

August 2026

re:shape

Shared Living Needs Assessment

Ashley Park



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Executive Summary

This Shared living Needs Assessment evaluates the appropriateness of delivering purpose-built shared living ('shared living') accommodation in Tottenham Hale.

The report examines relevant planning policy, demographic characteristics, housing market conditions, and findings from in-person engagement to determine whether the delivery of shared living would respond to an identifiable local demand for single-occupancy housing.

Shared living is an emerging housing typology and is therefore not extensively defined within planning policy. However, a review of relevant national, regional, and local policy confirms that it can play a role in supporting housing delivery, increasing housing choice, and supporting mixed and balanced communities within the London Borough of Haringey ("LB Haringey"). This is particularly relevant in Tottenham Hale, where policy supports higher-density residential development in well-connected locations.

Purpose-built shared living is designed to accommodate single-person households. Analysis of Census (2021) data confirms that this household type forms a significant component of the local population in both Tottenham Hale Ward and LB Haringey, supported by a demographic profile characterised by a high proportion of working-age residents and mobile, economically active groups. These segments are demonstrated to be relatively larger locally when compared against London and national benchmarks.

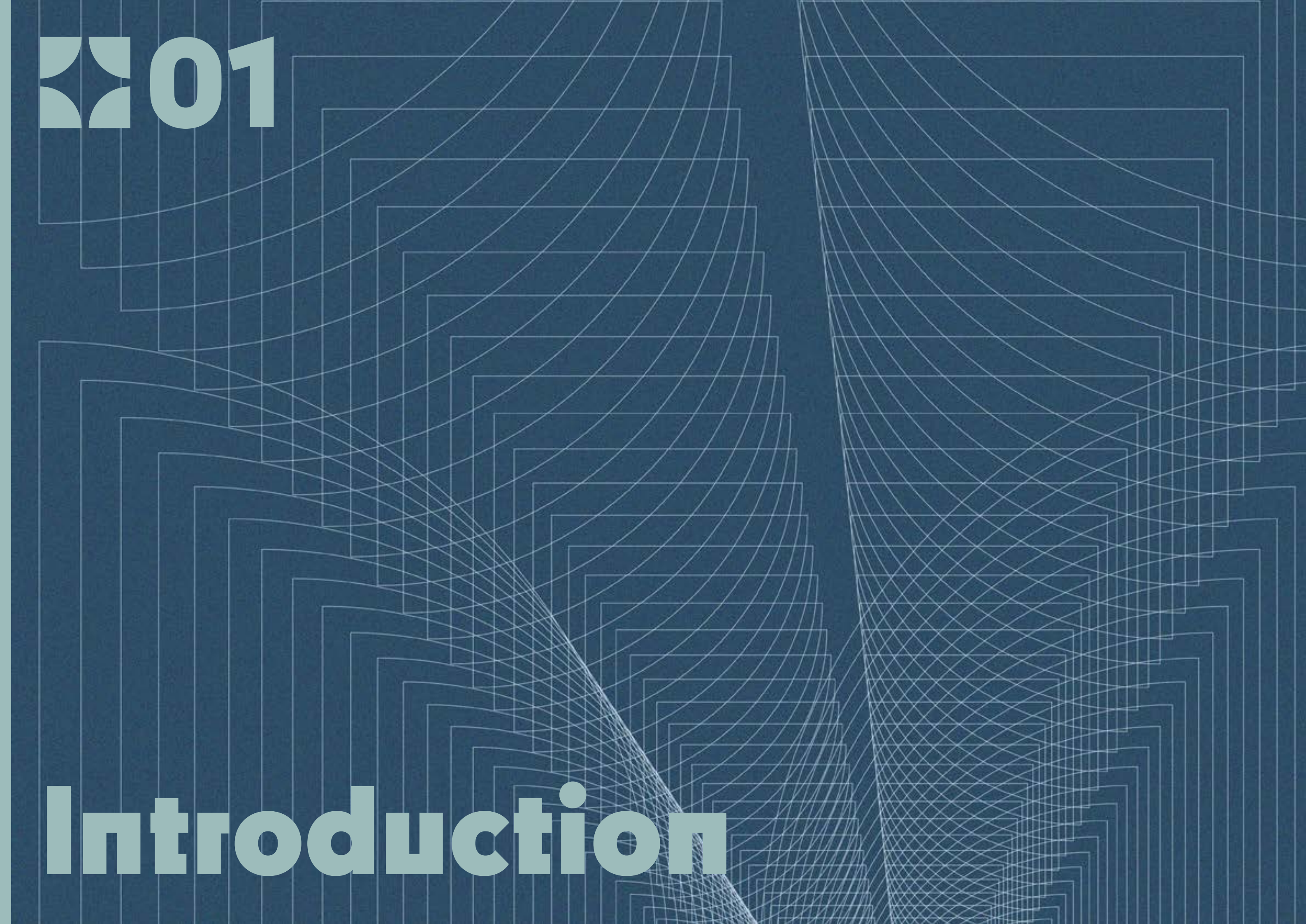
In-person engagement was undertaken to test local demand for shared living. This included residents, local workers, and visitors to Tottenham Hale, drawing from a broad cross-section of views on the housing market in the local area. Survey results offer direct insight into perceptions of housing need and demand for shared living.

The findings from the policy review, demographic analysis, and engagement are brought together to establish a clear local case for shared living. This is supported by a review of planning activity, which confirms limited existing provision and a modest pipeline, alongside an affordability assessment demonstrating that shared living offers a comparatively accessible option for single-person households.

The Assessment concludes that the introduction of shared living at Ashley Park would occur within a balanced and diversified residential environment. The development would therefore represent a proportionate addition to the local housing mix and would broaden housing choice without significantly altering neighbourhood character.



**Ashley Road,
London, N17**



01

Introduction

Purpose of this Assessment

1.1 This Shared Living Needs Assessment has been prepared by AND London to support a proposed development at Ashley Park, N17 9LZ ('the Site'). The proposals include the delivery of large-scale purpose-built shared living ('shared living') as part of a mixed-tenure development.

1.2 The purpose of this Assessment is to examine the suitability of large-scale purpose-built shared living within the local planning and housing context. It considers demographic evidence, housing market conditions, and relevant policy frameworks to determine the extent to which shared living responds to local housing needs. Further, the Assessment explores whether shared living would contribute to a mixed and balanced community.

1.3 Specifically, this Assessment addresses the following questions:

1. What are the key characteristics of the shared living proposal?
2. How will the shared living proposals meet an identified un-met housing need?
3. How will the shared living proposals contribute to a mixed and balanced community?

1.4 The Assessment is structured as follows:

- + **Section 2 – Policy Review:** Defines shared living within national, regional, and local planning policy and subsequently sets out the relevant planning guidance.
- + **Section 3 – Demographics:** Establishes a statistical baseline for Tottenham Hale Ward and London Borough of Haringey within the wider regional and national context, assessing population and household composition, as well as projected change.
- + **Section 4 – Engagement:** Provides first-hand survey data that gauges local demand for shared living housing and commercial typologies.
- + **Section 5 – The Case for Shared Living:** Draws together demographic evidence, housing market conditions and affordability analysis to assess the role that purpose-built shared living could play in meeting identified local housing needs.

1.5 This Assessment should be read alongside other planning application documents including the Planning Statement.



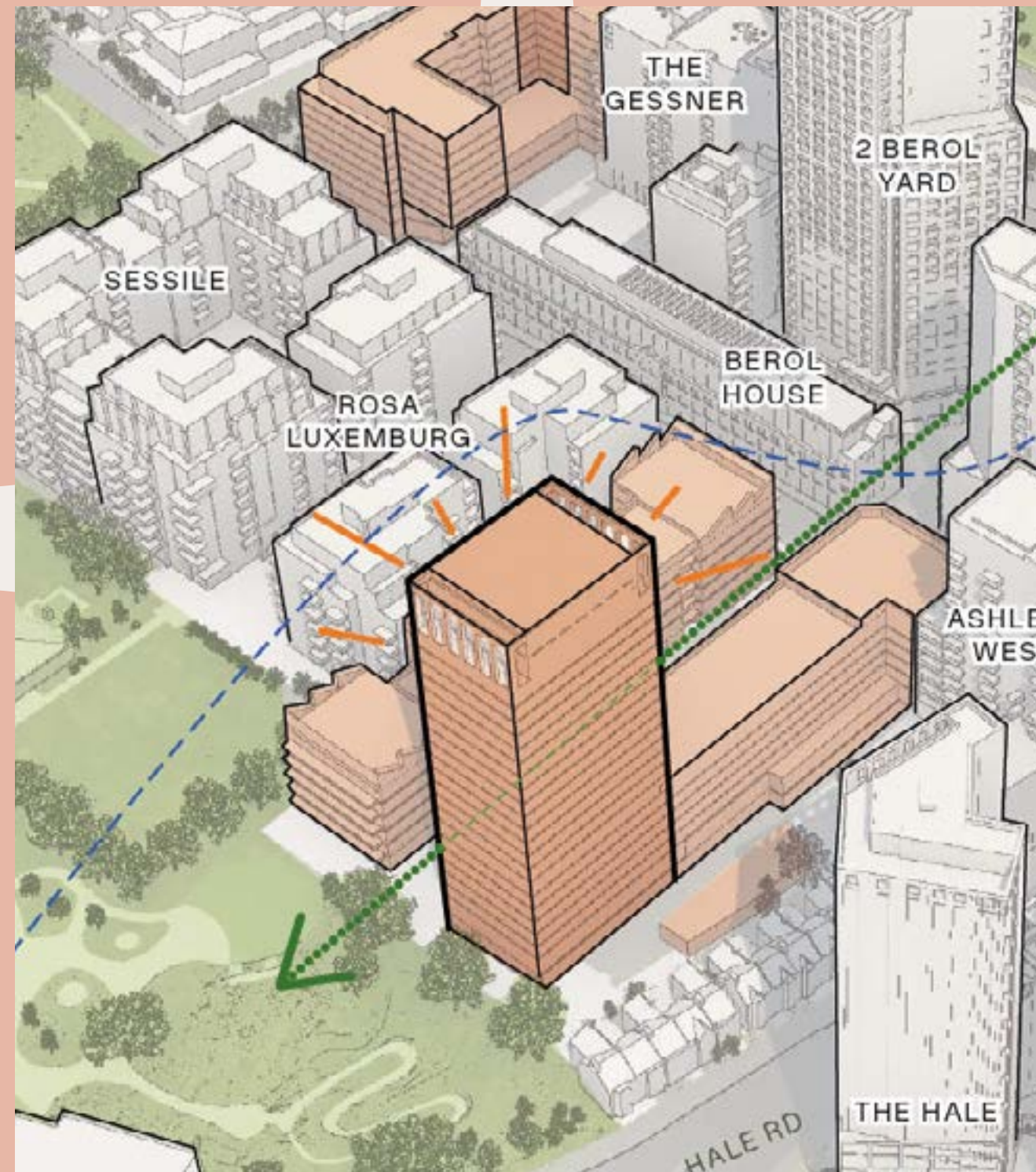
The Site and the Proposed Scheme

The Site

1.6 The former Ashley House site is located within Tottenham Hale Ward in the London Borough of Haringey. The majority of the Site lies within the emerging Tottenham Hale District Centre, with the remainder sitting on its immediate fringe, placing the site at a highly accessible interface between an established residential neighbourhood as well as an area of planned town centre expansion.

1.7 The Site occupies a prominent position bounded by Down Lane Park to the west, Ashley Road to the east and Hale Road to the south. It currently comprises a vacant site within the Tottenham Hale Growth Area, Opportunity Area, and Housing Zone, where the adopted Local Plan identifies significant opportunities for regeneration and residential-led development.

1.8 The Site benefits from excellent public transport accessibility (PTAL 5) and is located immediately adjacent to Tottenham Hale Station, providing direct London Underground (Victoria line), National Rail and Stansted Express services with fast connections to Stratford, Central London, wider London destinations and Stansted Airport. The Site also benefits from an extensive network of bus services and strategic cycling routes, supporting direct transit to central London and the surrounding neighbourhoods.



The Proposed Scheme

1.9 Proposals for the Site seek to deliver a mixed-use, mixed-tenure scheme. The proposals include 522 shared living studios, complemented by active ground-floor commercial uses, new public realm, and extensive landscaping.

1.10 In addition to the shared living accommodation, the Ashley Park scheme proposes 87 affordable social rented homes, ground-floor commercial and community uses, together with the delivery of the Ashley Link, a new east-west pedestrian and cycle route that extends from Down Lane Park through the Ashley Road South masterplan, over the railway and onward through Hale Village and beyond. Collectively, the proposals combine a range of residential, commercial and community uses.

What Is Shared Living?

1.11 Shared living is a form of large-scale purpose-built shared living that falls within the Sui Generis use class (instead of traditional use class C housing). Developments comprise a private studio unit supported by shared communal facilities, which can include gyms, co-working space, resident lounges, dining areas, and programmed social or wellness events designed to encourage interaction and community interactivity. Accommodation is typically offered on an all-inclusive basis with flexible tenancy agreements.

1.12 Shared living appeals to a broad demographic and attracts residents from across a wide age and socio-economic spectrum. However, sector research indicates that a significant proportion of shared living residents are younger and working-age adults seeking convenience, flexibility, and opportunities for social and professional connection. This includes recent graduates transitioning from student accommodation, mobile professionals relocating to new cities, and individuals seeking interim housing during periods of personal or professional change (Harris & Associates, "Co-Living Report", February 2024).

1.13 A further benefit for many residents is that shared living is typically managed by corporate professional landlords with integrated facilities management. This can offer a level of quality, maintenance, and security that is often absent in informal shared living or other housing options for sharers available in the private rented sector.

1.14 Research by Savills ("Spotlight: UK Co-Living 2025", February 2025) suggests that in 2025 there was close to 9,000 operational shared living units across the UK. 3,300 units were completed in 2024 alone, with schemes currently under construction suggesting a pipeline of 3,600 units. Further, Savills reported an 87% increase in planning applications for shared living schemes between 2023 and 2024, reflecting growing interest from both investors and residents. Despite this growth, shared living remains an emerging housing typology within LB Haringey, with limited operational provision currently delivered across the borough. The borough's first purpose-built shared living scheme was approved at 25-27 Clarendon Road, Wood Green in 2025.



Case Study



FOLK at Sunday Mills

1.15 Located in Earlsfield in the London Borough of Wandsworth, FOLK Sunday Mills is a purpose-built shared living development delivered following planning consent granted in 2020. Operational since October 2022, the scheme represents an example of large-scale shared living provision in London.

1.16 The development comprises 315 shared living units, each providing a studio with a private bathroom, kitchenette, and dedicated workspace. The residential offer is supported by shared amenities, including co-working spaces, lounges, a gym, cinema room, library, and rooftop garden, alongside a curated programme of resident activities.

1.17 Market rents for standard units start from approximately £1,809 per month (all bills included), with tenancy terms typically ranging from 3 to 12 months. FOLK also incorporates 109 affordable units secured through a S106 agreement offered at discounted rents from £182 per week. This dual offer demonstrates how shared living can combine discounted and market housing within a single professionally managed model, supporting mixed and balanced communities.

