

Our ref: Q240048
Your ref: HGY/2024/1008
Email: sean.bashforth@quod.com
Date: 22 July 2024



Head of Development Management and Planning Enforcement
Placemaking and Housing
Haringey Council
Alexandra House
10 Station Road, Wood Green, N22 7TR

For the attention of Mr Sam Uff

Dear Sir

RE: HGY/2024/1008; Minor Material Amendment application under Section 73 of the Town and Country Planning Act for the variation to Condition B9 (Major Non-association Football Events) of the hybrid planning permission HGY/2023/2137 (as amended) for amendments to allow up to 30 major non-association football events including music concerts; and other associated changes

We refer to the above application and respond to matters relating to economic benefits. We respond to other matters separately.

This particular letter addresses the following comment:

“Economic benefits- we also still think the case for economic benefits could be better made with more specific data to show specific benefits as this is crucial to the planning balance.”

1 The benefits of non-football events

Demand for live entertainment is growing. Recent economic analysis of the music industry found that the number of 'music tourists' in London (i.e. people travelling to attend music events from outside the local area) increased from 2.3 million in 2016 to 4.1 million in 2019.¹ The sector was heavily impacted by Covid restrictions, but the latest research shows signs of recovery. As the latest Government sponsored Economic Report explains²:

¹ <https://www.ukmusic.org/research-reports/report-archive/music-by-numbers-2020/>

² <https://www.ukmusic.org/wp-content/uploads/2024/06/This-Is-Music-2023-Economic-Report.pdf>



“Live Performance

The post-COVID-19 recovery of the live sector continued during the first half of 2023. While the live sector returned during 2022, the first quarter of 2022 was relatively quiet, and there was still some lingering COVID-19-related disruption. Consequently, the first half of 2023 was significantly better by comparison. 2023 continues to be a strong year for live music with stadium shows by Beyonce, Blur, and Burna Boy, the first African artist to headline a stadium concert in the UK.”

A press release from the Mayor of London citing a Visit London poll on 20 June 2024 explained how the recent Taylor Swift tour generated £300m million for the Capital’s economy and confirmed its status as a World leader for music³. It demonstrates the importance of major artists in raising the profile of London and the areas around its venues. The Visit London poll found that:

- 54 per cent of people said they would consider travelling to London for a music event in the past year – higher than New York, LA, Paris and other UK cities.
- 76 per cent would extend their trip after visiting a music event here, 77 per cent agree London offers a variety of music events and 72 per cent think the capital attracts the best international artists.

Given economic benefits of this nature it is not surprising that the additional MNFEs application has been strongly supported at a strategic level by the Mayor of London. The consultation response from the Mayor Deputy Chief of Staff, dated 28 June 2028, stated as follows:

“In an increasingly competitive world, it is imperative for London’s cultural, music and sporting economy that the city maximises its assets. This makes the Tottenham Hotspur Stadium strategically important they must have the flexibility to perform their role effectively. Additional dates will allow London to attract more global artists, enhancing the city’s cultural offerings and ensuring that London remains open for business.”

2 Local Benefits of MNFEs

Economic inequalities and workforce skills are long-term challenges for this part of the Borough. This is reflected in indicators such as relatively high levels of unemployment and permanently sick/disabled residents.

³ <https://www.london.gov.uk/taylor-swifts-record-breaking-eras-tour-generate-ps300m-capitals-economy-london-confirms-status>



The Tottenham area (as defined in the AAP) makes up about one-third of the total population of Haringey. The population of Tottenham is generally younger than the Borough as a whole. It is one of the most ethnically diverse areas in London. Tottenham is among the most deprived areas in England and has for many years been a focus of regeneration initiatives. Northumberland Park Ward, where the Stadium is located, is in the top 10% most deprived in England in the Indices of Multiple Deprivation.

The report by Ernst & Young (EY) of December 2023 (attached) set out the very significant benefits which the Club already brings to the local area. These are expected to grow to £549m Gross Value Added (GVA) and 3,100 jobs in the 2026/7 season for LB Haringey alone. The following extracts show how this will also benefit the tri-boroughs⁴ and London more broadly:

As page 14 of the EY report explains, in the 2021/22 season there were over 1.6 million visitors to the stadium, 55,000 international fan visitors and £52m spent by overseas and non-local visitors on matchdays and event days. Additional MNFEs will increase these numbers significantly.

London Borough of Haringey	Tri-borough area	Greater London
£549m GVA in 2026/27	£585m GVA in 2026/27	£748m GVA in 2026/27
3,100 jobs in 2026/27	4,300 jobs in 2026/27	5,700 jobs in 2026/27

The additional events will provide much needed economic investment in Tottenham, consistent with planning policy. This is clear from the supporting text to the NT7 allocation in the Tottenham Area Action Plan which states as follows:

“5.135 The London Borough of Haringey is proud of its long association with Tottenham Hotspur Football Club. It is a major employer in the Borough and important for Haringey’s economic success. The Council will, where appropriate, continue to work with the Football Club to ensure appropriate nearby developments capitalise on the opportunities presented by the existing and proposed stadium, which enhance the investment in the stadium and surrounding areas and respect the operational needs of the Football Club. Leisure uses around the stadium will encourage a wider audience on non-match days to ensure a viable and vibrant location throughout the year, creating an attractive environment for residents and non-residents to visit.”

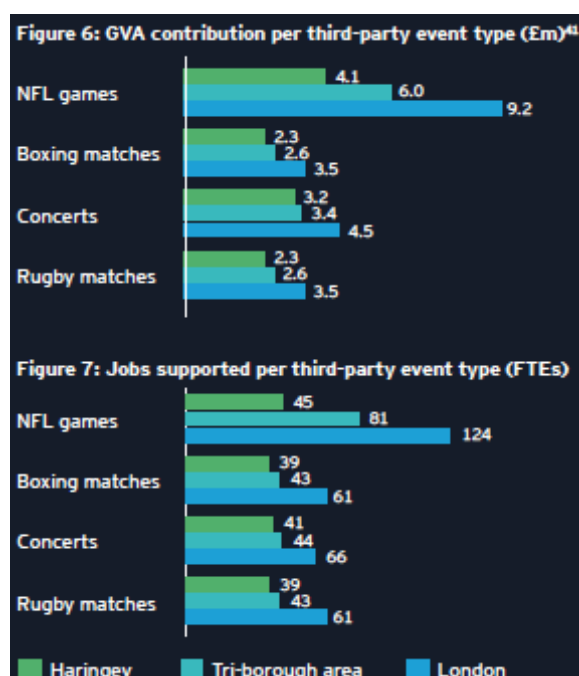
[Our Emphasis]

⁴ London Boroughs of Haringey, Enfield and Waltham Forest



3 The Benefits of additional MNFEs

Third-party events drive significant economic benefits to the local area surrounding the stadium, enabling greater contributions to the local economy through money spent by visitors to the stadium on accommodation, transport, food and drinks. In addition, third-party events drive economic impacts through salaries of stadium employees, hire fees, in-stadium visitor expenditure and also expenditure and jobs outside the stadium. Figures 6 and 7 of the EY report set out the impacts of the different types of MNFEs in the 2021/22 season as follows:



Beyond the economic and job benefits, MNFEs such as music concerts bring a 'halo' effect to the stadium and the surrounding area. They reinforce the status of the stadium as a leisure anchor and destination, with each major event typically bringing over 40,000 people to the local area. The majority of these visitors will be making a special trip to Tottenham in order to attend an event. Many will spend money outside the venue, especially on food and beverage, which will benefit local businesses.

Informed by the actual data from the EY report, the economic and community benefits of additional events were set out in our letter dated 8 July 2024. These weigh significantly in favour of the grant of planning permission and include:



- Each individual event delivering **up to £4.1m GVA for Haringey** (£9.2m for London) and supporting the equivalent of **up to 45 FTE jobs** (124 FTE jobs for London)⁵.
- The potential for the additional 14 events to deliver **up to £42m GVA and up to 574 FTE jobs per year** locally in Haringey¹.
- A **60% increase in footfall locally which directly benefits hospitality, food & beverage and other businesses** which remain open during events. Each event could bring 40,000 visitors, with up to 14 events having the potential to bring half a million visitors to the local area.
- The **indirect benefits of bringing additional wealth to the local area** in terms of local services and suppliers, such as wholesalers, opticians and comparison retailers.

The Club's Foundation and other Club initiatives help to ensure that these benefits are harnessed as effectively as possible locally and respond to challenges locally.

In response to the specific questions about local benefits, we have sought further clarification from EY who have confirmed that of the MNFEs that took place in the 2021/22 season:

- Approximately 60% of the GVA per event (between £1.3m and £2.5m) was spent inside the Stadium and around 40% (between £1m and £1.6m) was spent outside.
- Over 70% of jobs arising from NfL events were created outside of the stadium (33 FTE out of a total of 45); 66% of the concert jobs were outside (27 FTE out of a total of 41) and 56% of boxing and rugby event jobs were created outside of the stadium (22 FTE out of a total of 39).

Jobs inside and outside of the stadium provide significant local employment opportunities. The table below shows existing data for event day employees home location:

	Local (5 mile radius)	Total Count	% employed locally (5 mile radius)
Permanent Employees	235	780	30%
Event Day (Casuals)	995	1,520	65%
Total	1,230	2,300	

⁵ These figures are based on data from actual events in the 2021/22 season and comprise £2.3M & 39 jobs for rugby matches and boxing matches, £3.2M & £41 jobs for concerts and £4.1M & 45 jobs for NfL games



This is expected to continue for additional events, particularly with the various initiatives undertaken by the Club and its Foundation.

GVA within the stadium also benefits the local area through Club expenditure on local supply chains. During the financial year 2023/34, the Club spent £18.2m on goods and services with businesses based in the N17 post code area.

The EY report also explains the various initiatives that the Club delivers to ensure that these benefit local people as much as possible, including the extensive community outreach work of the Tottenham Hotspur Foundation. The Club and its Foundation provides continuous support to a range of community causes throughout the year. For example, the Club supports an ongoing fundraising campaign for local foodbanks, donating essential items each year. Most recently and perhaps slightly ironically, as a consequence of the late cancellation of the Pearl Jam scheduled for Saturday 29 June, food intended for the event was donated by the Club to the Felix Project to distribute locally to those in need locally.

Through its Foundation, the Club continually creates employment opportunities locally including hosting regular Jobs Fairs at Tottenham Hotspur Foundation and one-to-one employment, mentoring and advice services at Percy House. Throughout the school holidays, the Club's Foundation delivers free football and multi-sport activities for young people and families of all ages and abilities. The **Appendix** provides some sample case studies illustrating how the headline GVA and job numbers are actually translating into beneficial impacts at an individual level.

It is therefore clear that the economic and community benefits of additional events weigh significantly in favour of the grant of planning permission.

We trust this is of assistance and will respond to other matters raised by Officers separately.

