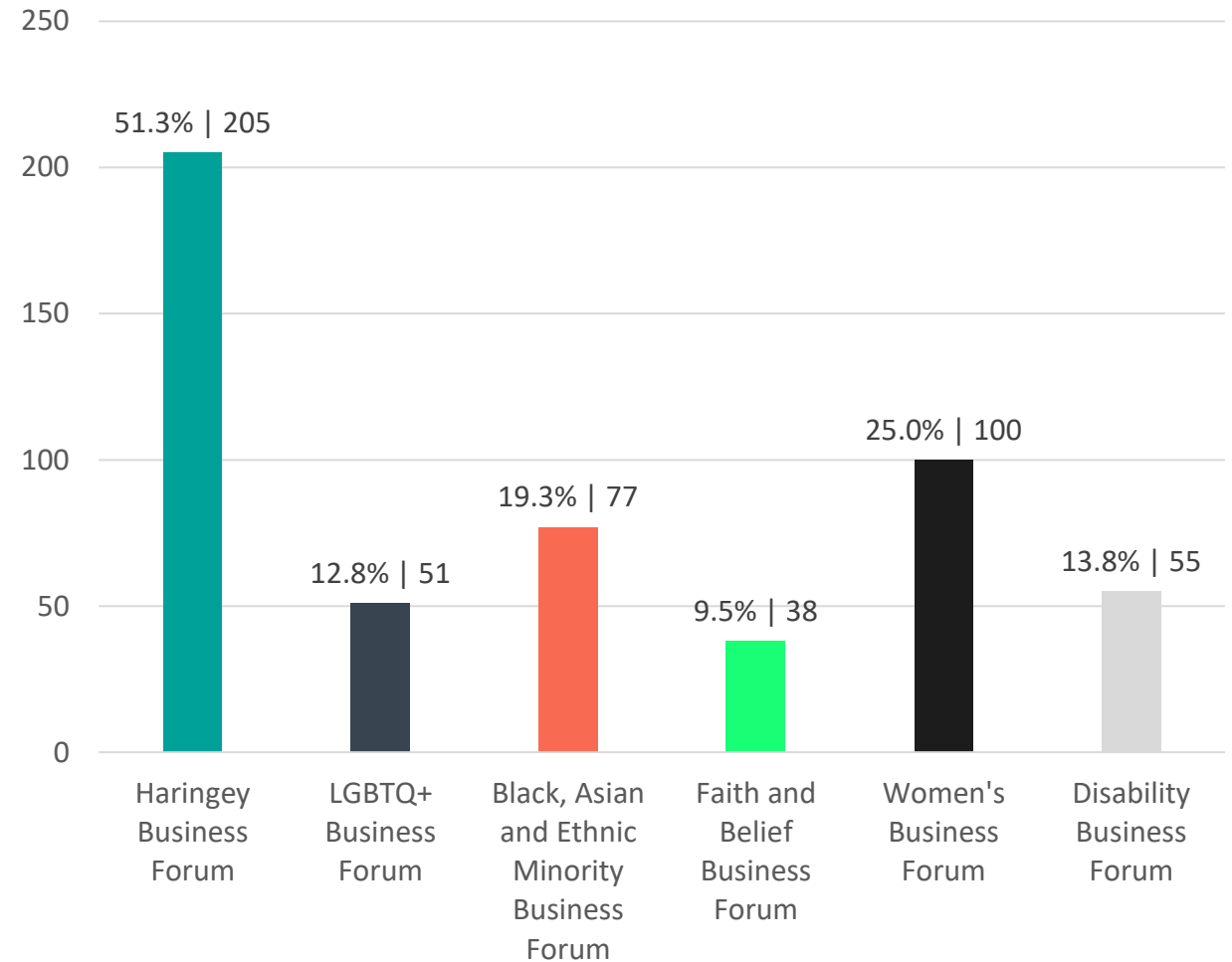
## Interest in a Future Business Forum

Businesses were asked to indicate their interest in joining potential business forums. Options for specific forums, as an LGBTQ+ forum, were included.