Case Study



ARK Wembley

1.18 ARK Co-living Wembley is a purpose-built shared living development located in the heart of Wembley. Completed in 2022, the scheme comprises 300 fully furnished shared living studios supported by an extensive range of shared amenities and community-focused spaces

1.19 Residents benefit from a variety of high-quality communal facilities such as co-working space, a gym, communal kitchens, yoga and event spaces, a cinema room and a roof terrace. These amenities are included within the monthly rental rate of approximately £1,600.

1.20 With a 97% occupancy rate, ARK Wembley demonstrates strong and sustained demand for purpose-built shared living and provides an established example of its successful long-term delivery.

Case Study



Dandi Wembley

1.21 Located in Wembley Park within the London Borough of Brent, Dandi Wembley is a purpose-built shared living development that completed in 2023. The scheme forms part of the wider Wembley regeneration area and represents a contemporary example of professionally managed shared living in London.

1.22 The development comprises 355 fully furnished studio apartments, supported by an extensive range of shared amenity spaces. These include a cafe, co-working facilities, communal kitchens and dining areas, lounges, fitness facilities, outdoor terraces, and a programme of resident events designed to foster community interaction. Studios are available at starting from £1,475/month.

1.23 Dandi Wembley is designed to accommodate a range of residents, including young professionals, key workers, and individuals seeking flexible, all-inclusive accommodation.

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Policy Review



National Planning Policy Framework

December 2024

Policy Review

2.1 This Assessment reviews the National Planning Policy Framework ('NPPF'), the London Plan (2021), the London Plan Guidance on Purpose-Built Large-Scale Shared Living (2024), and Haringey's Local Plan Strategic Policies 2013–2026, alongside relevant supporting documents including the Tottenham Area Action Plan (2017), the Shaping Tottenham Strategy (2024), as well as documents produced as evidence to support the development of the emerging Local Plan. Together, these documents provide the policy context for this Assessment and establish the role of shared living as an emerging housing typology within the relevant planning framework.

National Planning Policy

2.2 The National Planning Policy Framework ('NPPF') (as revised December 2024) reflects the planning objectives of the national government. Section 5 'Delivering a sufficient supply of homes', focuses on developing strategic policies that ensure there is a sufficient number of homes that meet the needs of groups with specific housing requirements. *"Within this context of establishing need, the size, type and tenure of housing needed for different groups in the community should be assessed and reflected in planning policies."* (NPPF, 2024, Paragraph 63).

2.3 The NPPF also states that *"Mixed tenure sites can provide a range of benefits, including creating diverse communities and supporting timely build out rates, and local planning authorities should support their development through their policies and decisions."* (NPPF, 2024, Paragraph 71). While the scheme in itself already proposes a mix of tenures, shared living contributes to mixed and diverse communities by providing purpose-built accommodation for single-person household demographics.

2.4 The NPPF encourages the efficient use of land and supports the delivery of a diverse housing stock that responds to evolving demographic trends. Within this context, alternative housing models that optimise density while maintaining high living standards can play an important role in boosting housing supply, particularly in highly accessible urban locations. The Site and the proposed shared living scheme align with this principle.

Regional Planning Policy

2.5 The London Plan (2021) is the prevailing spatial development strategy for London. The London Plan recognises shared living as part of a diverse housing market, and as a housing typology capable of responding to structural shifts in household composition across the capital.

Draft London Plan 2026

2.5 The emerging Draft London Plan 2026 was published by the Mayor for consultation in July 2026 and, once adopted, will replace the 2021 London Plan as the capital's spatial development strategy

London's Housing Needs

2.6 London Plan Policy GG4 ('Delivering the Homes Londoners Need') identifies housing delivery as a strategic priority, emphasising the need to significantly increase supply to support a growing and evolving population. The policy echoes the NPPF and promotes the optimisation of well-connected sites and encourages a varied housing offer responsive to differing household structures.

2.7 Within this context, alternative residential models such as shared living can support delivery by broadening tenure choice and addressing segments of demand not readily accommodated within conventional housing stock.

2.8 The first regional planning guidance to discuss shared living is the Mayor of London's Housing Supplementary Planning Guidance ('SPG') (2016). The SPG identified large-scale purpose-built shared living as having a potential role in meeting housing needs, particularly for single-person households, provided schemes achieve a high standard of design and management.

Shared Living Policy Framework

2.9 In Chapter 4 of the London Plan 'Housing', Policy H16 ('Large-scale purpose-built shared living') of the London Plan establishes the principal framework for assessing shared living developments. The policy recognises shared living as a distinct residential product that can contribute to housing supply where it meets an identified need and is delivered to a high

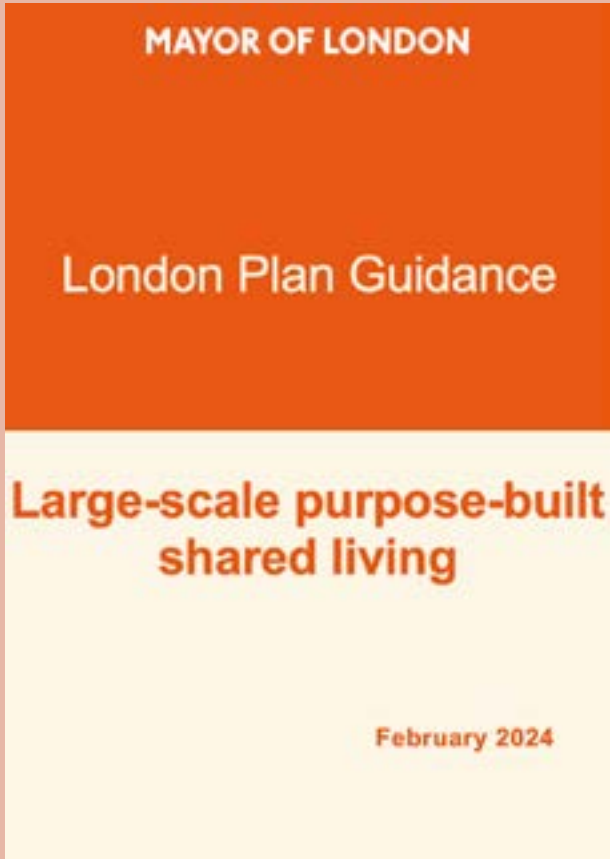
standard of design and management. Proposals are expected to be located in accessible areas, operate under single management, provide minimum three-month tenancies, and include a comprehensive range of communal amenities. Importantly, Policy H16 emphasises that developments must support mixed and inclusive neighbourhoods and not undermine delivery of conventional self-contained housing.

2.10 Policy H16 confirms that shared living schemes contribute to housing delivery targets, albeit in a modified way. While classified as a sui generis use, shared living contributes to the London Plan's housing trajectory through a discounted delivery ratio of 1.8:1, enabling boroughs to make measurable progress towards strategic housing targets.

Affordability and Design Standards

2.11 Under London Plan Policy H4 ('Delivering affordable housing'), affordable housing is required to meet the same design and quality standards as market housing, including





compliance with minimum space standards (Policy D6), accessible and adaptable dwelling requirements (Policy D7), and tenure-blind design principles. Affordable homes must be provided as self-contained Class C3 units, with full private kitchens and bathrooms, and are subject to specified tenure splits (e.g., social rent, London Affordable Rent, Discount Market Rent) and nomination agreements with the local authority. In addition, affordable housing is typically secured through Section 106 obligations with regulated rent levels and long-term management arrangements. As shared living is classified as sui generis and does not provide self-contained C3 dwellings, it cannot be counted towards affordable housing provision under London Plan policy.

2.12 While shared living does not meet the policy requirements of affordable housing, relative to other open market private rented sector options available to single-person households, the all-inclusive pricing model can present a competitive rental option.

2.13 Shared living developments are also expected to achieve high-quality design standards consistent with Policy D6, ensuring that compact private living spaces are balanced by well-designed communal environments.

LPG Assessment Criteria

2.14 In February 2024, the Mayor of London released London Plan Guidance on Large-Scale Purpose-Built Shared Living ('LPG'), which provides detailed direction on the planning and design of shared living developments. The LPG states that shared living is a type of housing that addresses the specific needs of single-person households who would otherwise live in a shared rental house or flat. The LPG distinguishes shared living from self-contained homes (Class C3), HMOs, hotels and hostels (C1), C2 residential institutions, and student accommodation. It clarifies that shared living units are self-contained, require minimum tenancies of no less

than three months, do not provide care, and are not student focused.

2.15 The LPG states that *"LSPBSL (shared living) developments should be located and designed to contribute positively to the character of the area; and the creation of mixed and inclusive neighbourhoods."* By emphasising a mix of housing tenures, typologies and sizes, the London Plan and supporting LPG make clear that shared living should complement, rather than displace, conventional housing provision. In this context, policy seeks to avoid over-concentration of any single form of accommodation within a locality.

2.16 The LPG details recommended benchmarks for internal communal amenity space for shared living development (see table below). Using these benchmarks, with 530 shared living units, the recommended internal amenity space for the proposed scheme is 1,560 sqm.

2.17 Together, these regional policies establish clear guidance through which the suitability of shared living proposals can be assessed at the local level.

RECOMMENDED BENCHMARKS FOR TOTAL INTERNAL COMMUNAL AMENITY SPACE (LPG)

Number of Residents	Benchmarked Internal Amenity Space
Up to 100	4 sqm per resident
Every additional resident from 101 to 400	3 sqm per additional resident
Every additional resident	2 sqm per additional resident

Local Planning Policy

2.18 Haringey's Local Plan Strategic Policies 2013 to 2026 (as amended in 2017) ("the Local Plan") provides the statutory framework for growth and development across the borough, setting out how the Council will address housing, employment, leisure and retail needs. Alongside the Tottenham Area Action Plan (2017) ("the AAP"), the emerging Local Plan, and the Shaping Tottenham Strategy (2024), it establishes the policy framework against which residential development proposals are assessed. Although purpose built shared living is an emerging housing typology, the strategic objectives of these documents relating to housing delivery, housing choice, tenure diversification, and sustainable growth provide a supportive policy context for the proposed development.

Housing Need and Delivery

2.19 The Local Plan identifies significant housing pressures facing Haringey, including a high demand for housing across all tenures. In response, Strategic Policy SP2 ('Housing') seeks to provide homes that meet Haringey's housing needs in terms of affordability, quality and diversity, whilst supporting the creation of mixed and balanced communities. The Local Plan also identifies Tottenham Hale as a key Growth Area and expects development to contribute towards the delivery of new homes across the borough. Together, these policies support the delivery of a diverse range of housing typologies that contribute towards housing supply and respond to identified housing needs.

2.20 Beyond meeting overall housing demand, local planning policy seeks to ensure that the borough's housing stock addresses the needs of a diverse population. Strategic Policy SP2 ('Housing') supports the delivery of a varied housing offer capable of meeting different housing needs. In addition, AAP provides the planning framework for the continued growth and regeneration of Tottenham Hale. Within this framework, Policy AAP3 ('Housing') seeks to "improve the range and choice of homes available to residents" in order to support inclusive and mixed communities. In this context, the proposed shared living development would broaden housing choice for single-person households by introducing a housing typology that is currently not present in the borough. In doing so, it would help meet identified housing needs whilst reducing pressure on the existing C3 private rented housing stock.

Emerging Policy Direction

2.21 The Shaping Tottenham Strategy (2024) sets out the Council's long-term vision for growth and regeneration across Tottenham, informed by extensive community engagement. The Strategy identifies housing affordability, overcrowding and poor living conditions as key challenges facing local communities and highlights the need to deliver a greater range of high-quality homes at different levels of affordability. These objectives reinforce the Council's ambition to broaden housing choice and improve the quality of housing available to existing and future residents.



2.22 The Council's emerging approach to shared living is set out in Policy H8 ('Large-scale Purpose-built Shared Living') of the emerging Local Plan. Building on the requirements of London Plan Policy H16 ('Large-scale Purpose-built Shared Living'), Policy H8 introduces additional local criteria requiring that shared living schemes contribute to mixed and inclusive neighbourhoods, avoid an over-concentration of single-person accommodation, provide high-quality communal facilities and long-term professional management, contribute towards the provision of conventional affordable housing and promote integration with the surrounding community through communal workspace. These additional requirements ensure that shared living

schemes respond positively to Haringey's housing priorities and place-making objectives.

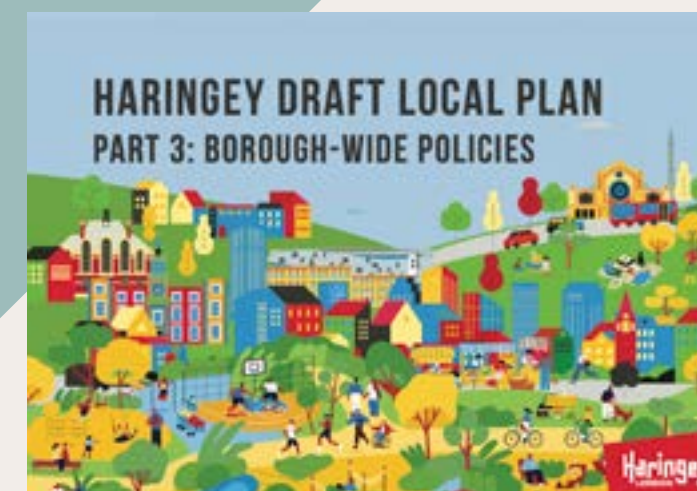
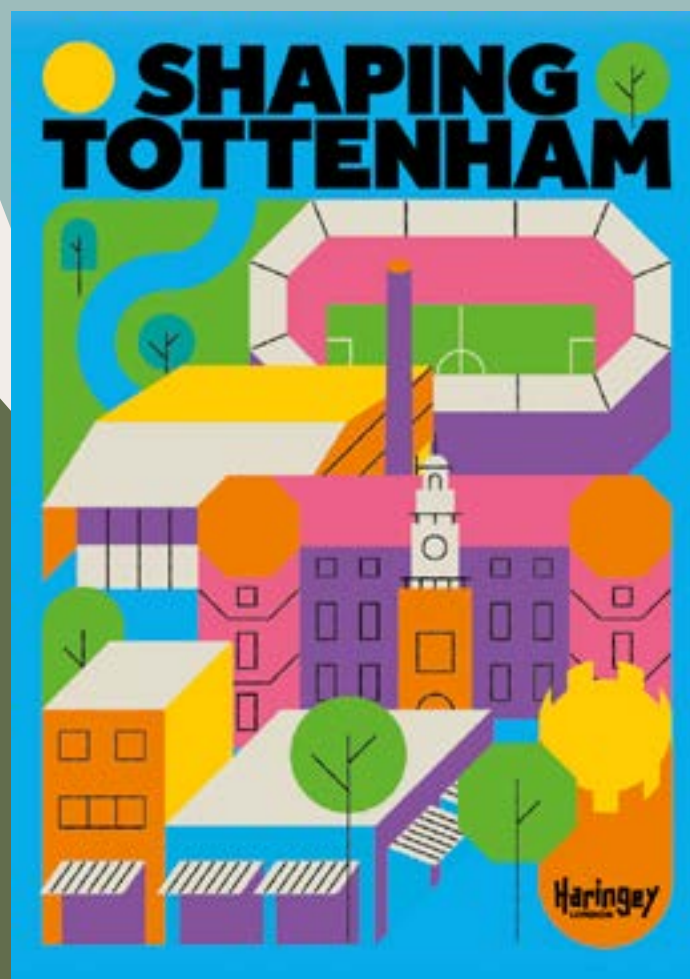
2.23 Collectively, these requirements demonstrate that the Council recognises a role for shared living within the borough's future housing offer, provided that schemes are appropriately located, designed and managed.