Yours sincerely

Sean Bashforth
Senior Director



APPENDIX 1

Jeylan Cemal

Jeylan Cemal attended a Jobs Fair at Tottenham Hotspur Stadium in March 2022 whilst looking for work after leaving college. Whilst there she met employment advisers from the Tottenham Hotspur Foundation who gave her support with CV writing and interview technique and encouraged her to apply for a role in the Stadium stewarding team. Ceylan has been in her role at the Stadium for over a year and works nearly every matchday and third party event. Her long-term ambition is to join the Metropolitan Police service and she believes her experience as a steward is ideal preparation for her future career

Harry Sapford

Harry was introduced to the catering team at the Club by the Down's Syndrome Association as he was passionate about becoming a chef and was also a huge Spurs fan. Harry has now been working at the stadium for the past year and is just about to start his Level 2 chef apprenticeship, with the aim of being able to move into his own home and live independently.

Kareem Mavideniz

Kareem was registered with the youth justice service and referred to Tottenham Hotspur Foundation to develop his employability skills. Since then he has been supported with 1-2-1 mentoring and support ahead of jobs. He has since had two jobs at Tottenham Hotspur Stadium – one in the Tottenham Experience from January 2023 – July 2023 and now a permanent role with F1DRIVE which he began in January 2024.

Jonathan Mady

Jonathan's joined the Tottenham Hotspur Foundation's Street Soccer programme during the summer of 2021, having previously been released from a football Club Academy and finding himself homeless. His interest in football was his main motivation in joining the programme. Jonathan's progression throughout his time with Street Soccer has been transformational, from being reserved and withdrawn to showing great leadership and even assisting with delivering football sessions. This year, Jonathan was offered a Traineeship with the Foundation, learning the different roles across all departments in the Foundation as well as continuing with the Street Soccer Academy Programme as a coach.

Aaron Plummer

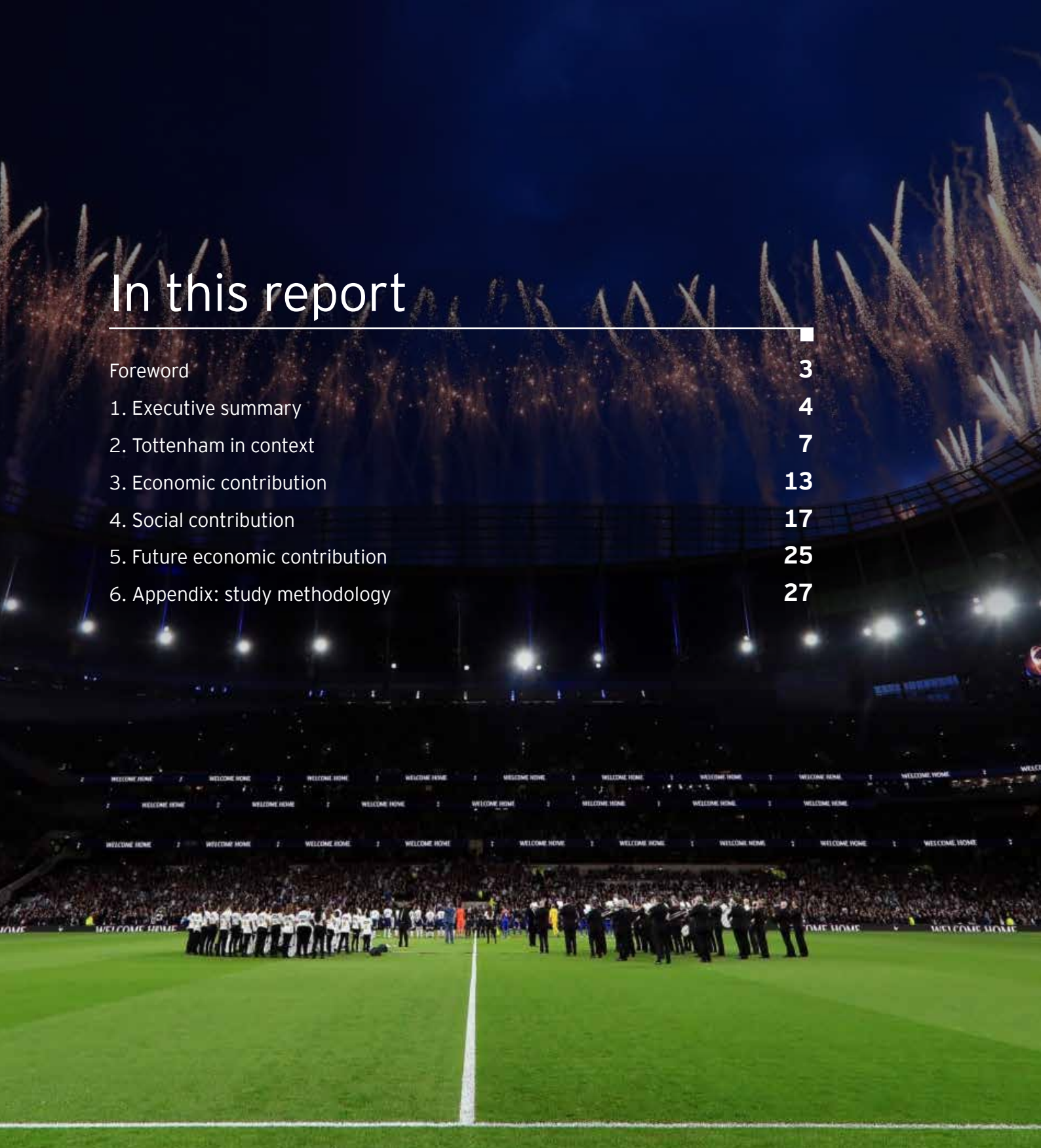
Aaron Plummer, a local resident who has cerebral palsy, got a job with the Club's catering partner, Levy Restaurants, on matchdays after years of rejections elsewhere. When asked about his experience finding work through the Club, Aaron has said: "Every time I handed my CV into places, they wouldn't even contact me or would just say no because they saw my learning disability before they saw me. When I attended one of the Foundation's open days for jobs at the stadium, it was so easy. A week later, I was told I had a job. All these years of wanting a job, I was like 'YES!!!"

Tottenham Hotspur

An analysis of the Club's
socio-economic contribution
to the local area

December 2023





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Foreword



Peter Arnold
Chief Economist and Partner, EY

I am extremely pleased to introduce this report on the economic and social impact of Tottenham Hotspur. The opening of the Club's state of the art Tottenham Hotspur Stadium in 2019 has formed part of a wider ongoing regeneration of the area. The results are impressive – Tottenham Hotspur can be justifiably proud of the increasing impact it generates for the local economy and community.

Our analysis focuses on the 2021/22 season, which saw the return of fans after they had been unable to attend the vast majority of matches the previous season, as a result of the COVID-19 pandemic. Tottenham Hotspur makes a significant economic contribution within the local area and beyond. Overall, the Club's economic activity contributed a total of £344m in Gross Value Added (GVA)¹ and supported over 3,700 jobs in the tri-borough area,² whilst generating £194m of tax in the UK via direct and indirect channels.

Tottenham Hotspur invests a great deal in its local community, both through its Foundation and through wider initiatives undertaken by the Club. The report highlights how the Club and Foundation harness

the power of football to improve the lives of youth, foster employment, develop skills, and promote sport participation, health and wellbeing.

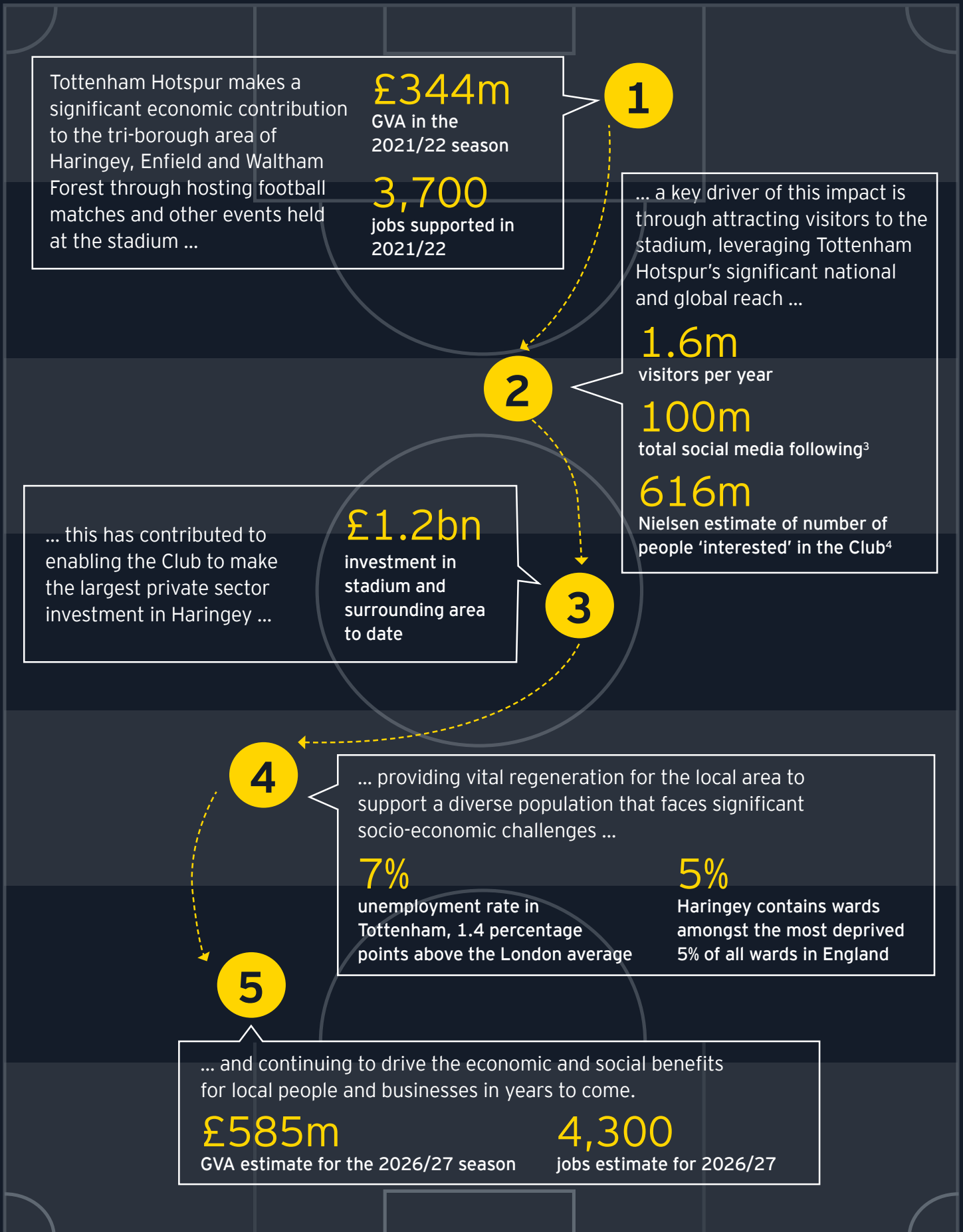
Since the report was carried out, Tottenham Hotspur Stadium has further established itself as a leading sport, leisure and entertainment destination in London. It became the only venue to host five nights during Beyonce's Renaissance World Tour 2023 – grossing \$42.2m, the highest-grossing engagement ever by a woman, a Black artist or any American artist – as well as hosting Red Hot Chili Peppers and Wizkid shows in 2023. The stadium is also included as one of 10 host venues for the UK & Ireland's UEFA EURO 2028.

