TOWN BRIEFING: SOUTHALL

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Ealing
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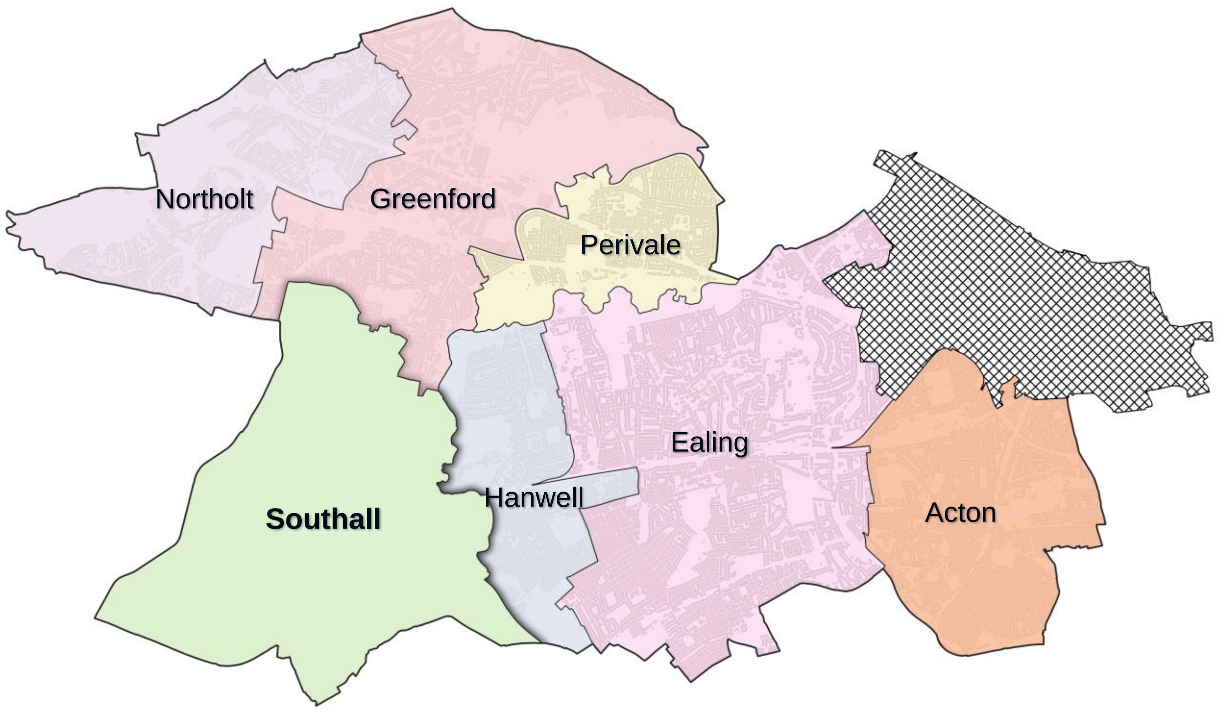
EALING'S SEVEN TOWNS

Ealing is home to seven towns. Each town has a strong local identity with its own unique character, needs and opportunities. The seven towns approach is integral to the council's strategy and is at the centre of Ealing's approach to the new Local Plan. The OPDC area is located in the north east of the borough, and contains a significant proportion of the borough's high-value economic activity. OPDC is a Mayoral Development Corporation and is responsible for overseeing one of Europe's largest regeneration programmes. This town briefing focuses on the Southall sub-area.



SOUTHALL TOWN BRIEFING

This Town Briefing provides high-level insight into the socio-economic character and performance of Southall. It sets out how London and Ealing's economy has changed, before outlining how these factors are shaping prosperity and opportunity in Southall. The Town Briefing is designed to inform local priorities - providing an evidence-led starting point for the Town Forums.

Ealing's Economic Context
Chapter 1 outlines how London's economy has changed over the last decade. It shows how Ealing's economy performs against the other 32 London boroughs, and evidences some of the key factors affecting prosperity in the borough.

Despite decades of growth, inequality and poverty across London and Ealing have increased. There is already significant work underway to support an economy which is fairer, greener, and more resilient.

The evidence included within the Town Briefing has been structured to align with the economic priorities set out within the Corporate Plan. This includes:

- **Jobs and Homes**
- **Environment and Economy**
- **Equality and People**

This chapter contains several key factors that will define prosperity at a borough and local level. This includes a summary of the action the council is already taking, and information about relevant economic strategies, projects, and plans.

Southall's Economic Profile
Chapter 2 provides high level intelligence showing how Southall performs against Ealing's other six towns, as well as the borough and London averages.

Economic evidence shows that Southall performs poorly against child poverty and health indicators. However, Southall performs strongly against economic growth and affordability measures.

Southall's Assets
Chapter 3 provides a review of the key assets that are important for local prosperity, vitality, and pride. This includes a review of major employers, public sector assets, cultural infrastructure, and the key developments planned for Southall.

Southall has a range of community, economic, and cultural assets which are integral to local prosperity.

Southall's challenges
Chapter 4 focuses on several key local challenges facing Southall's economy and residents. Using the data gathered in Chapters 1, 2, and 3 - and intelligence gathered from other evidence studies commissioned by the council – this outlines the key economic challenges facing the town.