Site-Specific Policy Guidance

2.24 The Site is located within Tottenham Hale, which is identified within the AAP as a key focus area for regeneration and growth. Benefitting from excellent public transport accessibility (PTAL 5), the Site occupies a highly accessible location immediately adjacent to Tottenham Hale Station. Policy TH1 ('District Centre in Tottenham Hale') seeks to support the creation of a new district centre surrounding Tottenham Hale Station, incorporating "*a mix of residential and employment uses*" alongside town centre functions. The policy envisages Tottenham Hale as a highly accessible and sustainable location capable of accommodating significant growth whilst supporting the development of a mixed and balanced community. The delivery of new homes forms an important component of this vision, helping to support a growing residential population and the long-term vitality of the emerging district centre. Within this context, shared living represents an appropriate form of residential development, capable of contributing towards both housing delivery and the wider regeneration aspirations for Tottenham Hale.

2.25 The Site is identified within both the adopted AAP and the Council's emerging Local Plan as a location suitable for comprehensive redevelopment. Within the AAP, Site Allocation TH5 ('Station Square North') allocates the Site for redevelopment to deliver a mix of town centre, residential and commercial uses. Similarly, the emerging Local Plan identifies the Site as Allocation THSA03 ('Ashley Link'), supporting a comprehensive mixed-use scheme comprising residential, town centre and employment uses.

2.26 Collectively, the local planning policy framework supports the delivery of new homes within highly accessible locations and seeks to respond to identified housing pressures through the provision of a diverse range of housing options. Throughout the existing and emerging planning frameworks and strategies, Tottenham Hale is identified as a key location for growth and regeneration, where new development is expected to contribute towards housing delivery, mixed communities and the creation of a vibrant district centre. Within this context, shared living represents a compatible and policy-aligned form of residential development, capable of contributing towards housing supply, housing choice and the wider regeneration objectives identified for Tottenham Hale.



Demographics

Population Profile
of LB Haringey



264,234

Population



66.3%

Single/Unmarried

+5.3% vs. London



67.8%

Economically Active

+4.3% vs. London



45.8%

Not Born in the UK

+5.2% vs. London



43.1%

Between 25–49 Years Old

+2.3% vs. London

Area Profiles

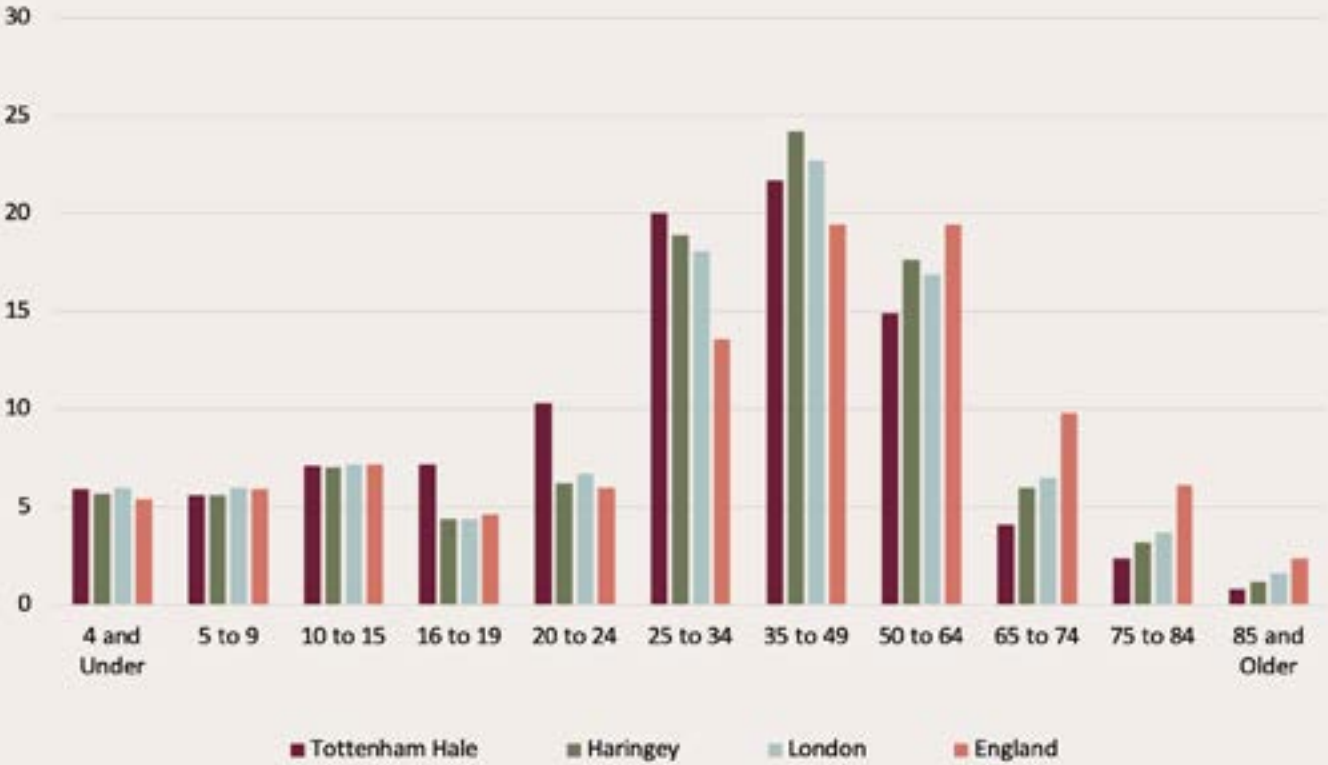
3.1 Demographic data for both the London Borough of Haringey and Tottenham Hale Ward was assessed against London (regional) and England (national) comparators to understand the demographical character of the Study Area. Both individual-level population data (demographic profile) and household-level data were analysed. All figures are derived from the 2021 Census via the ONS Nomis service.

Demographic Profile

3.2 According to the 2021 Census, the largest five-year age cohort in LB Haringey is 30–34 years (9.8% of the population), closely followed by those aged 25–29 (9.1%) and 35–39 (8.9%). Overall, residents aged between 25 and 49 account for 43.1% of the borough's population, compared with 40.8% across London and 33.0% nationally, demonstrating a particularly strong concentration of working-age adults and aligning with the primary age profile typically associated with shared living residents (25–45 years).

3.3 Married or civil partnered residents account for 33.7% of LB Haringey's population aged 16 and over, below both the London average (40.0%) and the England average (44.7%). By contrast, residents who are single, divorced, separated, widowed or have never entered a marriage or civil partnership account for 66.3% of the borough's population, compared with 60.0% across London and 55.3% across England. This demonstrates that LB Haringey has a comparatively high concentration of single adults.

3.4 Residents born in the UK account for 54.2% of LB Haringey's population, below the London average



(59.4%) and significantly below the England average (82.6%). Longer-term international residents (10+ years in the UK) comprise 27.3% of the population, above London (24.3%) and significantly higher than England (10.1%). More recent arrivals (less than 10 years in the UK) account for 18.6%, broadly consistent with London (16.4%) and exceeding national levels (7.2%). This reflects a particularly mobile and internationally diverse population base, with both recent and long-term international residents represented at levels above national averages.

3.5 67.8% of residents aged 16 and over are economically active, exceeding both the London average (63.5%) and England (59.4%). Economic inactivity stands at 32.3%, below the London average (36.5%), indicating a strong working-age population within the borough. Whilst the unemployment rate of 5.6% is marginally above the London average (4.8%), the overall data suggests that Haringey supports a large economically active population with strong participation in the labour market.

3.6 Socio-economic classification data indicates that lower managerial, administrative

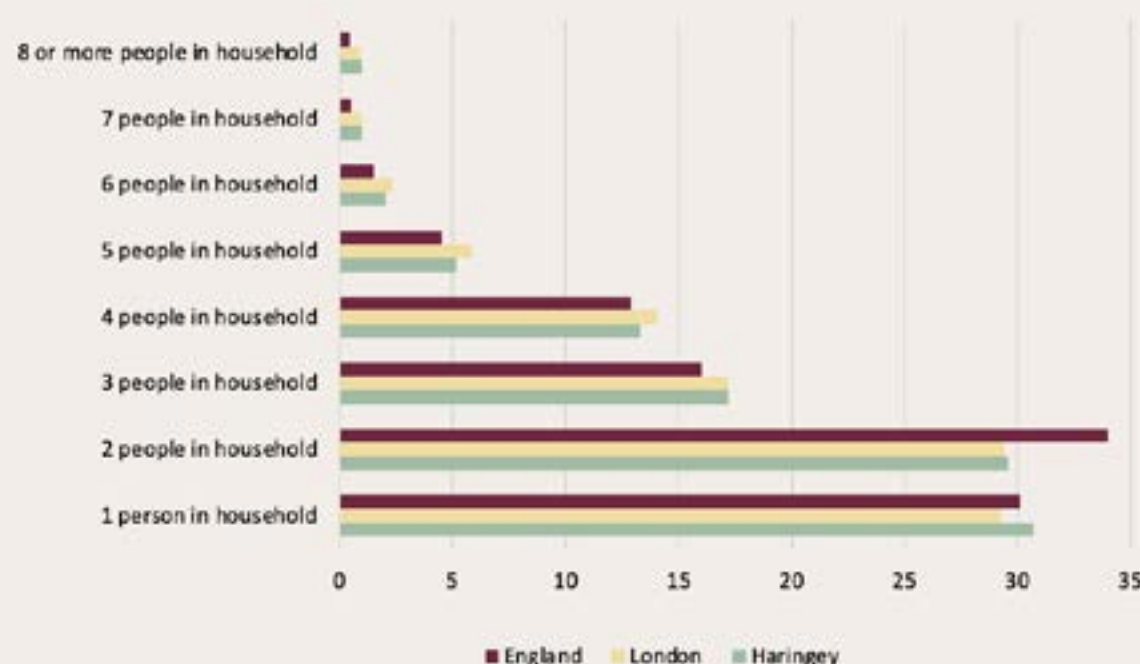
and professional occupations form the largest occupational group within LB Haringey, accounting for 20.9% of residents. This is slightly above both the London (20.6%) and England (19.9%) averages. A further 15.8% of residents are employed in higher managerial, administrative and professional occupations, below the London average (17.6%) but above England (13.2%). Compared with England, the borough also has a lower proportion of residents employed in intermediate, semi-routine and routine occupations. Overall, this reflects a relatively skilled workforce with a strong representation of professional occupations.

3.7 Overall, the demographic profile of LB Haringey indicates a diverse, internationally connected and economically active population, characterised by a comparatively high proportion of working-age residents, single adults, economically active residents and professional occupations. Compared with both London and England, the borough also has a larger proportion of residents born outside the UK and a greater concentration of adults living outside couple households. Together, these characteristics demonstrate a demographic profile that aligns closely with an associated target market for shared living developments.

Demographic Profile of Households

3.8 Household composition in LB Haringey reflects a balanced distribution across household sizes, with one person households comprising 30.7% of all households in the borough, in line with both London (29.3%) and England (30.1%). Two person households account for 29.6%, broadly aligned with London (29.4%) and slightly below England (34.0%). Together, one and two person households account for over 60% of all households, reflecting the important role that smaller household types play within the borough's overall housing profile.

PERCENTAGE OF HOUSEHOLDS BY SIZE



3.9 Larger households form a meaningful part of LB Haringey's housing profile. Three-person households account for 17.2% of households, matching the London average (17.2%), whilst four-person households represent 13.3%, broadly comparable to both London (14.1%) and England (12.9%). Five- and six-person households are also present at levels similar to London-wide proportions. Collectively, these figures indicate that family households represent an established component of the borough's residential population, alongside its significant proportion of smaller and single-person households.

3.10 Single-family households comprise 55.6% of all households in LB Haringey, slightly below both the London average (58.0%) and England (63.0%). One-person households account for 30.7% of all households, slightly above the London average (29.3%). Together, these figures indicate a household profile characterised by a significant presence of one-person, non-family and non-couple households.

3.11 In terms of number of bedrooms, the housing stock is weighted towards smaller dwellings. One-bedroom homes comprise 26.2% of stock, above the London average (21.2%), whilst two-bedroom homes account for 32.6%, also exceeding London (31.4%). By contrast, three-bedroom properties represent 23.6% of stock, below the London average (29.5%), whilst homes with four or more bedrooms account for 17.6%, slightly below both London (17.9%) and England (21.1%). The comparatively high proportion of one- and two-bedroom homes reflects the borough's existing demographic profile and indicates an established demand for smaller forms of accommodation, providing a supportive context for shared living development.

3.12 Owner-occupied homes comprise 37.2% of households in LB Haringey, lower than both the London average (45.2%) and England (61.3%). Private rented households account for 35.6% of all households, exceeding both London (30.0%) and England (20.5%). Social rented homes represent a further 25.2% of households, slightly above the London average (23.1%). This tenure profile demonstrates that LB Haringey already has a

well-established private rented sector, indicating a strong local demand for rented accommodation and providing a supportive context for shared living as an alternative form of professionally managed rental housing.

3.13 Converted or shared dwellings comprise 22.8% of homes in LB Haringey, significantly above both England (3.5%) and London (11.1%). Purpose-built flats account for a further 35.4% of stock, exceeding the national proportion (17.1%) whilst remaining below the London average (40.3%). Together, these housing types account for 58.2% of all homes, demonstrating that higher-density and shared forms of accommodation already represent a substantial and well-established component of the borough's housing stock.

3.14 Overall, LB Haringey supports a diverse range of household types and a housing stock weighted towards smaller dwellings and higher-density forms of accommodation. The borough is characterised by relatively high proportions of single adults, one-person households, private renters and apartment-based housing when compared with national averages.