The Club is passionate about Tottenham and committed to improving the lives and aspirations of those on its doorstep – whether that's through free sporting activity, support for local foodbanks or sponsoring a high-performing Sixth Form College on its stadium campus. The wider stadium development has already delivered benefits within the local area and with increased footfall and further regeneration to come – this is just the start.

1. Gross Value Added (GVA) is a measure of economic activity which can be viewed as the incremental contribution to Gross Domestic Product (GDP). It therefore provides a useful measure for understanding the economic contribution made by particular industries, or businesses, such as Tottenham Hotspur.

2. The tri-borough area is comprised of the London Boroughs of Haringey, Enfield and Waltham Forest. This area is the focus of the analysis in this report, to enable ease of comparison with the impact report commissioned by Tottenham Hotspur in 2015.

Executive summary



3. Tottenham Hotspur.

4. Nielsen 2019/20 Premier League Club Interest study.



Tottenham Hotspur has been an integral part of the community in Haringey for over 140 years, contributing significantly both socially and economically to the Borough and the wider tri-borough area that includes Enfield and Waltham Forest.

A significant contribution to the tri-borough economy ...

Tottenham Hotspur made a £344m GVA contribution to the economy of the tri-borough area in 2021/22 through the hosting of football matches and other events at the Stadium. This contribution was driven by attracting over 1.6 million visitors to the stadium, benefitting a significant number of local businesses.⁵ This, in combination with the many people employed directly by the Club, saw a total of over 3,700 jobs supported by Tottenham Hotspur.

Tottenham Hotspur Stadium is versatile, hosting a wide variety of events, including football matches, NFL games, rugby matches and concerts, as well as serving as a civic building and community hub. This enables the Club to deliver socio-

economic benefits to the tri-borough area that it would not otherwise be able to.

The Club's impact is generated by direct operations, spending in supply chains, wider economic spill-over effects, and the economic benefits of attracting visitors to Haringey and the tri-borough area. Overall, Tottenham Hotspur supported 11 full-time equivalent (FTE) jobs in the tri-borough area for every 10 FTE jobs employed directly. The majority of economic benefits were realised in Haringey, the London Borough in which the Club is based.

When aggregated across Greater London, the total GVA contribution increases to £478m and 5,100 jobs, this is derived from £888m of gross output⁶ stemming from Tottenham Hotspur's presence and activity. This activity generated £194m of tax revenues for the Government.

London Borough of Haringey



Tri-borough area



Greater London



5. Tottenham Hotspur's economic impact was also supported by generating commercial revenues, including broadcast income of £144m.

6. Gross Output is based on the total revenue or turnover in the economy that occurs as a result of Tottenham Hotspur's (and its Stadium's) presence, and the resulting output generated elsewhere in the economy.

... and the wider community

In addition to its economic impact, Tottenham Hotspur also delivers substantial social benefits to the tri-borough area, through the work of its Foundation and wider community programmes. This work is of vital importance, given the level of deprivation in the area: for example, in 2019/20, 25% of children were living in poverty, compared to 19% across London.⁷ The Club supports positive change across the areas of health and wellbeing, education and skills, sustainability, and diversity, equality and inclusion. The Club uses football as a tool for engagement with a diverse range of people and to address issues in the community.

The Street Soccer Academy, Premier League Kicks and To Care Is To Do are examples of programmes that aim to make a positive impact in the community by mentoring disadvantaged young people who are experiencing homelessness, have grown up in the care system or are not in education, employment or training.

Plan to expand impact

Over the next four seasons, Tottenham Hotspur projects there will be increased in-stadium and visitor expenditure as a result of an increased number of events at the stadium. This, in addition to a projected increase in commercial revenue, means that the Club's contribution to the tri-borough economy is expected to nearly double over the next five years, with GVA of £585m in 2026/27,⁸ supporting over 4,300 jobs.

Tottenham Hotspur's expected economic contribution to the tri-borough area in 2026/27⁹

£585m
GVA

4,300
Jobs supported



7. Greater London Authority.

8. The estimated increase in GVA contribution for 2026/27 is in nominal terms, i.e. reflects projected price increases during the period between now and then.

9. Projected GVA and jobs supported figures are based solely on stadium and event impacts (including visitor tourism), and increases in commercial revenues. Wider development activities are excluded and would have impacts additional to these projections.

2

Tottenham in context

2.1. Introduction

2.1.1 This report evaluates the socio-economic impact of Tottenham Hotspur, focusing on a tri-borough area of London which comprises Haringey, Enfield and Waltham Forest, and the wider Greater London region.

2.1.2 The tri-borough area is selected as the geographical area of focus to enable comparison to the 2015 socio-economic impact report commissioned by Tottenham Hotspur. EY's analysis is based on the 2021/22 season and informed by information provided by Tottenham Hotspur, in addition to other sources.

Scope of this report

The report covers the following:

2.1.3 Economic impact:

Club operations: Tottenham Hotspur's day-to-day operations support economic activity directly, as well as local supply chains.

Tourism: Tottenham Hotspur attracts visitors from across the UK and abroad, for football matches, third-party events and visitor attractions hosted at Tottenham Hotspur Stadium.

2.1.4 Social impact:

Activities in the community: various programmes that deliver improved outcomes across health, education and community cohesion.

Key partnerships: Tottenham Hotspur's partnerships with the local community drive important benefits for individuals engaging with the Club and associated programmes.

2.1.5 Future impact:

Following the opening of the Stadium in 2019, Tottenham Hotspur's impact has continued to grow. This analysis forecasts the Club's economic impact in five years' time, during the 2026/27 season.

2.2 Tottenham Hotspur overview

Tottenham Hotspur within the tri-borough area and London

2.2.1 Greater London has a population of nine million, 0.9 million of whom reside in the tri-borough area (including 0.3 million in Haringey).¹⁰

Figure 1: Tottenham Hotspur Stadium and the tri-borough area within Greater London¹¹



10. ONS (2021) Estimates of the population for the UK, England and Wales, Scotland and Northern Ireland.

11. By TUBS – This vector image includes elements that have been taken or adapted from this file: CC BY-SA 3.0, <https://commons.wikimedia.org/w/index.php?curid=17530397>

Tottenham Hotspur Football Club

2.2.2 Founded in 1882, Tottenham Hotspur is one of Europe's leading football clubs having won 14 major domestic trophies (including two league titles) and three European trophies. It is one of only six teams to have competed in the Premier League since its inception in 1992 and competed in the European showpiece Champions League final as recently as 2019.

2.2.3 Its women's team, founded in 1985, has played in the Women's Super League since the 2019/20 season, having secured promotion and gained professional status in 2019.

2.2.4 Off the pitch, the Club does a significant amount of work to benefit the local community. A core part of this is its contribution to the regeneration of the Tottenham area, led by the recent completion of Tottenham Hotspur Stadium. The Club also has a number of initiatives to promote environmental sustainability, diversity and inclusion, and to support charities and good causes. In addition, Tottenham Hotspur Foundation delivers a number of programmes for the benefit of a wide range of participants. Section 4 of this report provides an in-depth assessment of Tottenham Hotspur's social impact.

Tottenham Hotspur Stadium

2.2.5 Tottenham Hotspur played its matches at White Hart Lane stadium from 1899 until the 2016/17 season. The Club announced plans to build a new ground (Tottenham Hotspur Stadium) in 2008, which opened towards the end of the 2018/19 season.¹²

2.2.6 Tottenham Hotspur Stadium has a capacity of 62,850, significantly more than the 36,300 capacity of White Hart Lane. This enables more fans to watch matches live, generating economic benefits to local businesses, as more visitors are attracted to the area to spend money. The expansion has also formed part of the London Borough of Haringey's ongoing planning aspiration to create London's next premier sports and entertainment destination.¹³ The Stadium is multi-purpose, allowing the Club to host a number of third-party events, including NFL games, boxing matches, and concerts, bringing footfall and expenditure outside of matchdays, further boosting the local economy and increasing revenue coming into the Club.

A global brand

2.2.7 Tottenham Hotspur is a globally recognised brand, with an estimated 54 million fans across the world.¹⁴ The Club regularly plays pre-season matches outside of Europe to connect with its fanbase in different countries, most recently travelling to Perth, Bangkok and Singapore for matches in 2023. The club also has a combined global social media following of 100 million across all platforms.¹⁵

2.2.8 This global popularity enables Tottenham Hotspur to welcome fans from across the world for its matches. As one of only 20 Premier League clubs, Tottenham Hotspur's global profile puts the area of Tottenham on the map, and has the potential to create opportunities for inward investment that would otherwise not exist.



12. Matches were played at Wembley Stadium, the England national team's home stadium in north-west London, in the interim.

13. Tottenham Hotspur.

14. Tottenham Hotspur; Nielsen.

15. Tottenham Hotspur.

2.3 Socio-economic context

Deprivation

2.3.1 Both Tottenham and the wider tri-borough area face more challenging socio-economic conditions than much of London and the UK as a whole. In 2019, Haringey contained wards amongst the 5% most deprived wards in England.¹⁶ This creates a risk that parts of the local community are disenfranchised, which in turn increases the relevance of the Club's community programmes.

2.3.2 Median gross weekly pay in the tri-borough area was £631 in 2020, 17% and £130 below the London average. Tri-borough earnings increased by 21% from 2014¹⁷ to 2020, by comparison to 15% for London (in nominal terms¹⁸).