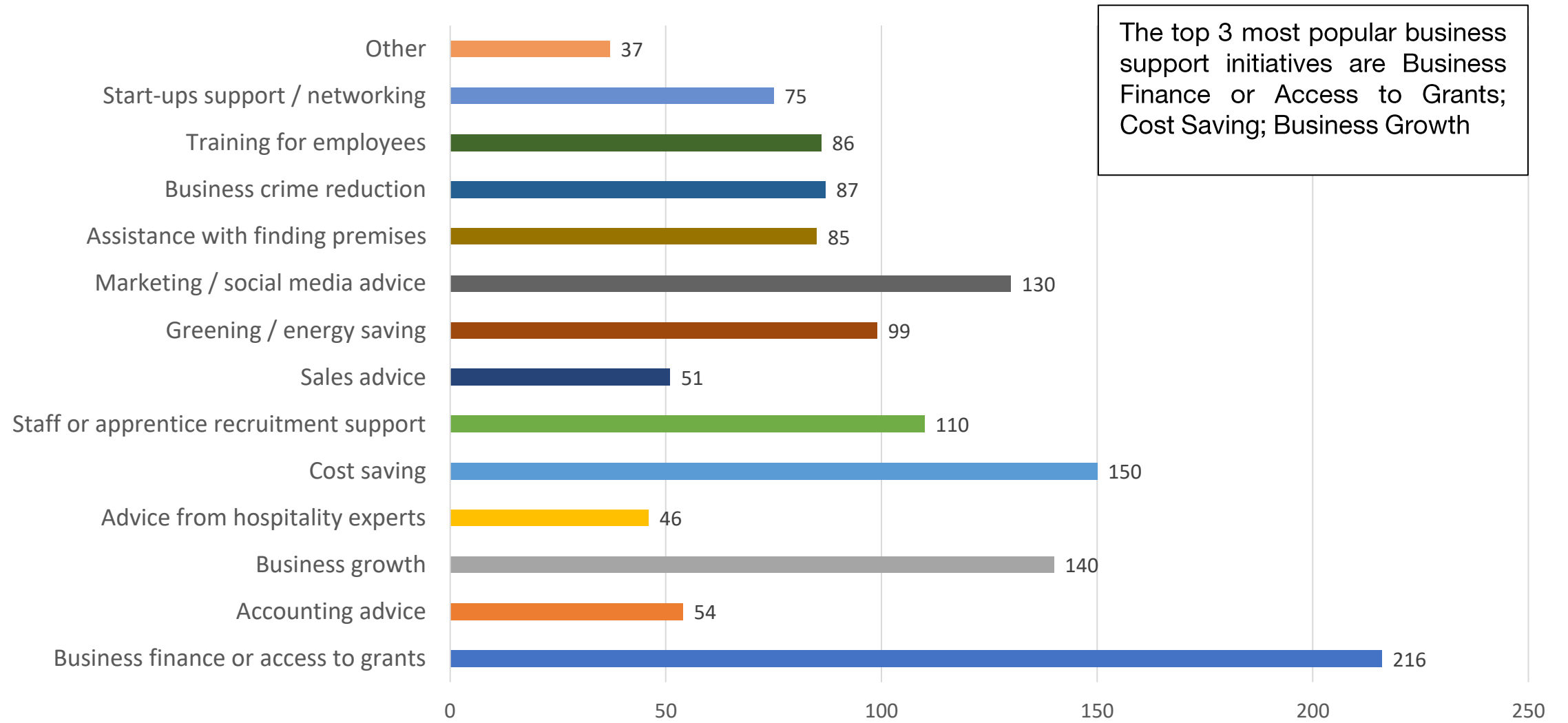
More than half of survey respondents indicated interest in a general, Haringey Business Forum involvement, with a fair level of interest in each of the 'themed' forums.

Anecdotally, a handful of businesses disagreed with the concept of segregating into different groups, stating that this is an opportunity to collaborate with other business owners regardless of sex, faith or ethnicity etc. There were also comments on finding the time to attend meetings, and a dislike for regular meetings that become a 'talking shop'.

Findings indicate that businesses in both the West and particularly the East of Haringey expressed an appetite to be involved. The pattern of which forum is of interest looks to be similar, regardless of location.