Profile of Households in LB Haringey



105,092

Households



55.5%

Not Living in a Couple

+5% vs. London



26.2%

One Bedroom Homes

+5% vs. London



30.7%

One-Person Households

+1.4% vs. London



35.6%

Living in a converted or shared house

+5.6% vs. London

Profile of Tottenham Ward


4,036
Households


12,177
Population

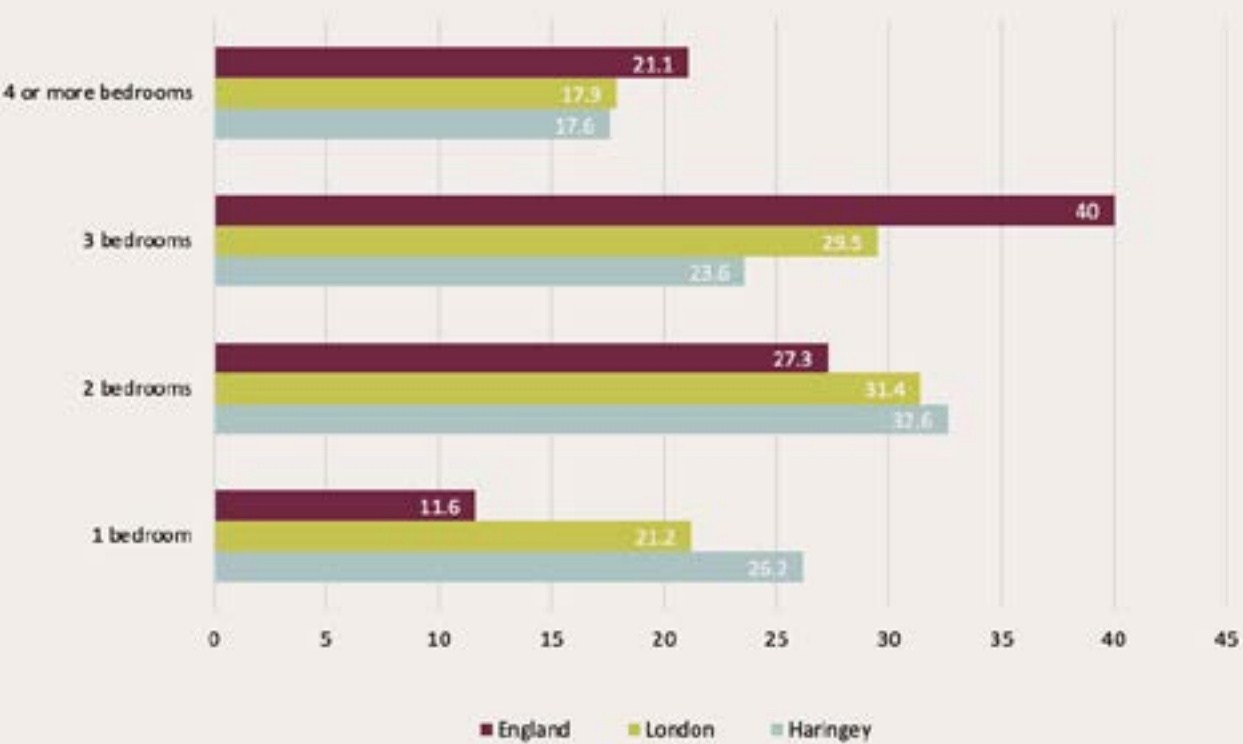

26.1%
One-Person Households
-4.6% vs. LB Haringey


54.2%
Not Born in UK
+8.4% vs. LB Haringey

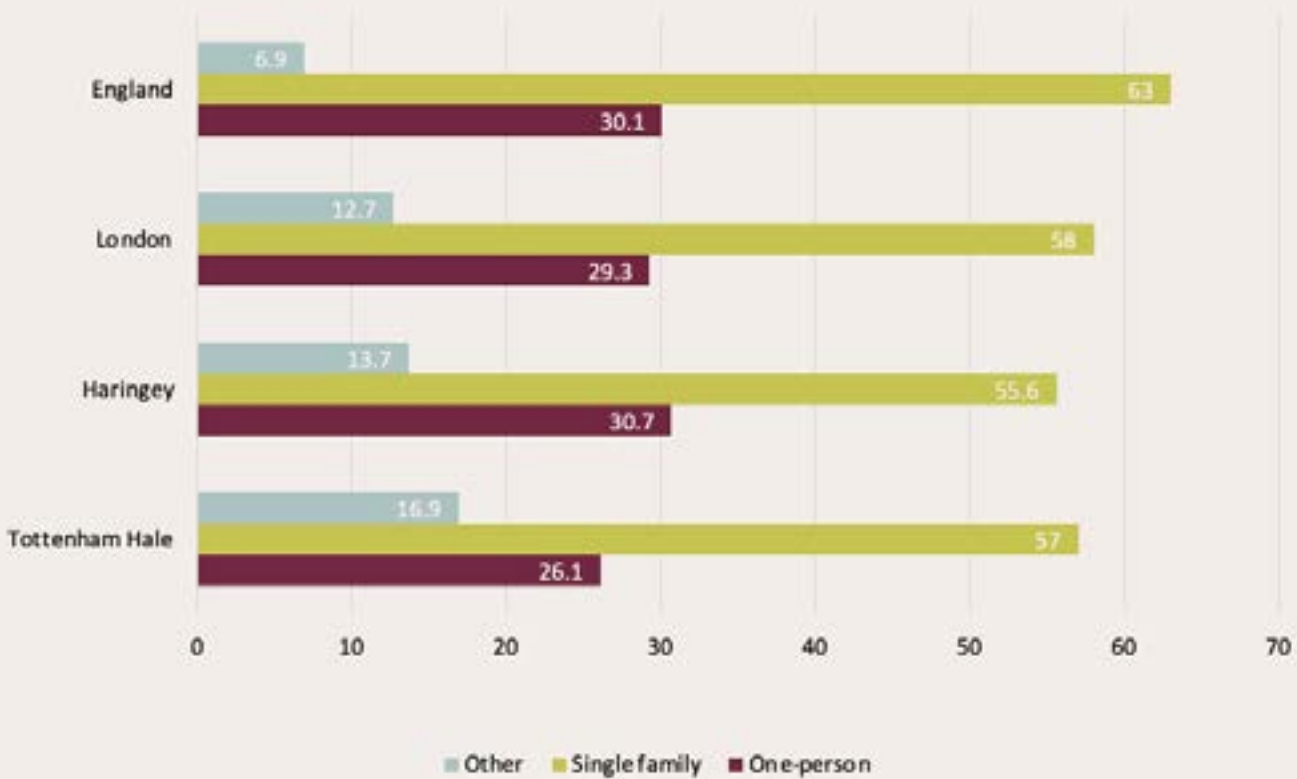

64.7%
Not living in a Couple
-3.1% vs. LB Haringey


51.8%
Living in Purpose-Built Flats
+12.4% vs. LB Haringey

PERCENTAGE OF HOUSING STOCK BY NUMBER OF BEDROOMS



PERCENTAGE OF HOUSEHOLDS BY COMPOSITION



Demographic Profile of Tottenham Ward

3.15 Ward-level census data is more limited than borough-level data, particularly in relation to detailed economic and socio-economic classifications. However, headline population, household composition, tenure and occupational data provide a useful micro-level profile of the immediate local context in which the Site is located.

3.16 Tottenham Hale Ward comprises 4,036 households and 12,177 residents. One person households account for 1,054 households (26.1%) in Tottenham Hale Ward, below the borough wide proportion (30.7%), the London average (29.3%) and the England average (30.1%). Similarly, single family households represent 57.0% of households, below both the London (58.0%) and England (63.0%) averages. These figures indicate that larger and multi person households form a comparatively greater proportion of the ward's residential profile, reflecting a diverse mix of household types within the local area.

3.17 The tenure profile broadly reflects the borough average, although Tottenham Hale exhibits lower levels of owner occupation and a higher proportion of social rented housing. Private rented households account for 35.7% of all households, broadly aligned with LB Haringey (35.6%) and above the London average (30.0%). Owner-occupied housing accounts for 19.8% of households, whilst social rented housing represents 32.6%, significantly above both the borough and London averages. Together, these figures indicate a housing market where rental accommodate is standard practice.

3.18 The age profile is weighted towards working-age adults. Residents aged 35-49 comprise 21.7% of the population, whilst a further 20.0% are aged 25-34. Together, these age groups account for 41.7% of the ward's population, indicating a substantial concentration of residents within age cohorts commonly associated with the shared living target demographic. This is broadly comparable to the borough-wide proportion of 43.1%.

3.19 Tottenham Hale Ward supports a diverse occupational profile. Of the 9,916 residents aged 16 and over, 24.7% are employed in managerial and professional occupations, whilst a further 19.9% are

employed in intermediate occupations or are small employers and self-employed workers. The ward also contains a notable student population, with full-time students accounting for 18.6% of residents aged 16 and over. This reflects a mixed population of professionals, students, independent workers and intermediate occupations.

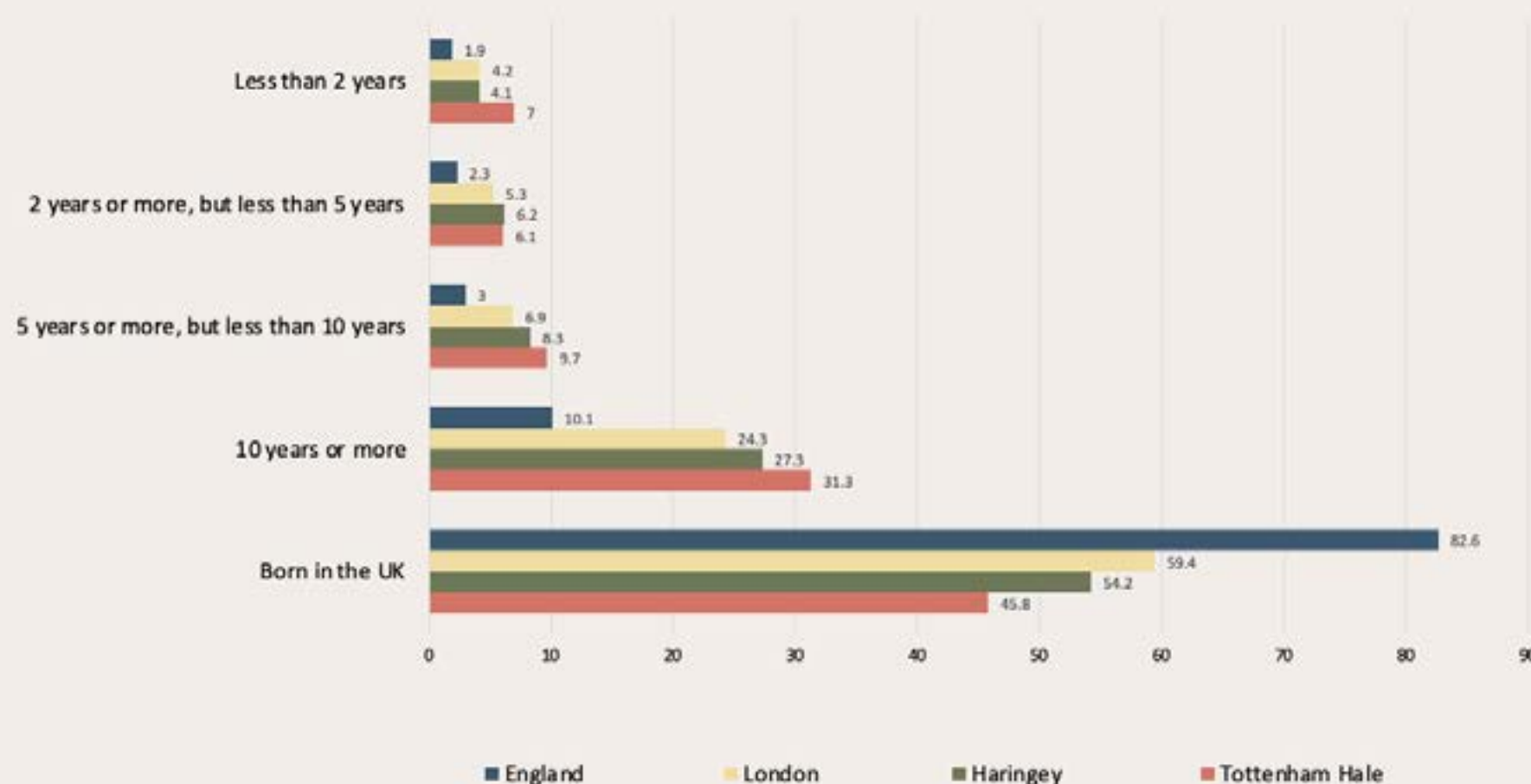
3.20 In housing typology terms, 51.8% of homes in Tottenham Hale Ward are purpose-built flats, significantly above the borough average (35.4%), the London average (40.3%) and the England average (17.1%). Together, these figures indicate that higher-density forms of accommodation are already a dominant feature of the local built environment.

3.21 Tottenham Hale Ward also exhibits a comparatively internationally mobile population. Only 45.8% of residents were born in the UK, lower than Haringey (54.2%), London (59.4%) and substantially below England (82.6%). Residents who have lived in the UK for under two years account for 7.0% of the ward population. This is notably higher than LB Haringey (4.1%), London (4.2%) and England (1.9%). This reflects a locally mobile and internationally connected resident base.

3.22 Overall, Tottenham Hale Ward exhibits a demographic and housing profile characterised by a high proportion of working-age residents, a substantial rented sector, a diverse international population and a housing stock dominated by

higher-density forms of accommodation. The ward also supports a significant proportion of non-family households and residents living within apartment-based housing. Together, these characteristics distinguish Tottenham Hale from national averages and reflect its role as a dense, well-connected and evolving urban neighbourhood with an established population of renters, working-age adults and residents living in higher-density forms of accommodation.

POPULATION DISTRIBUTION BY LENGTH OF RESIDENCE IN THE UK



Residential profile.

3.23 To understand the local residential profile, the Output Area Classification (OAC), developed by the Consumer Data Research Centre, has been analysed. OAC is a UK-wide geodemographic framework that classifies small areas (Output Areas) using census data, grouping locations with similar demographic, socio-economic, and housing characteristics.

3.24 The classification highlights key structural trends, including ageing populations, shifts in housing tenure, and increasing ethnic diversity. The 2021 classification reflects post-pandemic changes such as higher levels of homeworking, altered mobility patterns, and a growing convergence between urban and rural characteristics. As a result, OAC serves

as a valuable tool for informing planning, commercial strategy, and service provision through an evidence-led understanding of local populations.

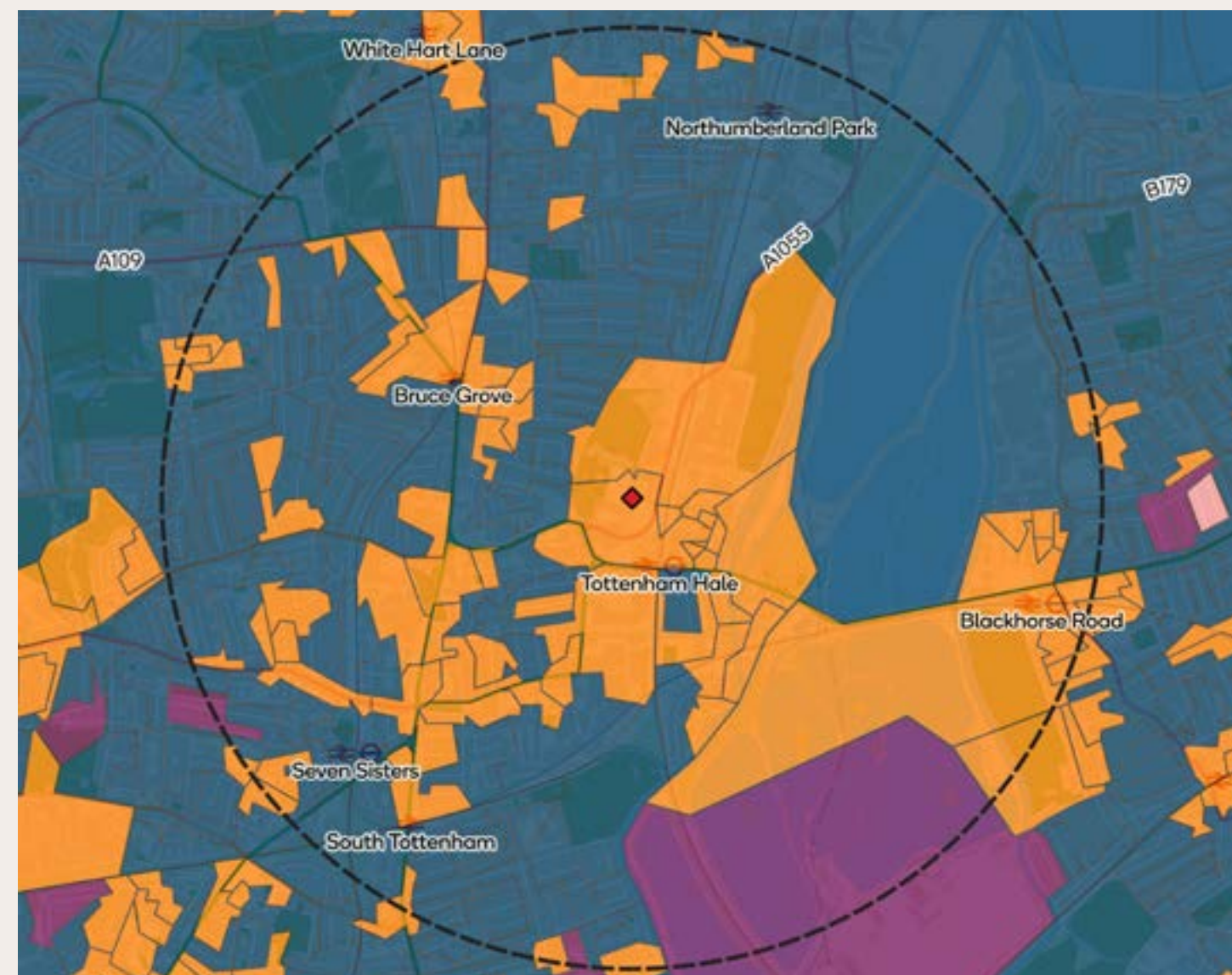
3.25 For this assessment, 232 Output Areas within the Study Area have been analysed at the OAC supergroup level, which is the broadest classification tier. This approach enables a clear benchmarking of local characteristics against national averages, providing a high-level view of the area's consumer profile and how it compares within a wider UK context. Descriptions of top two Supergroups that make up the Study Areas are listed below.