2.3.3 12 years after the Tottenham Riots, North Tottenham remains the most deprived area of the London Borough of Haringey and is within the top 10% most deprived neighbourhoods in England. In addition, 20.7% of households in Haringey are considered to be overcrowded – the sixth highest in London.¹⁹

17%

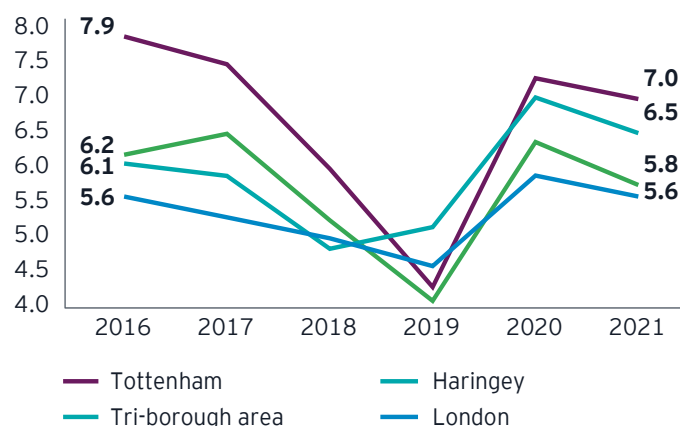
Earnings gap between the tri-borough area and London average

Unemployment

2.3.4 Figure 2 shows that the unemployment rate has been higher in the tri-borough area than London as a whole, with the exception of 2018.

2.3.5 The COVID-19 pandemic and resulting lockdowns in 2020 meant unemployment increased throughout London. However, the tri-borough area was harder hit, leading to an increase of 1.6 percentage points (pp) – compared to 1.3pp in London generally – to a peak unemployment rate of 6.7% in 2020.²⁰

Figure 2: Unemployment rate, proportion of residents, 2016-2021 (%)



Source: Office for National Statistics (ONS) UK



16. English Indices of Multiple Deprivation 2019; <https://data.london.gov.uk/blog/indices-of-deprivation-2019-initial-analysis/>

17. 2014 was the final year of the period examined in the equivalent analysis in the previously commissioned socio-economic impact of Tottenham Hotspur.

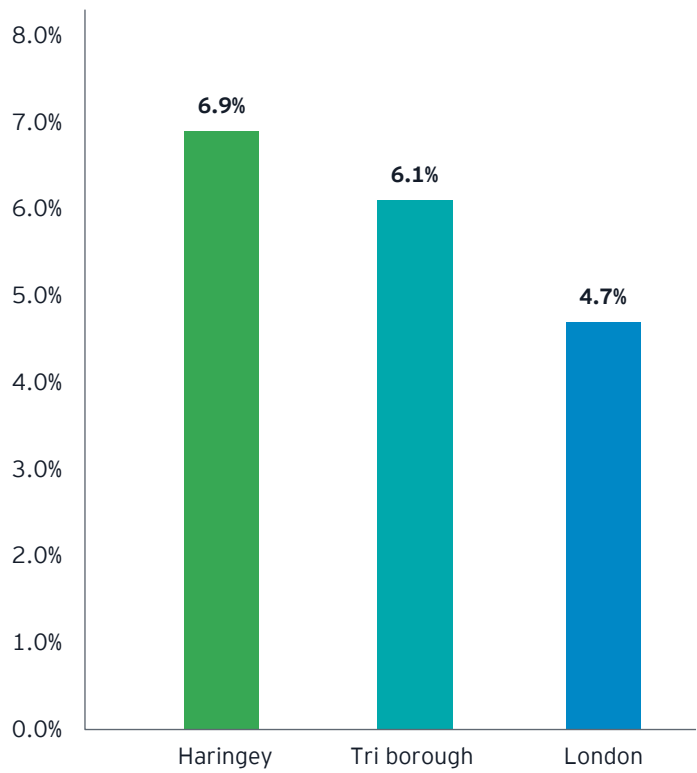
18. The stated earnings increases have not been adjusted for inflation.

19. OCSI – Census 2021.

20. Office for National Statistics (ONS) UK.

2.3.6 The number of people claiming unemployment related benefits can be reflective of a level of poverty and lower standards of living. Figure 3 shows that there is a higher proportion of the population claiming job seekers allowance and universal credit in Haringey than the rest of the tri-borough, which in turn is higher than the London average, illustrating one aspect of a challenging socio-economic environment.

Figure 3: Claimant Count of Job Seekers Allowance and some Universal Credit Claimants (%)

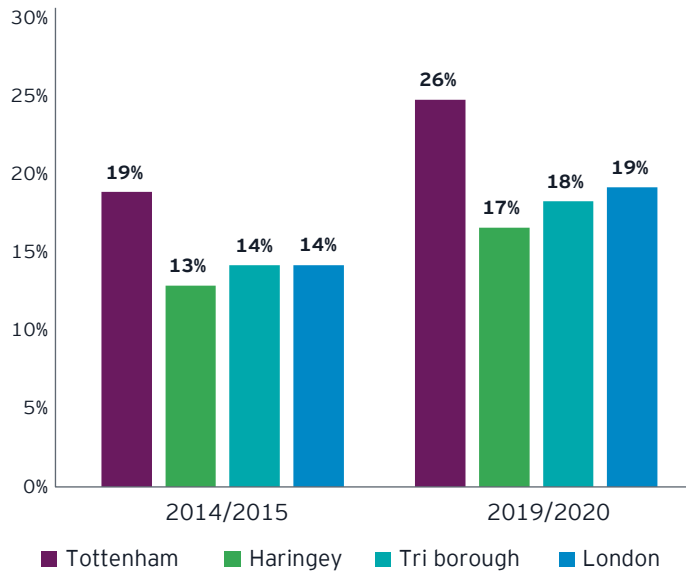


Source: ONS

Child poverty

2.3.7 Figure 4 shows that child poverty²¹ in Tottenham²² was 26% in 2019/20, seven percentage points above the figure for London. This gap appears to be widening: in 2014/15, 19% of children in Tottenham lived in poverty, compared to 14% in London as a whole.²³

Figure 4: Child poverty (%), 2014/15 vs 2019/20



Source: Greater London Authority

2.3.8 Tottenham Hotspur contributes to the education of children in the local area through its investment in the London Academy of Excellence Tottenham (LAET) school. LAET has had an immediate impact, increasing educational standards and attainment. Refer to Section 4.3 for further details of LAET.

Crime

2.3.9 Crime in North Tottenham is 78% higher than the London average, including a 92% and 45% higher ‘violence against the person rate’ compared to London and Haringey respectively.

2.3.10 Several surveys of Haringey residents suggest that crime is prevalent enough to damage perceptions of public safety:

- ▶ 15% of residents say they feel unsafe when outside in their local area after dark.²⁴
- ▶ Residents of North Tottenham (49%) and West Green & Bruce Grove (24%) are most likely to say they feel unsafe after dark.²⁵
- ▶ 11% of Year 8 and 10 students in Haringey report having been a victim of violence or aggression in the area where they live in the last 12 months.²⁶

21. Child poverty is defined as children under 16 living in low income families.
 22. Tottenham is defined for the purposes of this comparison as covering the wards of Tottenham Green, Tottenham Hale, Northumberland Park, White Hart Lane and Bruce Castle.
 23. Greater London Authority.
 24. Haringey at a glance – State of the Borough December 2021.
 25. Haringey Residents Survey 2018.
 26. Health Related Behaviour Survey 2017.

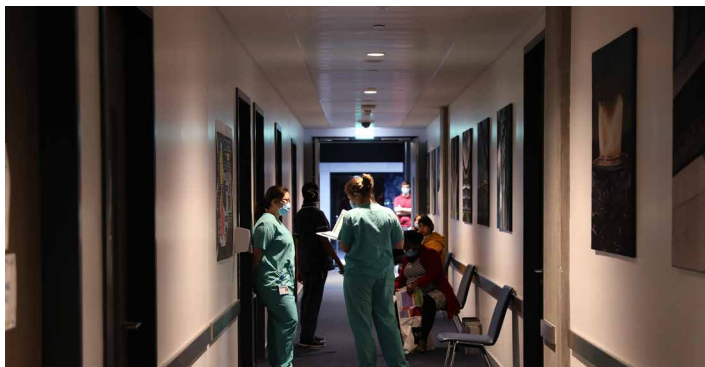
2.4 Regeneration: Tottenham Hotspur Stadium

Overview

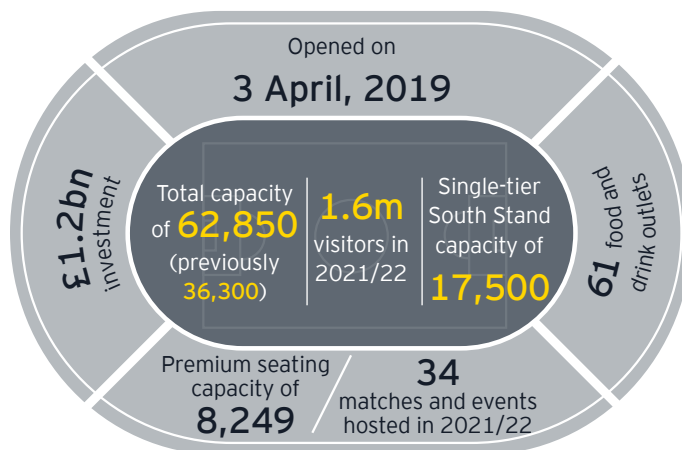
2.4.1 Tottenham Hotspur has long been embedded in the Tottenham community, having called the area home for over 140 years.

2.4.2 Following the riots of August 2011, which originated in Tottenham, the Club pushed forward with the construction of the new stadium as well as a host of associated infrastructure, including new Club offices, a new supermarket, new schools, a permanent home for the Tottenham Hotspur Foundation, and the Tottenham Experience – a seven-day-a-week leisure destination that includes the Spurs Shop, Stadium Tours and the Dare Skywalk.²⁷

2.4.3 The new stadium forms part of the wider ongoing Northumberland Development Project (NDP), which totals £1.2bn investment by the Club to date. As well as the stadium itself, this includes development of residential, commercial and public realm elements on the surrounding land.²⁸ This represents the largest private investment Tottenham has seen.²⁹



The new Stadium in numbers



2.4.4 The stadium provides a civic building and community asset that extends beyond the world of sport, entertainment and leisure. Since opening:

- ▶ Nearly **9,000** local people received COVID-19 jabs at the stadium.
- ▶ **41,500** appointments were held by the North Middlesex Hospital, having temporarily transferred its Women's Outpatient Services to the stadium during the first COVID lockdown.
- ▶ The stadium accommodated drive through **COVID-19 testing** from April 2020 – February 2021.
- ▶ A **blood donation event** was held in June 2021, encouraging more people from the Black community to become blood donors.
- ▶ The stadium was Haringey **Council's hub** for the general election vote count in December 2019 and local Council elections in 2022.

“

We did not just want to build a stadium. We wanted to change the prospects for those that live in this part of London. We see it as bringing hope, prosperity and uplift to Tottenham, embracing the local community. If you live here, you should be able to study, work and play here.

Daniel Levy, Chairman, Tottenham Hotspur

27. Tottenham Hotspur, To Care Is To Do.

28. The southern end of the site is still to be developed, including a hotel, leisure facilities and residences.

29. Tottenham Hotspur.

Northumberland Development Project³⁰

2.4.5 The NDP is a mixed-use development project that centres around the new Tottenham Hotspur Stadium, built on the site of the old White Hart Lane stadium in 2019.