# Interest in Business Support - General



# Communication



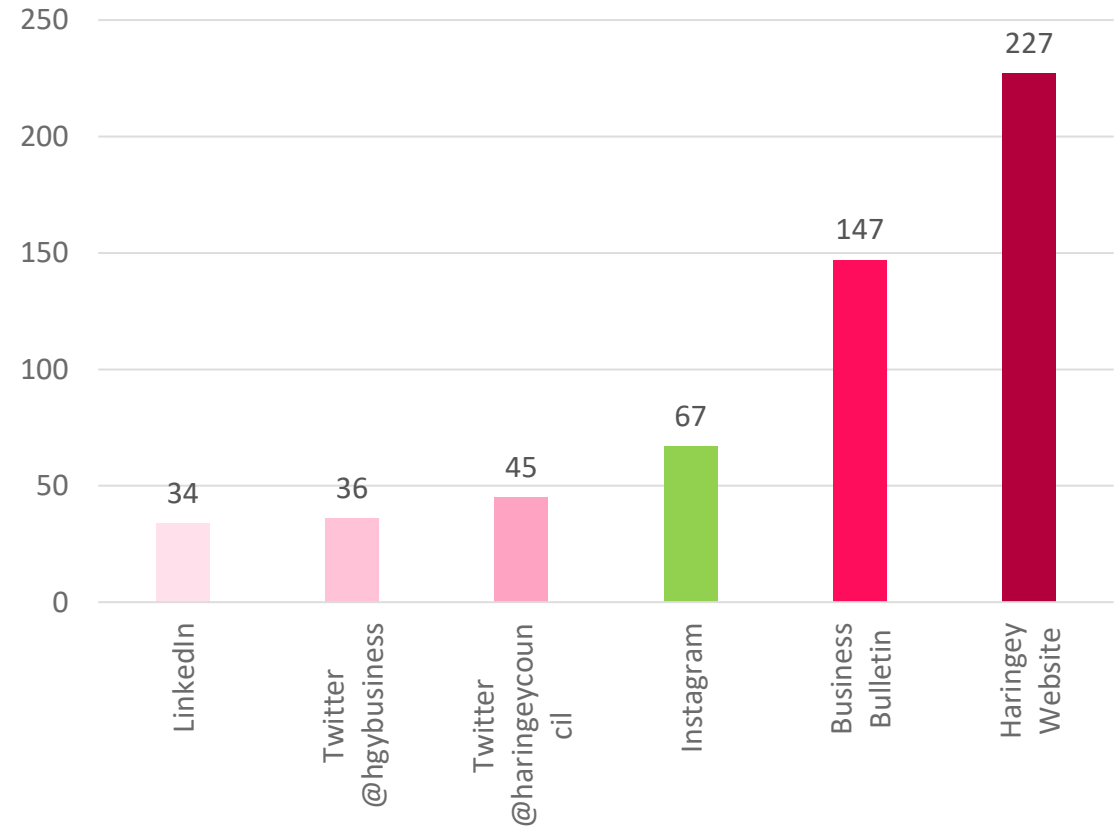
# Number of Respondents that Follow each of Haringey's Council's Communications Channels

The graph displays the total responses to the question (556), as respondents could select more than one option, and the percentage of each response in relation to the total interviews (400).

The Business Bulletin e-newsletter has almost triple the number of subscribers when compared to other Haringey Council channels.

Although Haringey Council Website has a significant number of users, anecdotally many respondents indicated that they access the website for personal reasons, such as paying fines and other parking issues, rather than issues related to their businesses.

Even though the Haringey Council's social media channels have a significant number of followers, the survey responses clearly demonstrate that many businesses do not follow Council social media channels. Anecdotally, several businesses were unaware of the existence of these channels and said that they might follow in future.





# Recommendations



# Recommendations

Based on the findings and conclusions outlined in this report, the following recommendations are proposed:

## **Recommendation 1: Focus groups with representatives from the business community.**

The purpose being to explore the key issues in more detail, for example what businesses are struggling with, what are they less aware of, what do they need more help with and what do they see as priorities.

Focus groups might bring together participants from a specific sector or group, dependent on the topic to be discussed.

Respondents were asked whether or not they would be willing to be contacted for the purpose of further research and where this was agreed, a database of email addresses has been supplied for follow up.

## **Recommendation 2: Targeted and frequent communication with businesses**

The Haringey Business Bulletin, a fortnightly email digest, is a popular way for businesses to receive relevant information. A number of respondents opted to subscribe to the channel and email addresses for subscribers have been supplied to the Council.

The Economic Development Team have already begun to work on establishing a database of businesses and strategy for outreach, including following up with those who expressed interest in specific areas of funding or advice.

# Recommendations

## **Recommendation 3: An accessible, dedicated point of contact for businesses**

This is a resource suggested by several respondents to the survey, in response to questions about the existing Haringey Council website.

The purpose would be to signpost relevant information and contacts for relevant council officer for practical issues such as planning applications or parking permits. An online resource, supported by council officers to enable timely responses to specific questions.

## **Recommendation 4: A dedicated Business Forum (or several forums)**

Over 50% of respondents expressed interest in establishing a business forum for Haringey. This would be an opportunity to enable ongoing, two-way dialogue between Haringey Council and its business community.

For some areas of Haringey, area-based forums already exist in the form of the trader's associations and Business Improvement District. These can act as case studies to share learnings and best practice for any new group.

It is important that businesses are involved in setting the agenda from the outset, to ensure that the discussions are relevant and encourage inclusivity. If available, a small amount of funds or resources allocated to a tangible project can help galvanise the group.

Meetings would take place on a regular basis, say quarterly, to keep up momentum whilst not taking up too much of volunteers' time

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