SG 3: Multicultural and Educated Urbanites: 80/232 OAs (34.5%)

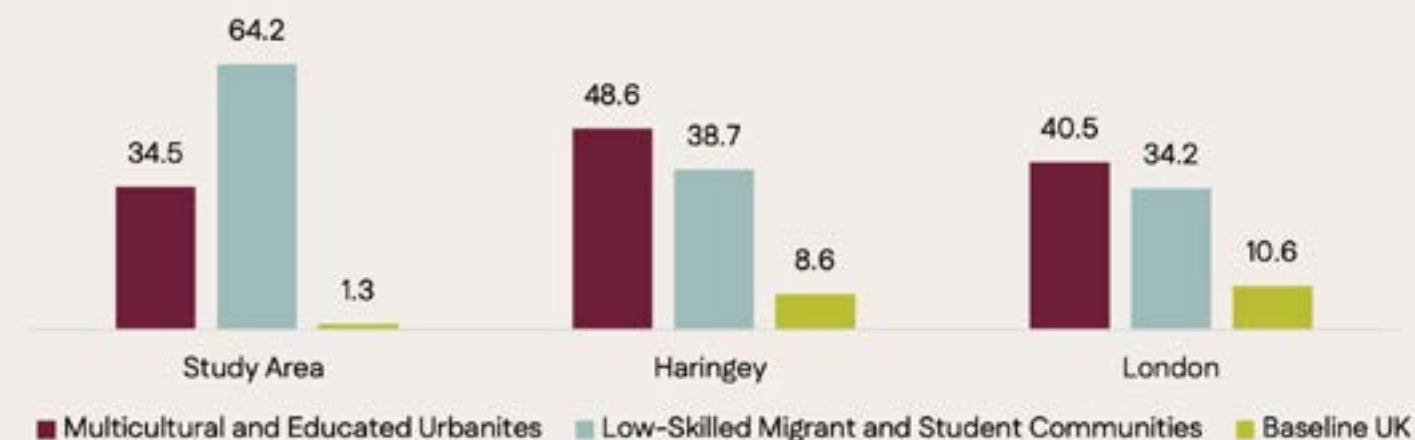
Established populations comprising ethnic minorities together with persons born outside the UK predominate in this Supergroup. Residents present diverse personal characteristics and circumstances: while generally well-educated and practising skilled occupations, some residents live in overcrowded rental sector housing. English may not be the main language used by people in this Group. Although the typical adult resident is middle aged, single person households are common, and marriage rates are low by national standards. This Supergroup predominates in Inner London, with smaller enclaves in many other densely populated metropolitan areas.

SG 4: Low-Skilled Migrant and Student Communities: 149/232 OAs (64.2%)

Young adults, many of whom are students, predominate in these high-density and overcrowded neighbourhoods of rented terrace houses or flats. Most ethnic minorities are present in these communities, as are people born in European countries that are not part of the EU. Students aside, low skilled occupations predominate, and unemployment rates are above average. Overall, the mix of students and more sedentary households means that neighbourhood average numbers of children are not very high. The Mixed or Multiple ethnic group composition of neighbourhoods is often associated with low rates of affiliation to Christian religions. This Supergroup predominates in non-central urban locations across the UK, particularly within England in the Midlands and the outskirts of west, south and north-east London.



OUTPUT AREA CLASSIFICATION %



Age Range

25–44 Years

HousingRented Flats,
Shared living**Technology Use**

High

**Entertainment & Leisure****Entertainment:** Yonder Indoor Climbing Gym, Lee Valley Park Playing Fields**F&B:** The Engine House Cafe, Pressure Drop Brewery and Taproom, Brazil's Burger**Green spaces:** The Paddock Community Nature Reserve, Walthamstow Wetlands**Household & Clothing****Fashion:** Weekday, UNIQLO, H&M, Independent Retailers**Homeware:** ProCook, TK Maxx, John Lewis & Partners**Supermarket**

Tesco, Sainsbury's, Lidl

Multicultural and Educated Urbanites (80 OAs)

3.26 Building on our broader demographic profile, the two key groups within the second most common “Multicultural and Educated Urbanites” supergroup reveal distinct yet complementary community fabrics. One cluster comprises young, ethnically diverse families with many parents born overseas raising toddlers in compact flats (3B) while the other is characterised by well-educated, career-focused singles drawn to urban opportunity (3C).

3.27 Together, they reflect a population that is youthful, internationally rooted, professionally ambitious, and firmly embedded in high-density rental living. These insights help to understand the local social dynamics, informing strategies to celebrate cultural richness, support family needs, and cater to a digitally savvy, single-professional cohort.

3A: Student Living and Professional Footholds (4 OAs)

This group is dominated by students and young professionals, often living in flats or communal residences, with single-person households most common. The population is typically aged 25–44, with few families and high residential turnover. There is a diverse ethnic mix, including many EU-born White residents. Households are often privately rented and can be overcrowded. Most residents are degree-educated professionals or technicians. This group is prevalent in university towns and cities, particularly near established campuses.

3B: Ethnically Diverse Young Families (61 OAs)

This neighbourhood segment is home to young parents often born internationally raising children aged 0–4 in flats that are frequently socially rented and, at times, overcrowded. Mixed-ethnicity households are common, and English may not be the primary language spoken at home. Alongside full-time carers, you'll find students and residents in low-skilled roles, with unemployment rates above the national average. These family units bring vibrancy and cultural variety to the area, highlighting the need for accessible childcare, multilingual community services, and versatile play-space design.

3C: Diverse Educated Urban Singles (15 OAs)

Predominantly aged 25–44, this group comprises unmarried individuals living without dependants in privately rented flats that can be lightly overcrowded. Ethnic diversity is strong, though Asian representation is lower than other minority groups. High levels of tertiary education and professional or managerial employment define daily life here, as does a low incidence of disability and formal religious affiliation. Homeworking is common, reflecting robust digital connectivity. These singles drive the local economy, seeking vibrant retail, leisure amenities, and flexible workspace options.



04

Engagement Findings

On-Site Engagement

4.1 To supplement desk-based research and develop a qualitative understanding of the local housing market, survey work was undertaken on 15 June 2026. In total, 50 responses were collected from individuals who live, work or regularly visit Tottenham Hale.

4.2 The survey aimed to capture respondents' perceptions of the local housing market and the extent to which current provision meets, or fails to meet, their needs. Opinions regarding the existing commercial offering on site were also sought.

4.3 AND researchers were positioned in and around Ashley Road, near the Tottenham Hale Underground Station, as well as in the immediate vicinity of the Site. This enabled respondents to consider and engage with the proposals spatially, with the Site used as a reference point during conversations.

4.4 Respondents were asked a structured series of ten questions. The first four captured key demographic characteristics, including respondents' reason for being in Tottenham Hale, household composition (living alone, as a couple, with family, or with housemates), tenure status and age.

4.5 The following three questions focused on respondents' experiences of the local rental market. Participants were asked to reflect on current private rental housing market conditions in Tottenham Hale, before being introduced to the concept of shared living and invited to comment on its suitability in the local context.

4.6 Collectively, this engagement provides a qualitative evidence base to test perceived market demand and to ensure that the assessment is informed by local insight.



Who We Spoke To

4.7 Just under half of respondents (42%) lived in Tottenham, providing a strong representation of local residents. A further 16% worked in the area, whilst 18% visited Tottenham regularly and another 18% were visiting at the time of the survey. The remaining respondents (6%) were travelling through the area or visiting for specific purposes.

4.8 36% of respondents lived by themselves, while an equal proportion (36%) lived with their family. A smaller proportion of respondents lived in a couple (16%) or shared accommodation with roommates (12%). Overall, the survey captured views from a range of household types, including a notable proportion of single-person households.

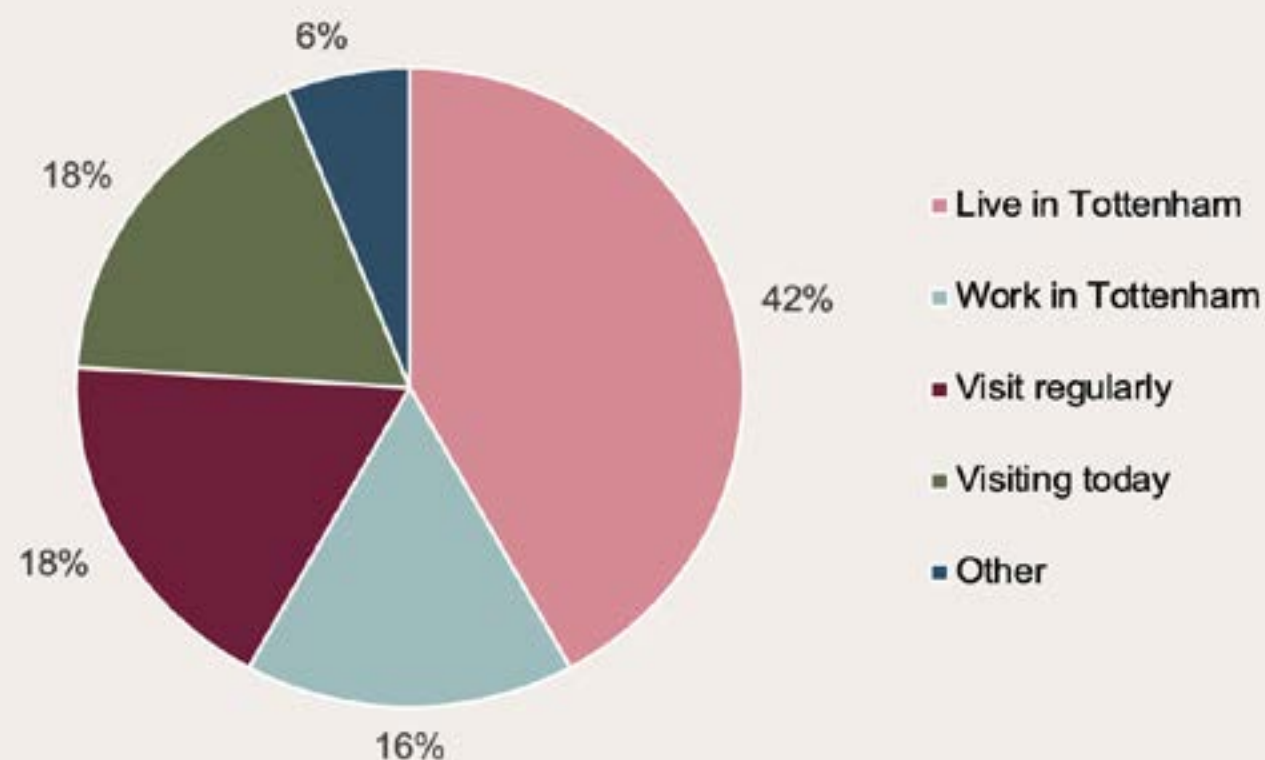
4.9 Almost half of respondents (48%) were aged between 19 and 30, representing the highest proportion of respondents. This was followed by respondents aged 31 to 45, who accounted for just over a quarter of responses (26%). A further 18% of respondents were aged between 46 and 65. Only a small proportion of respondents were either under 18 (6%) or aged 66 and above (2%).

4.10 The majority of respondents (74%) rented their home, indicating that the survey captured a significant proportion of people actively participating in the private rented sector. Of those renting, 29 respondents (78%) were aged between 19 and 45, including 21 respondents (57%) aged 19-30, demonstrating that the survey captured a strong representation of younger adults relying on the private rented sector.

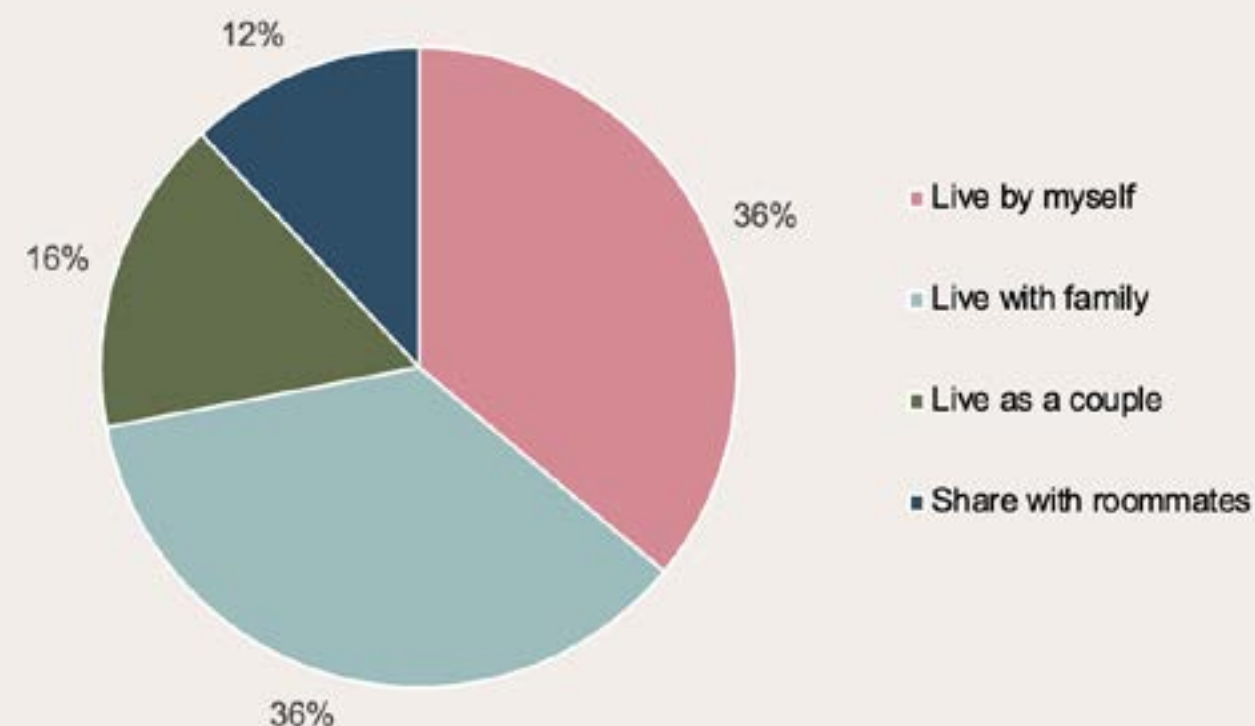
4.11 Whilst 74% of respondents rented their home, relatively few younger respondents living in Tottenham occupied independent accommodation. Respondents aged 19-30 were more commonly living with family members or sharing accommodation with roommates. This suggests that market

constraints may be influencing housing choices amongst younger adults and highlights the potential role of alternative housing models, such as purpose-built shared living, in broadening housing options for this demographic in the local area.