2.4.6 Phase 1 of the NDP was the Northern Development, a new five-storey building accommodating the largest central London Sainsbury's store and Gym, with 402 undercroft parking spaces in use on matchdays and non-matchdays. The upper levels are home to the award-winning London Academy of Excellence Tottenham and Tottenham Hotspur's offices.³¹

2.4.7 The development also includes the Tottenham Experience – home to Europe's largest Club Shop, Stadium Tours, the Dare Skywalk and Dare Skywalk Edge. Future plans include 585 new homes and a 180 room hotel, and F1 DRIVE – London, the world's first in-stadium electric karting facility, in partnership with Formula 1.

Wider regeneration of the Tottenham area

2.4.8 The Club's history is closely intertwined with the heritage of its local area, much of which has been restored and incorporated into the wider stadium development scheme. This includes Warmington House – home to the OOF Gallery;³² Percy House – the headquarters of the Tottenham Hotspur Foundation, Northumberland Terrace (home of the Sarabande

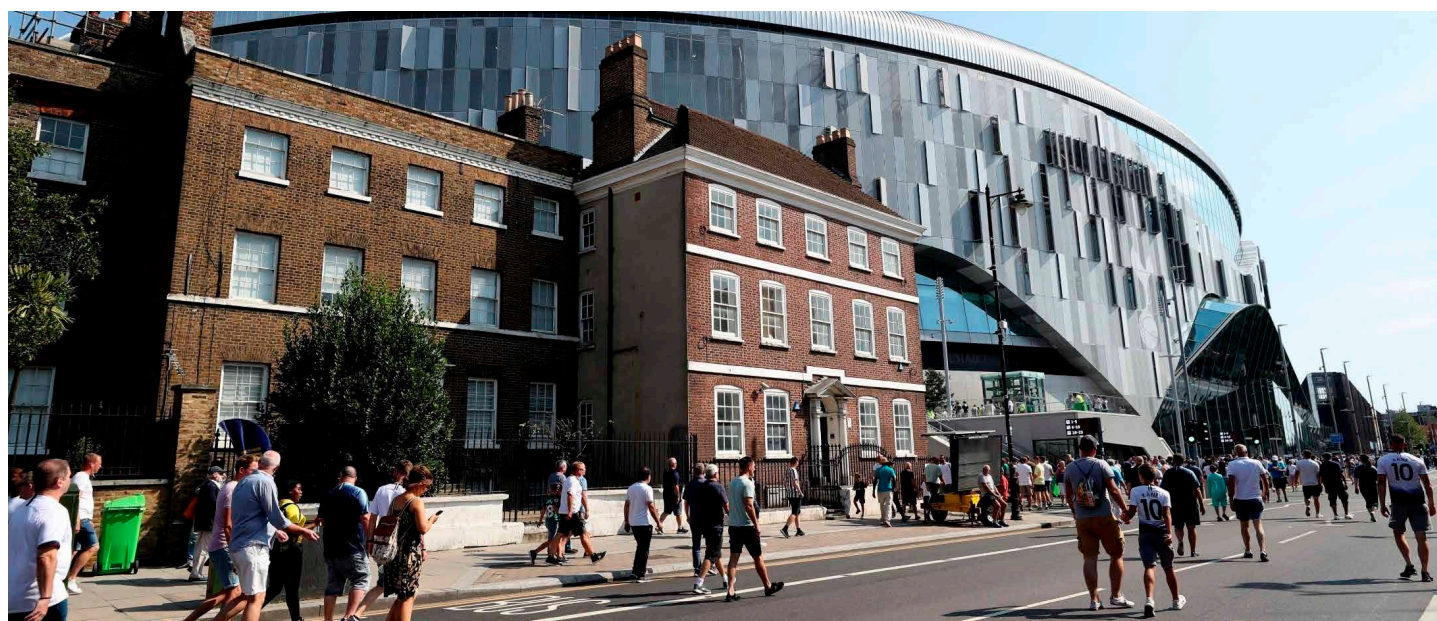
Foundation);³³ and the Corner Pin pub – now operated by Tottenham-based Beavertown brewery.

2.4.9 The scheme has facilitated the delivery of 400 new homes in the local area, over 70% of which is affordable housing.³⁴

Concerts at Tottenham Hotspur Stadium³⁵

Tottenham Hotspur Stadium hosted five concerts from Beyoncé's Renaissance World Tour from 29 May to 4 June 2023 attracting both tourism and investment into Tottenham:

- ▶ During the week of the concerts, figures from Haringey Council show an increase in footfall on Tottenham High Road of over 104,000, an increase of 60% on the previous week.
- ▶ Chuku's, a Nigerian tapas restaurant situated on the High Road, received an £8,000 funding grant from the Beyoncé's BeyGOOD foundation in advance of the concerts.
- ▶ 500 tickets were distributed by the Club to community groups, local projects and residents.



30. Northumberland Park is a ward in the Tottenham area of London Borough of Haringey, in Greater London, England.

31. KSS Group, Northumberland Development, Haringey – Project Details.

32. OOF Gallery is a contemporary art gallery focused on football, located in Warmington House at Tottenham Hotspur Stadium.

33. The Sarabande Foundation, established by the late designer Lee Alexander McQueen, provides scholarships and studio space for artists and hosts various events.

34. Tottenham Hotspur, To Care Is To Do.

35. Tottenham Hotspur.



3.1 Approach to measuring economic contribution

3.1.1 Tottenham Hotspur makes a significant economic contribution to Haringey, the tri-borough area and Greater London. This is driven by the stadium's major events and visitor attractions bringing an increased number of people to the area throughout the year.³⁶ The impact of these activities can be broken down into three categories:

Direct impact	Resulting from the Club and the Foundation's activities, and visitors' expenditure in the stadium and at local businesses on event days. ³⁷
Indirect impact	The additional economic activity in the region that occurs through the Club's supply chains.
Induced impact	The additional activity supported by employment incomes received by Club employees and those in the Club's supply chain.

3.1.2 This report considers the economic footprint of Tottenham Hotspur, the activities of the Club and its contribution to the wider economy through visitor spending. Figure 5 overleaf presents an overview of Tottenham Hotspur's key impact drivers, which inform the analysis. It is likely that there are further impacts resulting from the Club's activities, such as through connections with the retail and media sectors, which are not fully captured within this report.

3.1.3 In addition, the analysis provides a comparison with the results within the last socio-economic impact report commissioned by Tottenham Hotspur in 2015.

Gross Output	Gross value added	Employment	Tax receipts
Gross Output is based on the total revenue or turnover in the economy that occurs as a result of Tottenham Hotspur's (and its Stadium's) presence, and the resulting output generated elsewhere in the economy.	- Gross Value Added (GVA) reflects the additional value to the economy that is created from Tottenham Hotspur's (and its Stadium's) presence. - This study focuses primarily on the GVA impact over gross output. GVA broadly equates to profits and employee salaries generated at each stage of the supply chain.	The total number of full time equivalent (FTE) jobs created or supported by the total direct, indirect and induced effects of Tottenham Hotspur's (and its Stadium's) presence.	- The revenue generated for the Exchequer as a result of the economic activity (direct, indirect and induced). - Taxes include employee income tax and National Insurance, VAT and corporation tax.

36. Whilst the 2021/22 season was largely unaffected by the COVID-19 pandemic, there may have been some impact of the emergence of the Omicron variant in November and December. Many people were forced into isolation and therefore may not have attended events at the Stadium that they otherwise would have.

37. Direct activity also includes the activities of Tottenham Hotspur Foundation, Northumberland Park Sainsbury's Superstore, and The London Academy of Excellence Tottenham (LAET).

Drivers of impact

3.1.4 Tottenham Hotspur's operations contribute to economic activity in Haringey and across the tri-borough area and the wider London region. The graphic provides an overview of some of the key statistics which feed into the economic impact analysis.

Figure 5: Tottenham Hotspur, economic impact drivers in the tri-borough area³⁸



38. EY figures: based on analysis of Tottenham Hotspur's information, UK national accounts data and various other sources.

39. Visitor economy contributions form part of the wider GVA and employment economic impact figures reported throughout this report. All figures presented in this section relate to the 2021/22 season, unless stated otherwise.

40. Additional spend is undertaken by international visitors and 'non-local' visitors, being those who reside in the UK but outside of the tri-borough area.

41. NFL game impacts are relatively high compared to other types of third-party event, driven by significant levels of visitor spend (including hotel expenditure) and commercial activity.

Economic impact of third-party events at Tottenham Hotspur Stadium

As well as Tottenham Hotspur football matches, Tottenham Hotspur Stadium has hosted a wide range of third-party events since opening in April 2019, including NFL, rugby, boxing and concerts.

Third-party events drive significant economic benefits to the local area surrounding the stadium, enabling greater contribution to the local economy through money spent by visitors to the stadium on accommodation, transport, food and drinks.

In addition, third-party events drive economic impacts through:

- Salaries of stadium employees
- Hire fees
- In-stadium visitor expenditure

The estimated impacts of each type of event (per event) are:

Figure 6: GVA contribution per third-party event type (£m)⁴¹

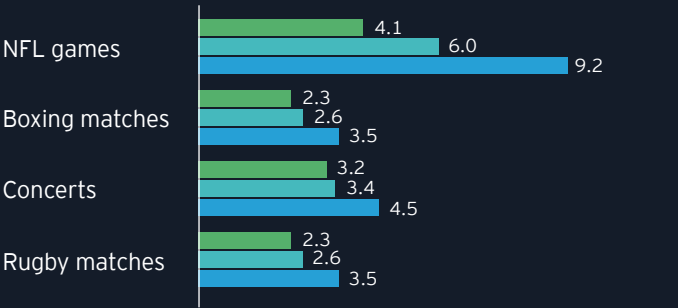
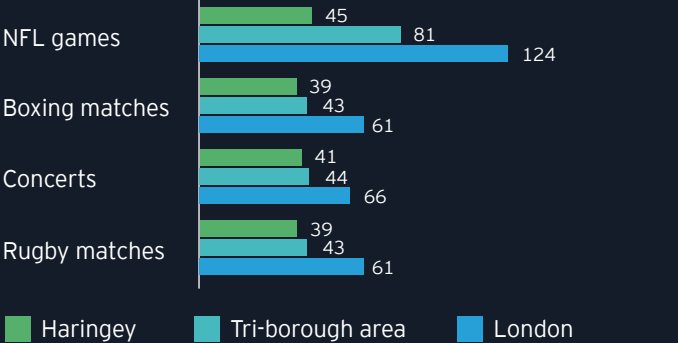


Figure 7: Jobs supported per third-party event type (FTEs)



During 2021/22 (and the following summer), the Stadium hosted two NFL games, two rugby matches, four concerts and a boxing match, generating £47m of GVA and over 700 jobs across London.