WHAT BRINGS YOU TO TOTTENHAM HALE TODAY?



WHICH OF THESE BEST DESCRIBES YOUR LIVING SITUATION?



|What We Heard

Tottenham Today

4.12 Perceptions of Tottenham's rental market were largely negative. More than half of respondents (54%) described the market as "expensive", "very expensive", "overpriced" or "unaffordable", whilst a further 12% characterised it as "difficult" or "hard to navigate". By contrast, only two respondents expressed a neutral view of the rental market, whilst seven stated that they were unsure. No respondents described the rental market in positive terms.

4.13 Amongst respondents who viewed the rental market negatively, several referred to the high cost and limited availability of suitable accommodation for young people, single-person households and families. Comments described the market as "very hard to navigate", "not affordable at all", and "ignorant towards young people who want to rent but can't afford to."

4.14 When asked how easy or difficult it is to find suitable rental accommodation in Tottenham, 60% of respondents considered the process to be either somewhat difficult (36%) or very difficult (24%). A further 36% described it as neither easy nor difficult, whilst only 4% considered it somewhat easy. No respondents stated that finding suitable rental accommodation in Tottenham was very easy.



60%

Indicated it was either very difficult or somewhat difficult to find suitable rental accommodation in Tottenham Hale

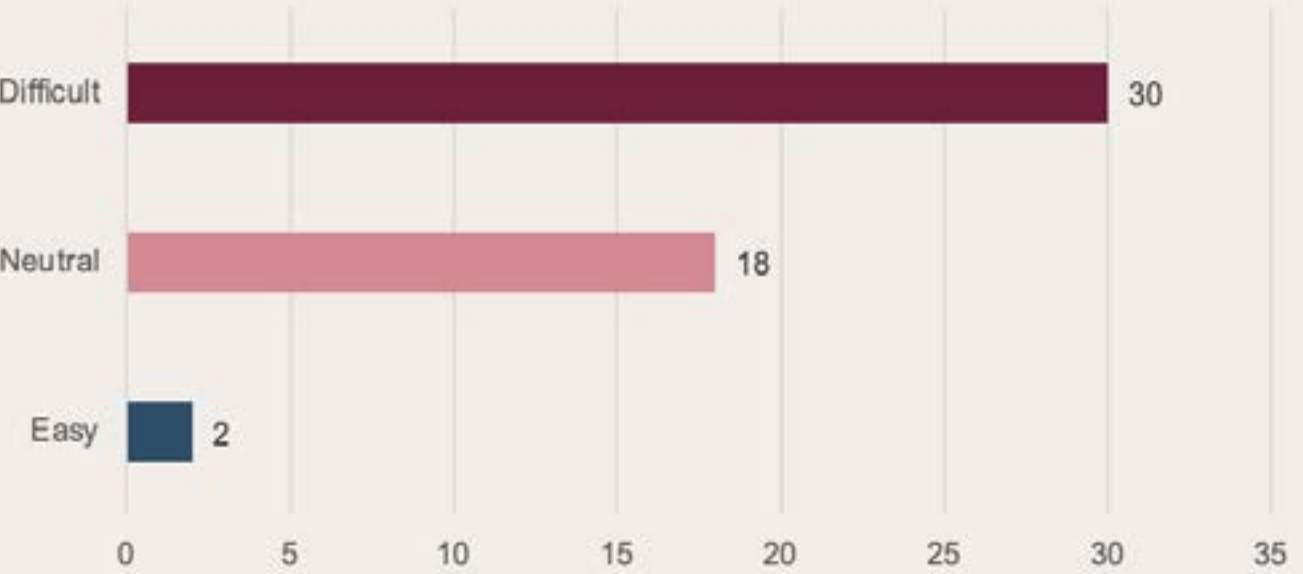


67%

Used negative descriptors for Tottenham Hale's current housing market

'Expensive'	'Pricey'	'Limited'
	'Increasing'	'Changing'
'Unaffordable'	'Dense'	'Hard'
	'Poor quality'	'Shortage'
'Busy'	'Full'	'Prices'
'Competitive'	'Demand'	'Nice'
		'Alright'
'Difficult'	'Crowded'	'No beds'
		'Better'

HOW EASY OR DIFFICULT DO YOU THINK IT IS TO FIND SUITABLE RENTAL ACCOMMODATION IN TOTTENHAM? (BY NUMBER OF RESPONDENTS)



What We Heard



60%

Indicated it was either very difficult or somewhat difficult to find suitable rental accommodation in Tottenham



67%

Used negative descriptors for Tottenham's current housing market



64%

Of total survey respondents Described the Tottenham's housing market as 'Expensive'



54%

Of single-person households that privately rent indicated it is difficult to find suitable rental accommodation

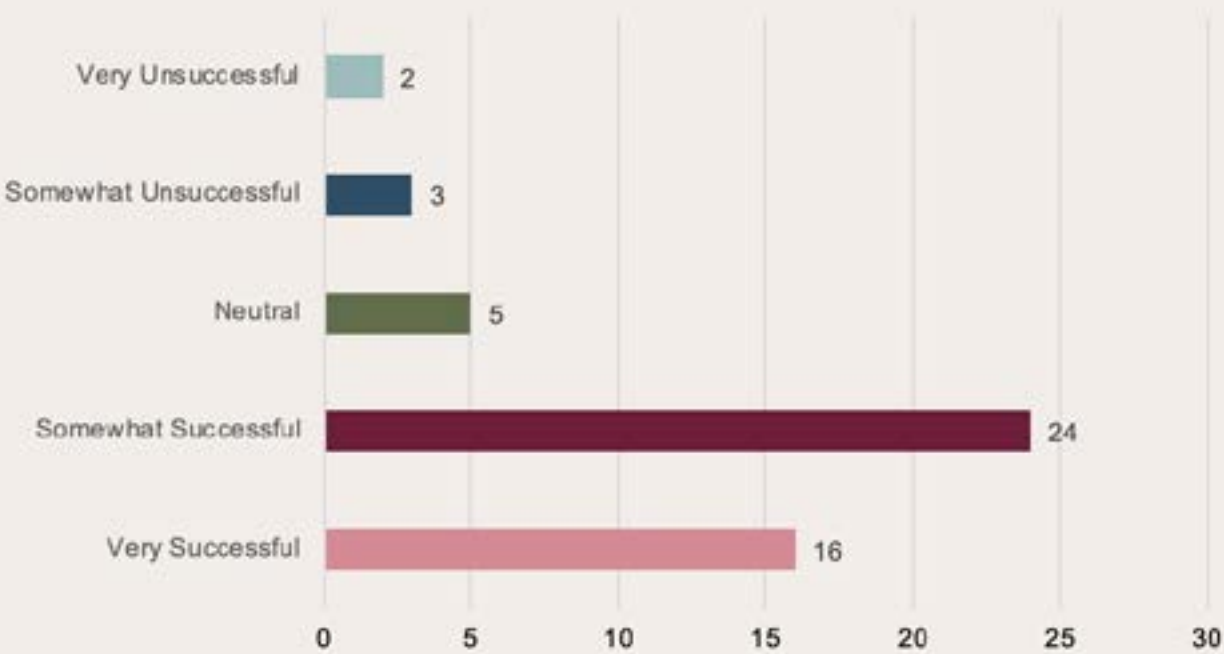
Future Tottenham Hale

4.15 A shared living development was then explained to respondents, including its shared amenities, communal social spaces, flexible rental terms and all-inclusive pricing. Respondents were subsequently asked whether they believed this form of accommodation would be successful in Tottenham.

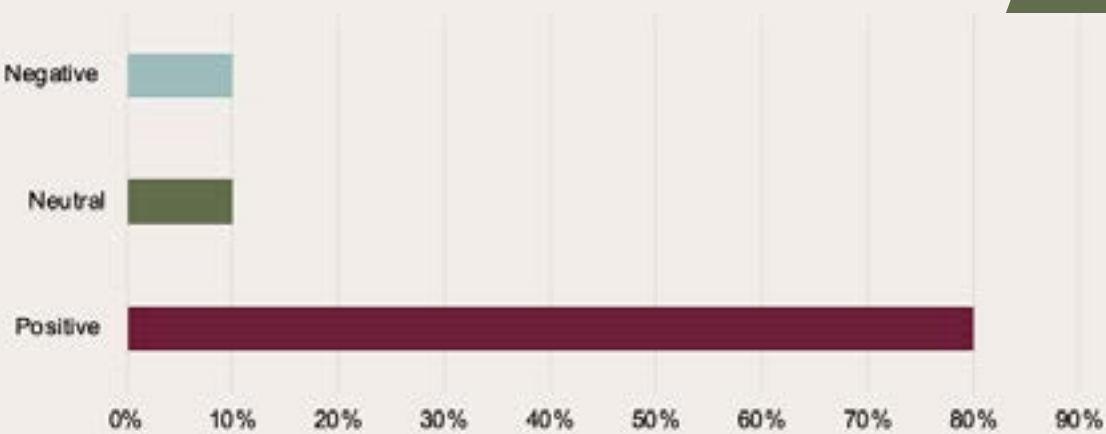
4.16 A total of 80% of respondents considered the concept to be either very successful (32%) or somewhat successful (48%). A further 10% held a neutral view, whilst only 10% considered the concept to be unsuccessful. These findings suggest a strong level of support for shared living as a housing model within Tottenham and indicate that respondents recognise a potential role for this type of accommodation in meeting local housing needs.

4.17 Support for the concept was expressed by people from a wide range of backgrounds, including residents, workers and visitors of Tottenham, as well as people across different age groups and living situations. Among Tottenham residents specifically, 13 of the 22 respondents considered the shared living concept to be either very successful or somewhat successful.

HOW SUCCESSFUL WOULD THE SHARED LIVING MODEL BE IN TOTTENHAM? (BY NUMBER OF RESPONDENTS)



HOW SUCCESSFUL WOULD THE SHARED LIVING MODEL BE IN TOTTENHAM? (BY PERCENTAGE)



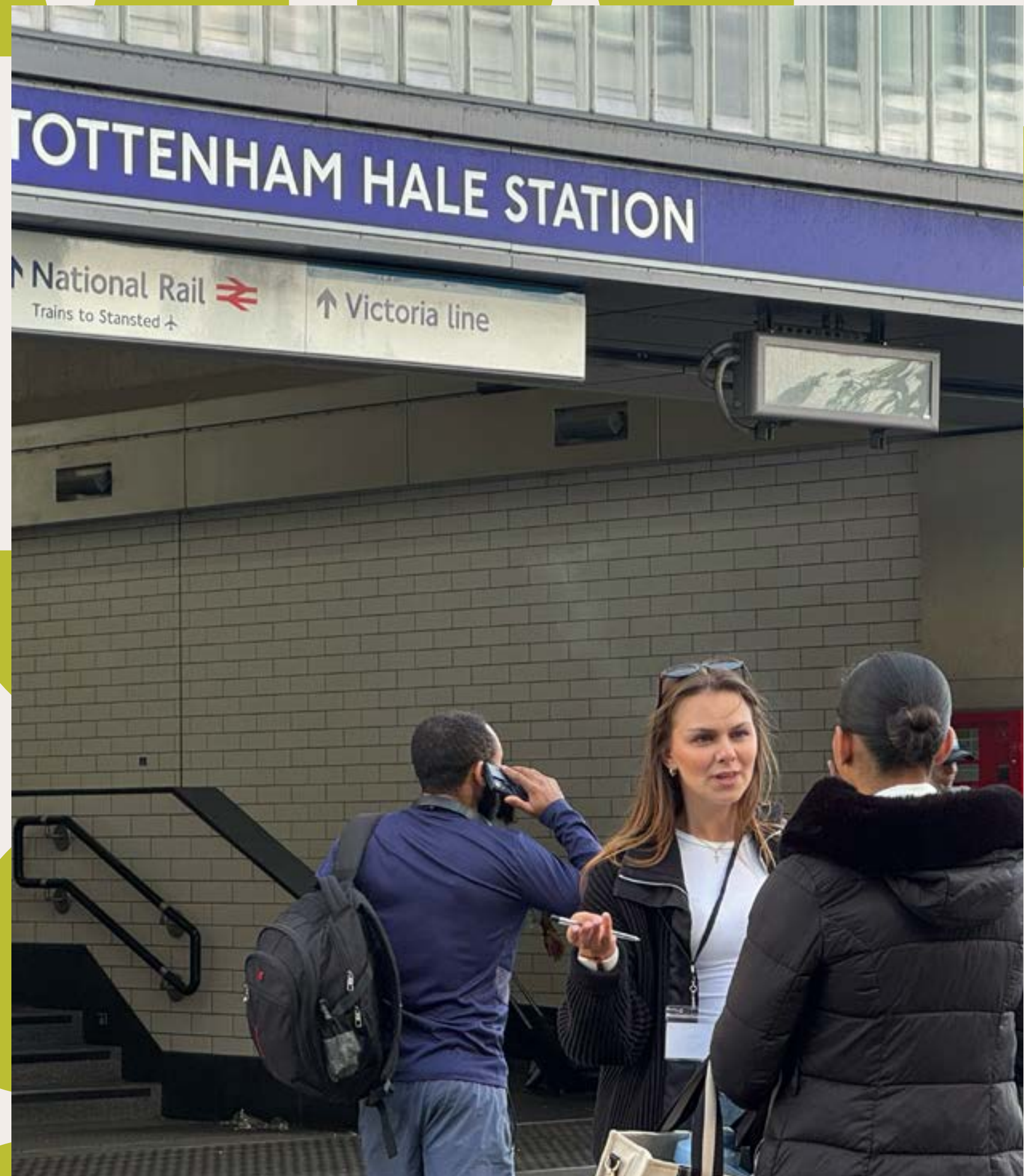
Conclusions From Engagement

4.18 The results of the engagement suggests that housing affordability and access to suitable accommodation are concerns in Tottenham Hale. Respondents described the local rental market as “expensive” and “difficult to access”, with many younger residents living with family members or sharing accommodation with roommates rather than occupying their own accommodation.

4.19 Against this backdrop, the findings indicate strong support for purpose-built shared living accommodation. Four-fifths (80%) of respondents considered this form of housing likely to be successful in Tottenham, suggesting that shared living is viewed as a potentially valuable addition to the local housing offer.

4.20 The engagement results demonstrate clear alignment between identified housing pressures, strong local support for the shared living model, and broader demand for complementary uses.

4.21 Overall, the findings suggest that a mixed-use development combining Shared Living accommodation would contribute positively to local housing challenges whilst supporting the ongoing regeneration of Tottenham Hale.



The Case for Shared living

The Case

5.1 National housing trends indicate a sustained increase in single-person households, which now account for over 30% of all households across the UK. This shift has driven growing demand for housing which respond to smaller household sizes and flexible living arrangements. Within this context, shared living has emerged as a housing typology capable of supporting choice and diversity within the housing market.

5.2 This trend is particularly pronounced in London, where demand for housing suited to single-person households remains strong. The Co-Living Report by Harris Associates (2024) identifies the average shared living resident as 28 years old, with more than a quarter aged 35 or older, indicating demand from economically active residents at both early and mid-life stages.

5.3 Wider market evidence reinforces the scale of this demand. The British Property Federation identifies a significant gap between demand for shared living units and delivery of shared living developments. Meanwhile, CBRE estimates a potential demand pool of at least 515,000 London residents. Within this context, well-connected boroughs with large working-age populations, such as LB Haringey, are well positioned to accommodate this form of housing.

5.4 This section therefore examines local demand within LB Haringey and Tottenham Hale Ward, and assesses whether the proposed development would contribute positively to housing choice and community balance, without resulting in an over-concentration of single-occupancy accommodation.

PERCENTAGE OF POPULATION BY AGE GROUP



Local Demographical Alignment

5.5 LB Haringey's demographic profile supports the provision of housing suited to smaller households. One-person households comprise 30.7% of all households in the borough, representing a substantial component of local housing demand. This is slightly higher than both the London (29.3%) and National (30.1%) averages.

5.6 Household composition in Tottenham Hale Ward reflects a relatively low proportion of one person households, which account for 26.1% of all households. This is below the averages for LB Haringey (30.7%), London (29.3%) and England (30.1%). As such, the existing household profile is characterised by a balanced distribution across household sizes rather than a predominance of smaller households. In this context, the delivery of purpose built shared living would broaden the range of housing options available to smaller households without resulting in an overconcentration of accommodation targeted towards this demographic.

5.7 These characteristics should be considered alongside the borough's age profile. 43.1% of residents in LB Haringey are aged between 25 and 49, aligning with the Tottenham Hale Ward profile where 41.7% of the population is aged between 25 and 49. This age demographic is typically associated with higher residential mobility and a greater propensity to rent or seek flexible tenure arrangements, aligning

with the attributes which make shared living an attractive rental option.

5.8 At 52% of the borough's population, LB Haringey exhibits a relatively high concentration of people who have never married and never registered a civil partnership. This is 6% higher than the London average, and 14% higher than the national average.

5.9 Taken together, LB Haringey's substantial population aged 25 to 49 and high proportion of never married residents, together with Tottenham Hale Ward's relatively low proportion of one person households, demonstrate a demographic profile that is well aligned with the shared living model. Coupled with the Site's highly accessible location (PTAL 5), the proposed development would represent a proportionate and locally responsive addition to the borough's housing offer. It would broaden housing choice for smaller households within an area where this form of accommodation is currently limited, without resulting in an overconcentration of purpose built shared living or housing targeted towards this demographic.

Private Rented Sector Pressures

5.10 Single-person households access housing through a range of tenures. However, for many early and mid-career residents, the Private Rented Sector (PRS) remains the most accessible option due to affordability constraints associated with home ownership and the limited availability of smaller, self-contained homes (assessed further in this document or a further planning document: 'Affordable Housing Statement'). In LB Haringey, privately rented dwellings account for 35.6% of households, exceeding both the London and England figures. In Tottenham Hale Ward, this decreases slightly to 34.7%, indicating

a relative gap in the private rental-oriented local market. As rental costs rise and smaller homes remain limited in supply, choice within the PRS becomes increasingly constrained for single person households, particularly where professionally managed purpose-built accommodation is limited.

5.11 Single-person households are significantly less likely to access home ownership, increasing reliance on rental tenures. This structural shift has intensified over time: private renting in London increased by approximately 61% between 2003/04 and 2023/24, while owner occupation declined by 28% (English Housing Survey). The rental sector has therefore become the primary mechanism through which economically active and mobile residents access housing.

5.12 As reliance on the rental sector has increased, the composition of the borough's housing stock has become increasingly important. Converted or shared dwellings comprise 22.8% of homes in LB Haringey, more than double the London average of

11.1%, while purpose built flats account for 35.4% of stock, below the London average of 40.3%. This suggests that a comparatively greater proportion of demand for smaller and rented homes is currently accommodated through the adaptation of existing housing rather than purpose built accommodation. Purpose built shared living provides an opportunity to diversify the borough's rental offer by delivering accommodation specifically designed for single person occupation, reducing reliance on converted housing stock.

5.13 To absorb demand, existing housing stock is frequently adapted for shared occupation, most commonly through Houses in Multiple Occupation (HMOs). HMOs typically involve the subdivision of larger homes, enabling unrelated individuals to rent private rooms while sharing communal facilities. Licensing frameworks across London reflect both the scale of this tenure and the need to manage its impacts.

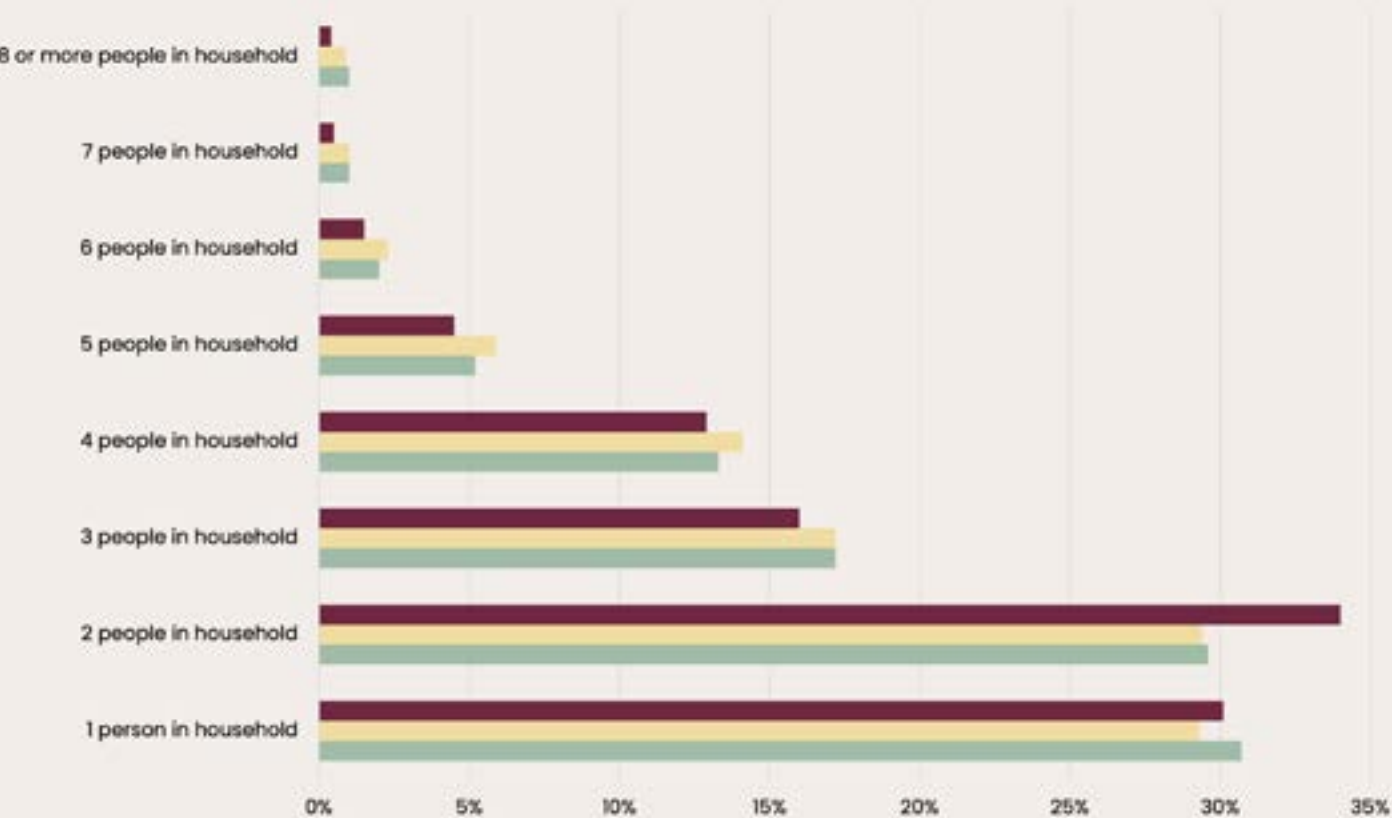
5.14 While HMOs provide an important source of accommodation, their expansion can contribute to the loss of family-sized housing and place

downward pressure on dwelling quality. Subdivision to maximise occupancy may result in constrained living environments, particularly where properties were not originally designed for higher-density use. Additionally, with 39.7% of households having three or more people in LB Haringey, preserving family-sized housing for larger households is particularly important locally.

5.15 Evidence from the English Housing Survey indicates that 21% of privately rented homes are classified as non-decent, compared with 14% of owner-occupied homes, highlighting persistent quality challenges within the sector. As a result, many renters accept compromises in space and amenity in exchange for affordability and access to well-connected locations.

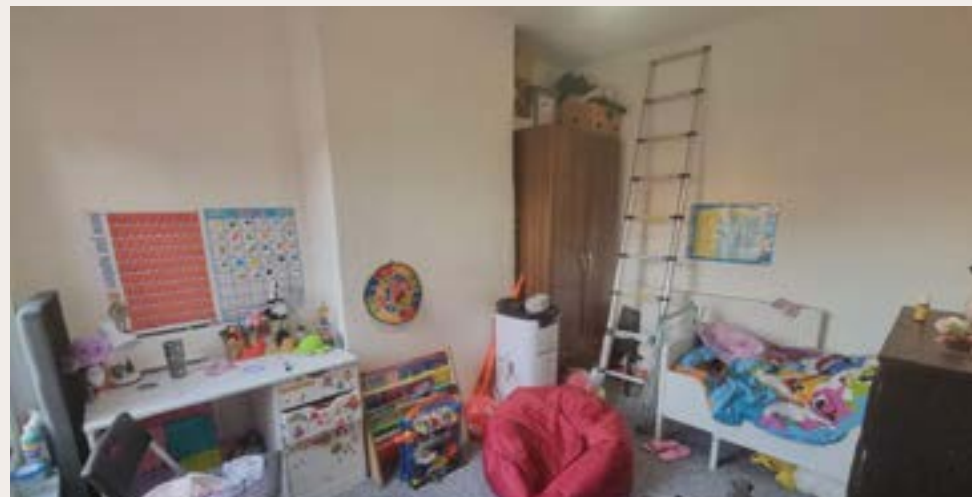
5.16 Within this context, purpose-built shared living has the potential to reduce reliance on subdivisions of traditional housing while supporting a more efficient use of the borough's housing stock.

PERCENTAGE OF HOUSEHOLDS BY SIZE



I Rental Particulars

5.17 Across the Tottenham Hale area, a review of current listings on SpareRoom and Rightmove identified a range of options for single occupants, including one-bedroom flats, studios, and rooms within shared houses. Rental levels are particularly high for one-bed and studio rentals, whereas rooms for rent in existing shares are more accessible but suffer severely in terms of quality.



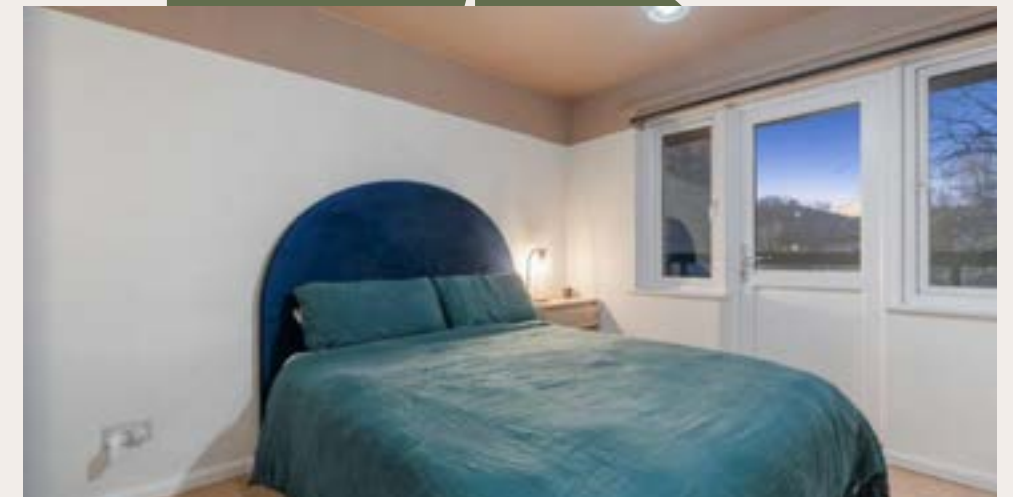
One-Bed Flat N15

£1,470 PCM (Bills not included)



One-Bed Flat N15

£1,500 PCM (Bills not included)



One-Bed Flat N15

£1,700 PCM (Bills not included)



Studio Flat N17

£2,220 PCM (Wifi included)



Room in 2-Bed Flatshare N17

£1,000 PCM (Bills not included)



Room in 2-Bed Flatshare N17

£1,520 PCM (Bills not included)



22.8%

Percentage of people living in Shared or Converted Housing in LB Haringey



39.7%

Percentage of household with three or more people

Freeing Up Traditional Housing Stock

5.18 Family-sized housing (3 or more bedrooms) forms 41.6% of Tottenham Hale's residential profile. At the same time, single-person households represent a significant proportion of local households and are expected to increase further as new development is delivered across the area. In the absence of sufficient purpose-built accommodation for this demographic,

demand is frequently met through studios, one-bedroom homes or shared occupation of larger family properties, placing additional pressure on housing stock that could otherwise accommodate families.

5.19 Purpose-built shared living provides a targeted response to this imbalance by accommodating smaller households within housing specifically designed for higher-density occupation. By absorbing demand that might otherwise be met through the subdivision of family homes or reliance on HMOs, shared living can support a more efficient use of the borough's housing stock while helping to improve the overall balance of the local housing market.

Mixed and Balanced Community

5.20 There is no evidence of an over-concentration of purpose-built single-occupancy accommodation, nor single-occupancy housing in a wider sense (i.e., including PBSA and other studio/single occupancy accommodation) within Tottenham Hale or the wider LB Haringey area. Nevertheless, single-person households comprise a meaningful proportion (26.1%) of the Tottenham Hale Ward's demographic profile.

5.21 The London Plan (2021) highlights the need for mixed and balanced communities, where housing supports a range of people and avoids concentrating one type of household in any particular area. Shared living is recognised under Policy H16 as part of this mix, designed for groups of young professionals and mobile residents. Policy H16 states that shared living schemes should “*contribute towards mixed and inclusive neighbourhoods*”,

meaning they should sit alongside other housing options rather than stand apart.

5.22 LB Haringey's housing profile reflects a varied residential environment. Census data indicates a balanced distribution across household sizes, with a clear majority of two-person and larger households alongside a substantial proportion of smaller households. Importantly, the presence of single-person households does not currently correspond with a significant supply of purpose-built single-occupancy accommodation. This existing diversity provides a stable foundation for the introduction of additional housing typologies without materially altering neighbourhood composition.