3.2 Gross value added

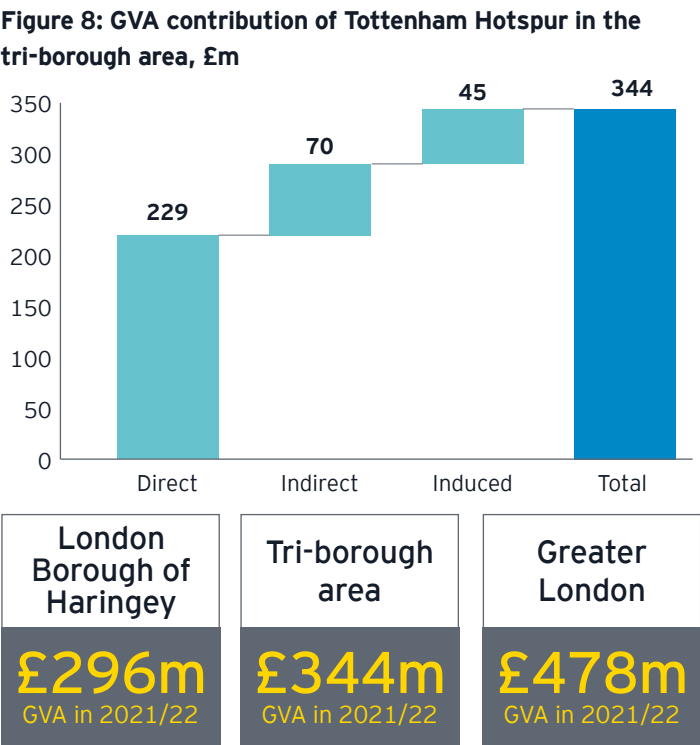
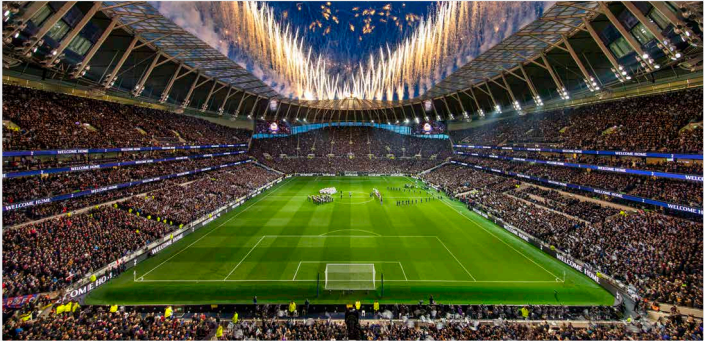
3.2.1 Tottenham Hotspur and its wider activities drive significant contributions to the local economy. These are quantified by GVA, which captures the additional economic value generated at each stage of the Club's impact.

3.2.2 The starting point of our analysis is the direct GVA generated by the Club. This has two components: (i) 'onsite' activity, based on the expenditure of visitors within the stadium⁴² and the profits earned by the Club; and (ii) 'offsite' activity, direct visitor expenditure outside the stadium in the local economy.⁴³ Each of these has knock-on indirect and induced impacts.

3.2.3 Tottenham Hotspur generated a total GVA contribution of £344m in the tri-borough area in 2021/22, including both onsite and offsite activity. £229m of this relates to the direct (onsite and offsite) impact of Tottenham Hotspur's activities. A further £70m is stimulated by spending within the Club's local supply chains and £45m from spending of employment incomes.

3.2.4 Within the London Borough of Haringey, Tottenham Hotspur contributed GVA of £296m.

3.2.5 Across Greater London, Tottenham Hotspur generated £478m in GVA. This is derived from £888m of gross output in London.⁴⁴



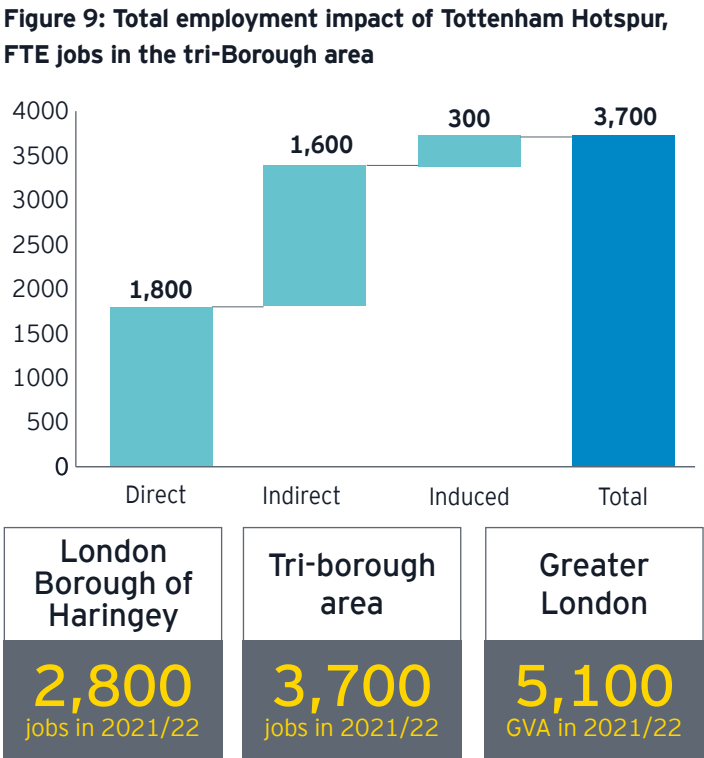
3.3 Employment

3.3.1 Tottenham Hotspur supported 3,700 FTE jobs in the tri-borough economy in 2021/22, increasing to 5,100 FTE jobs across Greater London.

3.3.2 1,800 FTE jobs were directly employed by the Club, with 1,600 supported throughout supply chains (the indirect effect) and a further 300 as a result of induced effects.

3.3.3 In Haringey specifically, the Club contributed 2,800 jobs.

3.3.4 Overall, Tottenham Hotspur supported 11 FTE jobs in the tri-borough area in total for every 10 FTEs employed directly by the Club.



42. Onsite activity also includes the activities of Tottenham Hotspur Foundation, Northumberland Park Sainsbury's Superstore, and LAET.

43. EY analysed data from the ONS and VisitBritain on spending patterns of domestic and international tourists in the UK to derive an estimated spending profile for visitors.

44. In 2021/22 the estimated gross output generated in the London Borough of Haringey was £663m, whilst in the tri-borough area it was £693m. The gross output is based on the Club's revenue or turnover, and broader output impact in the economy. This is used to derive GVA, which measures the additional value to the economy, and is the focus of this study.

Economic impact of NFL games at the Stadium

During the 2021-22 season, Tottenham Hotspur Stadium hosted two NFL games, generating significant economic impacts for Haringey and for Greater London. Approximately 116,000 spectators attend NFL games at the Stadium each season; around 26% of these reside in London, 51% travel from elsewhere in the UK, and 23% are from overseas (with 5% of the total travelling from the US).

Visitor expenditure assumptions were estimated based on a spectator's origin (i.e. reside in the UK or overseas) and whether or not they stayed overnight, using survey data provided by the NFL and corroborated with data from the ONS and VisitBritain on spending patterns of domestic and international tourists in the UK.

£18m

Greater London GVA impact of the NFL per season, 50% of which direct

3.4 From White Hart Lane to Tottenham Hotspur Stadium

GVA

3.4.1 Tottenham Hotspur's 2021/22 GVA tri-borough contribution of £344m represents a 129% real terms increase on its 2015 contribution, when the Club played its matches at White Hart Lane stadium. The increase is primarily driven by:

- Greater numbers of visitors to the area, due to the increased stadium capacity and third-party events.
- Renewed broadcast arrangements.

Employment

3.4.2 Tottenham Hotspur's 2021/22 employment tri-borough contribution of 3,731 FTEs represents a 103% increase on its 2015 contribution. This increase is primarily driven by:

- An expansion of the Club's direct employment.
- Increased activity driven throughout the local economy as a result of more visitors coming to the area to visit the stadium.

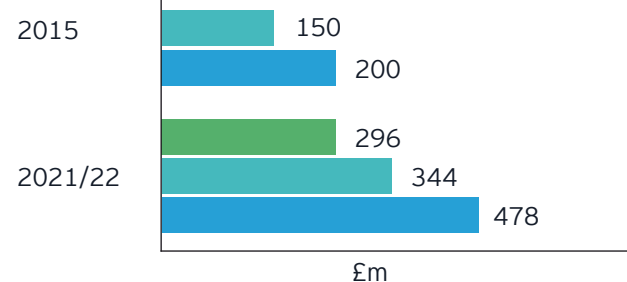
Tax

3.4.3 Tottenham Hotspur's 2021/22 tax contribution of £194m represents a 397% real terms increase on its 2015 contribution.⁴⁵ The increase is primarily driven by:

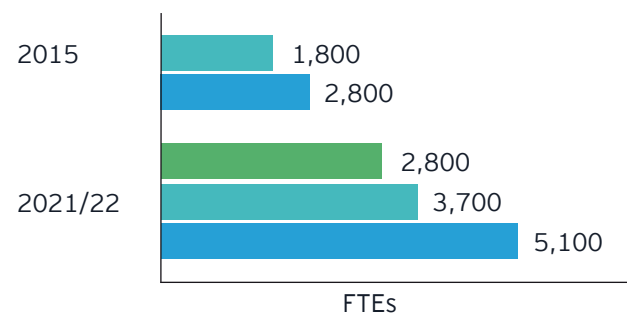
- Increased taxation paid by Tottenham Hotspur.
- Increased taxation paid by local businesses, due to a greater number of visitors to the tri-borough area and Greater London.
- Increased taxation paid throughout Tottenham Hotspur's supply chain.

Figures 10-11: Tottenham Hotspur's economic impact over time⁴⁶

GVA

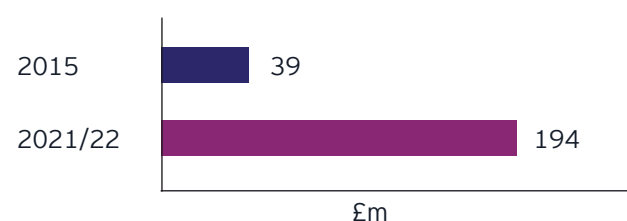


Employment



Legend: Haringey (Green), Tri-borough area (Teal), London (Blue)

Figure 12: Tottenham Hotspur's tax contribution over time⁴⁷



45. A nominal tax contribution consistent with the aggregate level of activity in the tri-borough area has been calculated. This entails using UK national accounts to estimate tax-to-GVA ratios for each tax, and applying these to Tottenham Hotspur's direct tax contributions to estimate indirect and induced tax generated by the Club's operations. The indirect and induced estimates are then added to the direct tax figure to arrive at a total tax contribution.

46. 2015 GVA figures are presented in constant 2022 prices. The 2015 nominal terms GVA contribution was estimated to be £123m, in the tri-borough area and £163m across London.