5.23 Research indicates that residents of shared living developments are typically economically active and professionally mobile. Harris Associates identifies

an average resident age of 28, with a significant proportion aged 35 and over. These characteristics align with LB Haringey's strong working-age profile and established rental market. The Site's highly accessible location (PTAL 5) further supports the appropriateness of shared living development in this location.

5.24 Purpose-built shared living is structured to support interaction through communal spaces and professional management, creating opportunities for resident engagement that are less readily facilitated within traditional private rentals or informal house shares. In this respect, shared living represents a managed and purpose-built response to single-person household demand, rather than an intensification of informal shared housing. As such, shared living does not operate in isolation but instead contributes to neighbourhood vitality by

introducing a resident population that participates in the local economy and community life.

5.25 Tottenham Hale Ward exhibits a comparatively internationally mobile population, with 54.1% of residents not born in the UK and 7% having lived in the UK for under two years. In this context, accommodation models that incorporate shared amenity space and structured management can support social interaction and integration for residents who are new to the borough, reinforcing the London Plan objective of fostering mixed and inclusive neighbourhoods.

5.26 Given the borough’s varied housing stock and the lack of an over-concentration of single occupancy accommodation, the introduction of purpose-built shared living would represent a proportionate and policy-aligned addition to the local housing mix. Delivered alongside existing tenures, shared living has the capacity to support mixed and inclusive neighbourhoods in accordance with London Plan objectives while reinforcing, rather than altering, the established residential character.

HOUSING DELIVERY ACROSS TOTTENHAM HALE

	Total	1 bed	2 bed	3 bed	1-3 bed*	4 bed+	Studio	Co-Live	PBSA
Other recently approved schemes in Tottenham Hale	4,044	1,190	1,396	356	256	37	152	0	657
Ashley House site proposal	470	10	30	20	0	18	0	292	0
Cannon Factory site proposal	218	0	0	0	0	0	0	0	218
Total units*	4,632	1,200	1,426	376	256	55	152	292	875
Total %	100%	25.9%	30.8%	8.1%	5.5%	1.2%	3.3%	6.3%	18.9%

*Exact unit size breakdown unknown.
**Housing target ratios applied to co-living (1.8:1) and PBSA (2.5:1) units.

CENSUS 2011: ‘HOUSEHOLD SPACES’ BY NUMBER OF BEDROOMS TH WARD

Number of bedrooms	Total	%
No bedrooms	16	0.3%
1 bedroom	1,224	22.7%
2 bedroom	2,074	38.5%
3 bedroom	1,690	31.4%
4 bedroom	305	5.7%
5 or more bedroom	75	1.4%
Total %	5,384	100%

*Baseline housing mix before majority of development in Tottenham Hale began.

Emerging Supply

5.27 Since 2015, Tottenham Hale has been designated by the Mayor of London as a Housing Zone. As part of this designation, the area received funding for enabling infrastructure to support the delivery of up to 5,000 new homes (including 859 private homes and 288 affordable homes) and 4,000 jobs. Tottenham Hale is an established residential and mixed-use area characterised by strong public transport accessibility, proximity to major employment centres, and a well-established local cultural offer.

5.28 These characteristics align closely with the preferences typically associated with shared living residents, who tend to prioritise connectivity, flexibility, and access to employment, services and leisure amenities. Census data indicates that the surrounding area supports a broad mix of household types, housing tenures and residential typologies, reflecting a diverse and balanced residential environment. Furthermore, the ongoing delivery of new homes as part of Tottenham Hale's regeneration is occurring through a range of housing products and tenures, demonstrating that the proposed shared living scheme would complement, rather than dominate, the area's evolving residential character.

5.29 Three residential developments were identified within the planning pipeline in a tight 0.25 mile radius of the Site. These comprise Berol Quarter, Tottenham Hale Station at Heart of Hale and Station Square West at Heart of Hale, which together will deliver 694 Build to Rent homes, including 35% affordable

housing at Berol Quarter. Across the pipeline, 340 homes comprise studios or one bedroom apartments, 286 comprise two bedroom homes and 67 comprise family sized homes with three or more bedrooms. None of these developments include purpose built shared living accommodation.

Planning Insight

25-27 Clarendon Road

25 to 27 Clarendon Road (N8 0DD) (HGY/2024/2279) received planning permission in January 2025 for the demolition and redevelopment of the site to provide a purpose-built shared living development comprising 222 shared living studios, together with 232 sqm of affordable workspace, public realm improvements and associated communal amenity space. Located approximately 3.5km west of the Site and outside the 0.25-mile pipeline search area, the proposal represents Haringey's first consented purpose-built shared living development and reflects growing confidence in shared living as an emerging residential typology within well connected locations across the borough



5.30 Across Haringey more widely, a number of residential and mixed use schemes are progressing through the planning pipeline. One such proposal at 25 to 27 Clarendon Road, Wood Green was granted planning permission in January 2025 and will deliver 222 shared living studios, alongside affordable workspace and public realm improvements. The scheme represents Haringey's first purpose built shared living development.

5.31 The introduction of shared living within this setting would therefore occur alongside a broad range of conventional housing tenures and formats. The existing mix of family housing, flats and rental accommodation indicates that Tottenham Hale functions as a diverse residential environment capable of accommodating additional housing typologies without materially altering neighbourhood composition. Furthermore, the proposed development will itself deliver a genuinely mixed use and mixed tenure scheme, comprising 530 shared living studios alongside 77 affordable social rented homes, ground floor commercial and community uses, and new public realm. This reinforces the role of the development as part of Tottenham Hale's wider regeneration rather than as a standalone shared living proposal.

5.32 The absence of identified pipeline shared living provision within the 0.25 mile study area demonstrates that there is no existing concentration of purpose built shared living accommodation surrounding the Site. The proposed development would therefore introduce a distinct housing typology that complements the wider residential pipeline rather than contributing to an overconcentration of comparable accommodation.

5.33 Taken together, the Site's accessibility, the varied surrounding housing stock, and the ongoing delivery of new homes demonstrate that purpose built shared living is well suited to the local context. The evidence presented confirms that the proposed development would align with the borough's demographic and housing characteristics, broaden housing choice and contribute to a diverse mix of housing tenures without resulting in an overconcentration of shared living accommodation. Having established the strategic and local case for shared living, the following section assesses the affordability of the proposed accommodation relative to alternative tenures to determine its accessibility for the target resident profile.

PIPELINE DEVELOPMENTS IN 0.25 MILE RADIUS FROM SITE

Development Site	Tenure Type	Total # of Homes	# of Studios/ 1 Bedrooms	# of 2 Bedrooms	# of 3+ Bedrooms	Status
Berol Quarter	100% BTR (35% affordable)	210	68	114	28	Under Construction
Tottenham Hale Station – Heart of Hale	100% BTR	376	217	131	27	Nearing Completion
Station Square West– Heart of Hale	100% BTR	108	55	41	12	Nearing Completion
TOTAL		694	340	286	67	

Affordability Assessment

5.34 While shared living schemes are not subject to affordable housing requirements, affordability remains an important consideration for residents facing limited options within the private rented sector. Unlike traditional housing tenures, shared living incorporates utilities, amenities, and management services within a single monthly payment, providing greater cost certainty and a useful basis for assessing overall value.

Product Affordability

5.35 Shared living developments are required by London Plan Policy H16 to provide communal amenities that support resident wellbeing, including facilities such as co-working space, fitness areas, and shared lounges. These amenities form part of the all-inclusive pricing model and contribute to the overall value proposition of shared living accommodation. The London Plan Guidance provides benchmarks for communal amenity provision, against which the proposed scheme requires approximately 2,120 sqm of communal amenity space. The proposals exceed this benchmark, delivering approximately 2,400 sqm of internal and external communal amenity space

What's included?

EXAMPLE OFFERING FROM EXISTING Shared living DEVELOPMENT

A shared living development situated in the Wembley Park area of North London offers 300 fully furnished studio shared living apartments available for flexible stays ranging from two nights to a year. Residents have access to a range of amenities, including multiple co-working spaces, a state-of-the-art gym, wellness studio, Peloton spin studio, and a rooftop terrace. The location also enables residents to benefit from a wide range of shops while maintaining excellent connectivity to the rest of the city.

- 

WI-FI
- 

ON-SITE TEAM 24/7
- 

CO-WORKING SPACES
- 

GYM
- 

WELLNESS STUDIO
- 

COMMUNAL KITCHEN
- 

ROOFTOP TERRACE
- 

LAUNDRY FACILITIES
- 

MEETING ROOMS
- 

MEDIA ROOM
- 

CLEANING SERVICE

Housing Cost Comparator

5.36 The housing market in Tottenham Hale is characterised by relatively high density urban living and significant affordability pressures. Although the area contains a substantial supply of flats and rented accommodation, rental and house prices continue to constrain access to self contained housing, particularly for younger and single person households who do not qualify for social rented housing. The rental values presented within the following analysis provide an indicative snapshot of market pricing at a single point in time and are intended to illustrate the relative cost of different housing products rather than a comprehensive assessment of the local rental market.

5.37 Using LB Haringey's median income (£38,605 per annum) as a benchmark, the affordability of shared living was assessed against HMOs, shared flats, private rented self-contained accommodation, and entry-level home ownership.

5.38 The assessment identified a clear trade off between affordability, quality and accessibility across the local housing market. HMOs represent the lowest cost option but often involve

compromised living standards, while shared flats improve affordability through cost sharing but are dependent on household formation. Conversely, self contained private rented accommodation and home ownership are associated with substantially higher housing costs, with ownership further constrained by significant upfront deposit requirements. This is reflected in local tenure patterns, with only 28.6% of households in Tottenham Hale owning their home.

5.39 At approximately £1,900 per month inclusive of utilities, council tax, workspace access, fitness facilities and communal amenities, shared living occupies a middle position between lower cost shared housing and higher cost self contained accommodation. By consolidating essential housing costs into a single monthly payment, the model provides greater cost certainty while expanding access to professionally managed accommodation in a highly accessible location. As such, shared living represents a financially accessible addition to the local housing offer, broadening housing choice for intermediate income households who may otherwise struggle to access self contained accommodation.

COST COMPARATOR

Household Type	Average Rent/Mortgage	Associated Costs**	Total Estimated Costs
Shared living Scheme (Class E)	£1,900/Month*	Rent	£1,900/Month
1 Individual Apartment Rent (Studio or One Bedroom) (Class C3)	£2,334.33/Month	Rent, Utilities (electricity, water, gas, internet, Council tax), gym	£2,646.33/Month
HMO (Class C4)	£1,031.12/Month	Rent, Utilities (electricity, water, gas, internet, Council tax), gym	£1,343.12/Month
Ownership (Studio or One Bedroom) (Mortgage) (Class C3)	£1,940/Month	Mortgage, Utilities (electricity, water, gas, internet, Council tax), gym	£2,252/Month + Average deposit of £39,950
2 Individuals renting a 2-bedroom apartment (Class C3)	£1,464/Person/Month	Rent, Utilities (electricity, water, gas, internet, Council tax), gym	£1,776/Person/Month

*THIS FIGURE IS AN ESTIMATION BASED ON EXISTING SHARED LIVING OPERATORS AND PROPOSALS. THE APPLICANT RESERVES THE RIGHT TO ADJUST RENT LEVEL AND AMENITY OFFER.

** THE ADDITIONAL SUM OF THE EXTERNALISED LIVING COSTS ADDED TO ALL HOUSEHOLD TYPES EXCEPT FOR SHARED LIVING COMES OUT TO £312/MONTH

Externalised Living Costs



Utilities
£160/Month



Council Tax
£72/Month***



Gym Membership
£80/Month



Social Activities
£150/Month



Co-Working
£250/Month

*** COUNCIL TAX IS AN AVERAGE FOR LB HARINGEY BAND B WITH A 25% DISCOUNT (SINGLE PERSON HOUSEHOLD DISCOUNT) APPLIED.

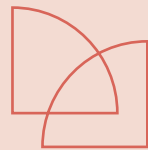
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Conclusions



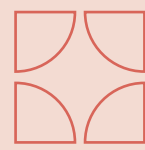
Demographical Alignment

6.1 This Shared Living Needs Assessment has examined the demographic profile of LB Haringey, with specific analysis of Tottenham Hale Ward, to determine whether the proposed delivery of purpose-built shared living at Ashley Park would meet a local need. The evidence demonstrates that both the borough and the surrounding ward support a substantial working-age population, with high concentrations of residents aged 25–49, meaningful presence of single-person households, as well as a significant renter population. Tottenham Hale Ward in particular exhibits a comparatively mobile and internationally diverse resident base alongside an established prevalence of higher-density housing and shared housing typologies. These characteristics align closely with the resident profile typically associated with shared living developments, confirming strong compatibility between the proposed typology and the existing population structure surrounding the Site.



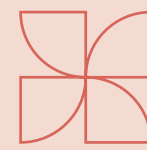
Housing Market and Structural Demand

6.2 The Assessment has also considered the functioning of the local housing market. LB Haringey's housing stock is characterised by higher-density housing forms, including purpose-built flats and shared housing, while the private rented sector plays a significant role in accommodating younger and more mobile households. While demand for smaller and flexible living arrangements is evident, much of this demand is currently absorbed through informal shared housing and converted rental stock. Further, 60% of survey respondents stated that it is difficult to find suitable rental accommodation locally, highlighting ongoing housing pressures in Tottenham Hale. Alongside this, 80% of respondents agreed that shared living would be successful locally. In this context, shared living represents a professionally managed housing product capable of responding to identified demand while contributing to a broader diversification of the borough's housing offer.



Mixed and Balanced Community

6.3 A review of planning activity and pipeline supply confirms that large-scale shared living provision within LB Haringey remains limited. While 25–27 Clarendon Road will deliver the borough's first major purpose-built shared living scheme, there is currently no established concentration of shared living accommodation within Tottenham Hale or the wider borough. The Site occupies a highly accessible urban location where residential intensification is supported by planning policy. Importantly, community engagement undertaken as part of this Assessment demonstrated clear local confidence in the suitability of shared living within Tottenham Hale.



Policy Compliance and Strategic Fit

6.4 The proposed development has been assessed against national, regional, and local planning policy, including London Plan Policy H16, all of which recognise purpose-built shared living as an emerging residential typology capable of contributing toward housing delivery in accessible urban locations. The Site's strong public transport accessibility (PTAL 5), proximity to Tottenham Hale Station, and access to employment, services, and wider North London destinations align closely with the locational expectations of the policy framework. Collectively, the evidence demonstrates that the proposed shared living development responds to identifiable demographic and market demand while supporting broader objectives relating to housing choice, tenure diversification, and mixed and balanced communities.



Overall Conclusion

6.5 The Assessment concludes that the delivery of purpose-built shared living at Ashly House is appropriate in both strategic and local terms. The proposal aligns with the demographic and housing characteristics of both LB Haringey and Tottenham Hale Ward, responds to identifiable pressures within the local rental market, and would be delivered within an established and balanced residential environment without contributing toward an over-concentration of shared living accommodation. As such, the development represents a proportionate and policy-aligned addition to Tottenham Hale's evolving residential market.

re:shape



For more information, please get in touch or visit our website.

Office@andlondon.net

+44 (0) 20 8469 3079

www.andlondon.net

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