47. The 2015 tax figure is presented in constant 2022 prices. The 2015 nominal terms figure was estimated to be £32m.

4

Social contribution

4.1 To Care Is To Do

4.1.1 As a Premier League football Club with a global fanbase of millions, Tottenham Hotspur has the ability to use its unique platform to inspire and drive positive social change, advocate and raise awareness for good causes, instil a sense of pride and belonging amongst its fans, and contribute to prosperity and wellbeing to those living within the local community.

4.1.2 The Club recognises this responsibility and has a wide-ranging Corporate Social Responsibility programme at its core, focusing around the following areas:

- ▶ The Stadium-led regeneration of Tottenham
- ▶ Diversity & Inclusion
- ▶ The work of the Club's charitable Foundation
- ▶ Support for charities and good causes
- ▶ Environmental sustainability



4.2 Foundation programmes

4.2.1 Established in 2007, the Tottenham Hotspur Foundation is committed to creating life-changing opportunities for people across North London.

4.2.2 The Tottenham Hotspur Foundation has a long established and valued partnership with its local communities where there are significant socio-economic challenges. The Foundation delivers a range of creative, innovative and engaging programmes for people across the Club's local communities, strategically linked with national and local government agendas across two key areas: Youth, Employment and Skills, and Football, Sports, Health and Wellbeing. Examples of existing programmes include:



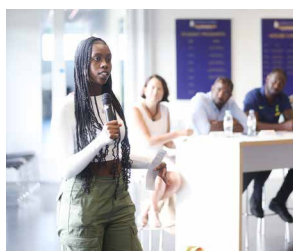
National Citizenship Service

Tottenham Hotspur Foundation is the delivery partner in Haringey, Enfield and Barnet for a two-week programme that aims to engage, unite and empower young people, building confidence and life skills to drive achievement, regardless of background, involving a residential trip followed by social impact project planning.

“

I can whole heartedly say NCS is the best programme I've ever participated in, in my whole entire life. I completed NCS with the Tottenham Hotspur Foundation from the 1st of August to the 12th of August. Our wave leaders were incredibly nice, they came with great vibes and energy, but were also empathetic. I was feeling poorly on the first night of the residential, and immediately the next day Tayo and Jadon did what they could to help me out and I was back to feeling 100% in no time. The people that I met on this wave were amazing and I am definitely not going to forget any of them. I am grateful to the Tottenham Hotspur Foundation for hosting the NCS programme that I attended and I know my life will be better because of it. Thank you!

Crystall, National Citizenship Service participant



Jobs Fairs

Hosted at Tottenham Hotspur Stadium, employers from a wide range of sectors are invited to exhibit job and apprenticeship opportunities to local people. The stadium held two Jobs Fairs in 2021/22, attended by over 3,500 people.

“

I was at the lowest point I could possibly be at — I thought my life was over and that nobody was going to employ someone with a criminal record. Approaching the end of my sentence, I saw that Tottenham Hotspur were recruiting in the prison I was at. I secured day-release to come to an interview and was put on a 2-week Customer Service course — from there, it's just been amazing. I've achieved so much and I'm now a Supervisor — I absolutely love it. If it wasn't for Tottenham Hotspur, I'd probably be back in jail.

Samantha, employed in the stadium on matchdays following a Tottenham Hotspur Foundation Jobs Fair



Street Soccer Academy

Street Soccer Academy is a personal development (Mindset coaching) and soft skills improvement programme delivered over ten consecutive weeks (one session per week), typically for 17-25-year-olds who are currently experiencing homelessness. They may include previous young offenders, long term unemployed and young people Not in Education, Employment or Training (NEET).

The programme aims to improve the mindset of participants, help to identify employability areas of both capability and interest, and develop key essential soft skills so individuals taking part will be ready and able to move into work, education or further training after successfully completing the programme. The emphasis is on fun, inclusion and wellbeing with the overarching aim to help make a difference to communities and the lives of disadvantaged young people.

Stats and Outcomes (2021-22)

- ▶ Two academy groups supported
- ▶ Total supported young participants: 24
- ▶ Total hours of support and education delivered: 80
- ▶ 92% of participants felt more positive and hopeful about their immediate future after successfully completing the Street Soccer Academy programme
- ▶ 83% of participants said they were more motivated to make a change in their life for the better as a result of successfully completing the Street Soccer Academy programme

- ▶ 100% of participants confirmed that by completing the Street Soccer Academy programme it had helped to improve their physical and mental health

Jonathan's story has been a prime example of what the programme fully represents from start to finish. He joined Street Soccer during the summer programme of 2021, initially seeming disinterested and quiet having previously been released from a football Club Academy. His interest in football was his main motivation in joining the programme. Jonathan's progression throughout his time with Street Soccer has been transformational, from being reserved and withdrawn to showing great leadership and even assisting with delivering football sessions. This year, Jonathan was offered a Traineeship with the Tottenham Hotspur Foundation, learning the different roles across all departments in the Foundation as well as continuing with the Street Soccer Academy Programme as a coach.



Jonathan, Tottenham Hotspur Foundation Trainee and Street Soccer Academy Programme coach

“

[Being released from a football club] destroyed me — I didn't know how to feel good. I fell out with my Nan, who I was living with, and ended up homeless. Imagine waking up every day thinking 'where am I going to sleep tonight?' — no-one should live like that. After spending a year on the Street Soccer programme, I've completely changed — I'm talkative and bubbly again. I realised I needed those life skills that it teaches to get myself back on my feet. I don't know where I'd be without it because I was crushed. Now I'm back to dreaming of becoming a professional footballer, or at least getting into coaching.

Jonathan Mady, Street Soccer participant

Premier League Kicks

Through the Premier League Kicks programme, Tottenham Hotspur Foundation works with young people at risk of becoming victims or perpetrators of serious youth violence, empowering participants through the delivery of bespoke workshops and activities based on individual needs. The programme inspires children and young people to achieve their potential and improve their wellbeing; working together to build stronger, safer and more inclusive communities.

“

I have been a part of this programme since the age of 14 and it has helped me become the person I am today. I have loved the journey from a Kicks participant, all the way through to now being a coach and I look forward to running more sessions with many more incredible young people.

Jadon Anderson, came through the Kicks programme and is now employed as a Global Football Development coach



NHS Health Checks

Based at community venues such as sports centres and libraries, delivered by our 'Spurs Nurse' with the aim of using the appeal of football to target men aged 45+ who are reluctant to visit a GP.

“

If it wasn't for the Spurs Nurse getting me to stop smoking, I'd have lost my leg.

Peter, a beneficiary of NHS Community Health Checks

To Care Is To Do

Flagship programme supporting children growing up in care, young adults leaving the care system and those who have left it, through mentoring, work experience and extra-curricular activities such as days out and cookery classes.

This programme is needed as children in care are statistically less likely than their peers to achieve top grades throughout all years of school. Research shows that 40 per cent of care leavers aged 19 to 21 are not in education, employment or training (NEET), compared to 13 per cent for this age group overall.

In 2021, the number of children looked after (CLA) by local authorities in England rose to 80,850, up 1% on the previous year and continuing the rise seen in recent years. Approximately 400 of these children reside in the local borough of Haringey.

To Care Is To Do delivers a range of personal development and enrichment activities including money management courses, social events and days out, cultural visits and counselling. In 2021/22, this programme achieved:

- ▶ 135 nominations for the Haringey Academic Achievement Awards (based on learning achievements and community engagement)
- ▶ 20 referrals for 1-2-1 mentoring based on a 12 week model of confidence building, public speaking, career development and transition into college/school.
- ▶ 83 individuals engaged in group sessions
- ▶ 63 1-2-1 and group sessions delivered

“

Going into care was tough but Spurs supported me along my journey. I'm now in the Sixth Form and hoping to go to University.

Wisdom, To Care Is To Do participant



Tottenham Hotspur Foundation has delivered To Care Is To Do for more than 15 years as it aims to help reduce the gap in educational achievement between children in care and their peers.

Shape Up With Spurs

A free health and activity programme delivered at community centres within Haringey and Enfield to promote health and wellbeing amongst local residents. Sessions include boxercise, yoga, pilates and cardio classes.

“

I never miss a session. The first time I came here, I was very nervous as I hadn't done anything for myself for such a long time, but the group was so welcoming. I left feeling so good that I just wanted more. We're all of different abilities and you don't worry about coming here — it's all inclusive. If I had to pay for these sessions, I wouldn't be able to afford it — it's fantastic and long may they continue.

Dawn, Shape Up With Spurs participant



4.2.3 The table below highlights additional Tottenham Hotspur Foundation programmes across its focus areas.

Programme	Overview
Premier League Primary Stars	Using appeal of football to inspire children to learn, be active and develop important life skills, Foundation coaches deliver educational sessions to help build students' confidence in the classroom, using examples from football to improve communication.
Premier League Inspires	A 10-week educational programme aimed at inspiring and motivating young people aged 11-16 who are disengaged at school, using the theme of football and sport to improve their attitude, relationships, and behaviour.
Move 4 You	Supports those living with and beyond cancer to remain active during and after treatment through a 12-session programme delivered by a specialist rehabilitation instructor, tailored to individual needs.
Employment Drop-in sessions	Hosted every Thursday at Percy House to allow residents to meet with an employment advisor who can support with CVs and interview preparation.
Spurred 2 Coach	A 6-week project which offers individuals the opportunity to get into football coaching and gain an FA Level 1 Qualification.

4.3 The London Academy of Excellence Tottenham

4.3.1 As part of the development of Lilywhite House, adjacent to the stadium, the Club decided to create an elite educational facility to sit alongside its new Club offices.

4.3.2 LAET is a state-funded Sixth Form, sponsored by the Club and Highgate School – the principal academic sponsors – who together with support from other leading independent schools, deliver expert teaching.

4.3.3 It prioritises local students most likely to benefit from an academically-rigorous curriculum and those from disadvantaged socio-economic backgrounds, giving Tottenham's brightest students the best possible chance of accessing top universities.

4.3.4 This is in the context of the school being situated within one of the 2% most deprived wards in the country, with 63% of its student body coming from the lowest two social groups, – being described as living in “struggling estates” or “difficult circumstances” – using the ACORN tool for socio-economic analysis.



Key Achievements

1

LAET was named the **Sunday Times Sixth Form College** of the Year, 2020 by Parent Power, The Sunday Times School Guide

2

In 2022, LAET achieved an '**Outstanding**' Ofsted rating across all areas

3

A-Level results have continued to improve year-on-year, with 2023 seeing an incredible **37% of grades** either A* or A with 72% A*-B – both significantly above national averages

4

Nearly **three quarters of students have gone onto Russell Group Universities** compared to 1% of Tottenham school leavers the year before LAET opened, with 45 students winning places at the Universities of Oxford or Cambridge since the school opened in 2017 and others electing to undertake prestigious apprenticeships

5

The achievements put LAET within the **top 2%** of state Sixth Forms nationally



5

Future economic contribution

number of events at the stadium

5.1 Future economic impact

5.1.1 This section of the report assesses the economic impact that Tottenham Hotspur is anticipated to deliver for Haringey, the tri-borough area and across London over the next five seasons.

GVA

5.1.2 Tottenham Hotspur's GVA tri-borough contribution is forecast to grow to £585m by the 2026/27 season, an increase of 70% over five seasons (in nominal terms). The increase is primarily driven by:

- Increased in-stadium visitor expenditure
- Wages and salaries paid to an increased number of local non-playing staff
- Renewed sponsorship and commercial arrangements.

5.1.3 The Club's GVA impact in the London Borough of Haringey is anticipated to grow from £296m in 2021/22 to £549m in 2026/27. Across London, the GVA impact during this period is forecast to increase from £478m to £748m.

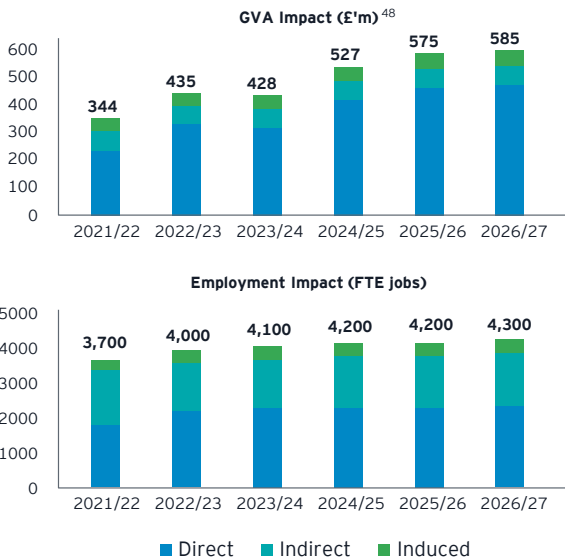
Employment

5.1.4 Tottenham Hotspur's tri-borough contribution in terms of employment is forecast to grow to nearly 4,300 FTEs by the 2026/27 season, an increase of 16% over five seasons. This increase is primarily comprised of an expansion of the Club's non-playing staff employment.

5.1.5 The number of jobs supported by Tottenham Hotspur in the London Borough of Haringey is forecast to grow from 2,800 in 2021/22 to 3,100 in 2026/27. Across London, the Club's employment may increase from 5,100 to 5,700 in the same period.

Figures 13-14: Tottenham Hotspur's forecast tri-borough economic impact over time

London Borough of Haringey	Tri-borough area	Greater London
£549m	£585m	£748m
GVA in 2026/27	GVA in 2026/27	GVA in 2026/27
3,100	4,300	5,700
jobs in 2026/27	jobs in 2026/27	jobs in 2026/27



48. The reduction in GVA in 2023/24 reflects reduced revenue growth as a result of not playing European football in that season.

5.2 Future development plans

5.2.1 In addition to the significant investment that has been made in developing the Tottenham area to date, Tottenham Hotspur plans to develop nearly 1,500 new homes, a 180-bed hotel, leisure and cultural facilities.

5.2.2 These developments will drive economic activity in the tri-borough area through several channels:

- ▶ An increase in the population, with new homes likely to attract residents from outside the tri-borough area, thereby helping increase demand for local business.

- ▶ Increased local tourism, as visitors to the area make use of the hotel. This would generate income for the hotel itself, as well as increasing footfall for local businesses.
- ▶ New leisure and cultural facilities would have a similar impact, generating income directly and attracting more visitors to the tri-borough area. Fresh guidance from the Department for Levelling Up, Housing and Communities values the amenity impact of placemaking as part of a wider urban regeneration scheme.

Planned future developments

Goods Yard

Providing up to 500 new homes, including affordable homes, delivered across seven buildings. It will also include new public green spaces for the community to enjoy.

The Depot

Providing up to 400 new homes, including affordable homes, across four new buildings. It will also include well-designed new green spaces and a public realm, including a brand-new park, and the sensitive restoration of the Grade II listed building at 867-869 High Road.

Printworks

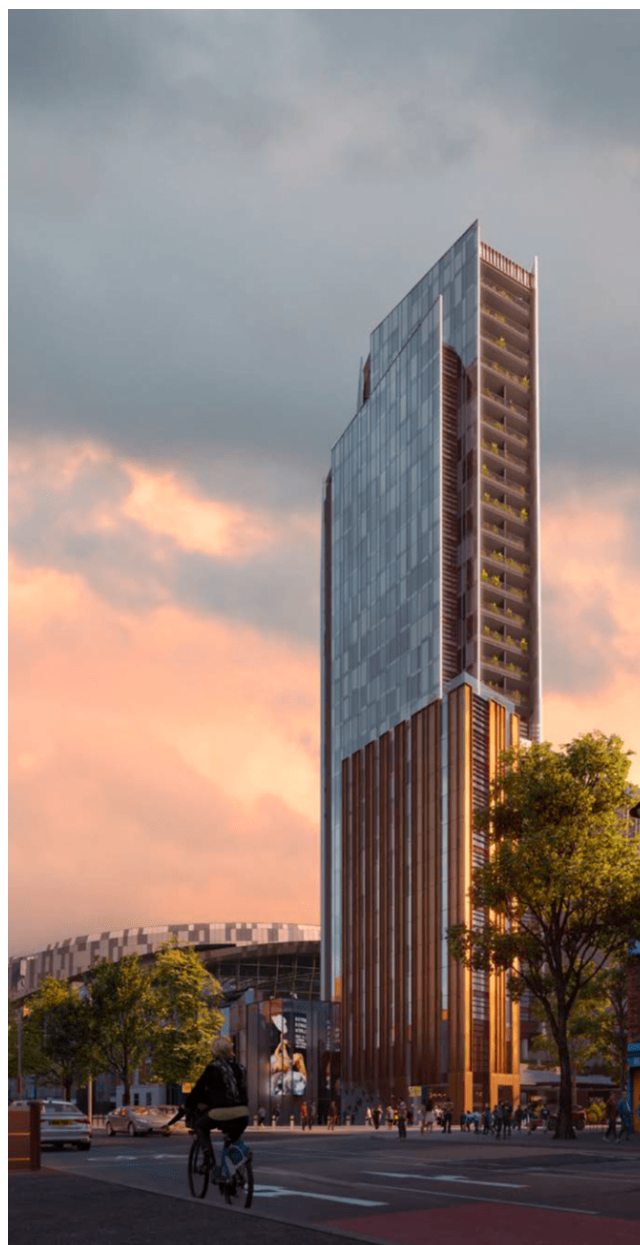
Providing a new purpose built high-quality student accommodation supported by commercial units and associated amenity spaces.

PAXTON17

The vision is for a vibrant commercial quarter where an infrastructure of restored and new buildings facilitates the development of a creative eco-system. PAXTON17 is already home to the Sarabande Foundation as well as F3 Architects, who were commissioned to design the internal spaces within Tottenham Hotspur Stadium. Future plans include the arrival of further arts and culture organisations building on Tottenham's reputation for producing some of the most prominent artists in the music industry today, fundamental to the London grime scene.

Hotel

The Club submitted a revised planning application in August 2023 for a circa. 180-room, 29-storey hotel, with 49 residential serviced apartments and 80 car park spaces.





Appendix

Study methodology

Economic impact

This report assesses the economic footprint of Tottenham Hotspur, based on the range of activities the Club undertakes. These activities include day-to-day commercial operations, matchday activities, hosting third-party events at Tottenham Hotspur Stadium,⁴⁹ and delivering community programmes. The impact of visitors attracted to the tri-borough area and their incremental spending is also captured in our analysis.

We have considered the economic impact of both 'onsite' and 'offsite' activity. Onsite activity comprises the expenditure of visitors across the Tottenham Hotspur Stadium campus, as well as the profits earned by the Club, whilst offsite activity relates to visitor expenditure outside the stadium with local businesses.⁵⁰ Across this activity, direct, indirect and induced impacts have been estimated. These impacts are described below.

Direct economic impacts

The direct impacts are based on information provided by Tottenham Hotspur and the NFL regarding operational costs, investment, tax liabilities, income, employment and event attendance. This information supports an assessment of the economic activity generated directly by Tottenham Hotspur. That is, the activity that results most immediately from Tottenham Hotspur's activities. This includes:

- ▶ Employment within Tottenham Hotspur, as measured by full time equivalents (FTEs).
- ▶ Gross Output of Tottenham Hotspur, measured based on revenue or turnover.
- ▶ GVA of Tottenham Hotspur, measured using the income approach (the sum of gross operating surplus, compensation of employees and net taxes on production).
- ▶ Tax revenue generated, including income tax and national insurance contributions.

Direct employment and GVA impacts are broken down by geography based on the primary location of the underpinning activity to provide impact estimates across the tri-borough area and London as a whole.

Indirect and induced impacts

The impact assessment includes not only the direct economic impact resulting from Tottenham Hotspur's activities, but also the economic activity stimulated through its supply chains (i.e., the indirect impacts) and additional activity supported by employment incomes and consumer spending (i.e., the induced impacts). This assessment is informed by a breakdown of Tottenham Hotspur's supply chain expenditure, which is categorised by major economic sector.

Indirect and induced impacts are estimated using EY's economic impact model, which estimates the GVA and employment 'effects' driven by direct sector spending. These effects show the further rounds of impact on the local or national economy for each £1 of supply chain expenditure.

The effects are driven by the structure of the local economy, including the extent to which the local economy relies upon imports from abroad and from elsewhere in the UK. This follows the input-output framework pioneered by Wassily Leontief and is based on national and local economic accounts.

Additionality

The economic footprint analysis presents a snapshot of Tottenham Hotspur's impact at a point in time. The analysis does not therefore seek to make adjustments or allowances for the additionality of impact, other than to attribute impacts to the geography within which they are expected to take place.

Future impacts

The future impact assessments in Section 5 of this report are calculated by applying EY's economic model to Tottenham Hotspur's forecast financials.

49. The direct impacts for visitor spending are based on: (1) event delivery (Stadium campus spend): for all events, revenue data provided by THFC; and (2) wider visitor expenditure, using third-party data. For concert impacts, EY analysed existing research on visitor spending from UK Music's flagship report, Music by Numbers 2020 and a third-party study for assessing the economic impact of concerts. For NFL and boxing impacts, EY analysed data from the ONS and VisitBritain on spending patterns of domestic and international tourists in the UK, to derive an estimated spending profile for visitors. EY verified and refined NFL inputs using data from the NFL. For operational event delivery, the costs incurred by THFC are included as part of the impacts.

50. EY analysed data from the ONS and VisitBritain on spending patterns of domestic and international tourists in the UK to derive an estimated spending profile for visitors.

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