Key challenges include place perception, poverty, and retaining Southall's identity in light of significant planned and future development

Southall's opportunities
Chapter 5 sets out three potential opportunities to explore within Southall over the next four years. Drawing on national and international case studies, this chapter presents the art of the possible and outlines potential priorities and areas of action which could be taken forward through the Town Forums.

There are key opportunities to explore to address local challenges including improving the town centre environment and creating good green jobs.

About this briefing:

This briefing has been compiled by PRD in partnership with Ealing Council. PRD are a place and economy consultancy and have recently been supporting the council to develop the evidence base to inform the Local Plan as part of the Industrious Ealing workstream.

The content of this briefing is not intended to be exhaustive. It has been designed to provide a snapshot of local economic performance to enable local leaders, residents, and businesses to identify shared priorities.

CHAPTER 1

EALING’S ECONOMIC CONTEXT

LONDON'S ECONOMIC EVOLUTION…

Despite a decade of economic growth, London's economy has become increasingly unequal. These long-term challenges have been brought to the fore by the COVID-19 pandemic and the cost of living crisis.

A DECADE OF GROWTH…

London's has grown significantly over the last ten years across a range of top level socio-economic measures.

London's population has grown by 12% and the number of businesses and jobs have increased significantly. Much of this has been high value economic activity, with the number of high value/knowledge-intensive businesses increasing by 72% since 2010.

BUT FOR MANY, WORK IS FAILING TO PAY AND INEQUALITY IS WIDENING…

Despite sustained economic growth, many Londoners are not sharing in the city's success.

27% of Londoners live in poverty (the highest poverty rate in the UK), with almost one in three workers earning an income below London Living Wage (GLA Datastore).

Between 2015 and 2019, the number of children in absolute low income households in London increased by 12%. This is all being driven by children living in working families – showing that employment is not always providing a reliable route out of poverty.

Currently, the ratio of income between the top 10% and bottom 10% of earners in London is around, 10:1, around double the rate of inequality in the rest of the county. This has not changed a great deal in the last decade, but the factors contributing to poverty and inequality have. This includes:

- **Feeling Well** - General feelings of wellbeing and life being worthwhile have not improved at the same rate as the rest of the country in the last decade
- **Disproportionality** – According to JRF, the poverty rate for BAME households in London is 38%. If you are from a non-white community you are more likely to experience poor mental and physical health, with younger people even more likely to be disproportionately impacted by poverty.
- **Housing Costs** – The average home in London costs around 13 times the average income, around double the rate in the North West or Midlands. Over 50% of Londoners live in rented accommodation and the market has returned quickly to its pre-pandemic rate.

THESE FRAGILITIES HAVE BEEN EXPOSED BY THE PANDEMIC…

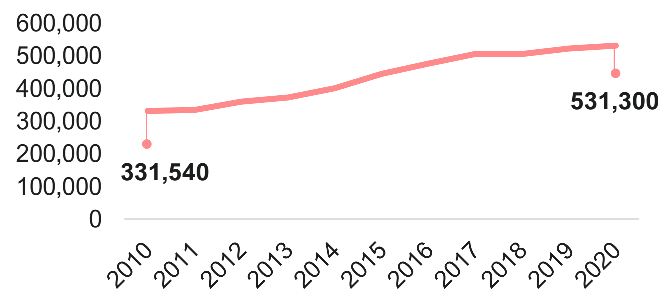
Long-term inequalities have been exposed and accentuated by the pandemic.

This is reinforced by the following indicators:

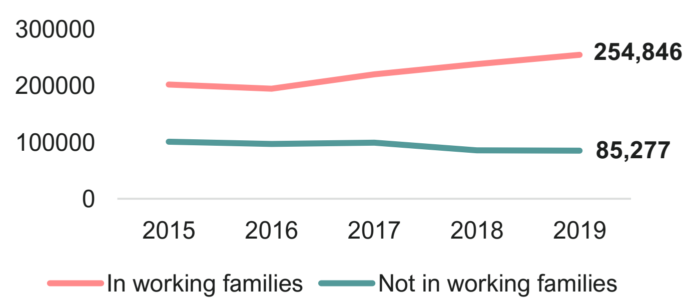
- **Food** – Between 2010 and 2020 number of Londoners relying on foodbanks has increased from around 12,000 to over 200,000; this has subsequently doubled to over 400,000 since the start of the pandemic (Statista)
- **Work Security** - London saw the biggest decline of PAYE employees of any region nationally and recovery took significantly longer. 1m Londoners were furloughed; In the boroughs with the highest rate - in Barnet, Brent, Hounslow, Newham and Redbridge, one in ten workers were still furloughed when the scheme ended

The economic resilience of Ealing's poorest households is likely to be further tested by the cost of living crisis – heightening the importance of targeted local action.

London business change, 2010-2020



Change in children in absolute low income households by parental work status in London, 2015-2019



Source: DWP StatXplore, ONS Business Counts

EALING'S PERFORMANCE IN LONDON: JOBS AND HOMES

	Employment growth 2015-19	Population growth % 2010-2020	Resident earnings	Number of jobs paying less than the London Living wage 2018	% of jobs in low paying sectors	3-year housing delivery	Housing affordability ratio	Knowledge economy employment change	% of employment in local services
1.	Hackney +21%	City of London +49%	Kensington and Chelsea £50,337	Westminster 76,000	City of London 17%	Tower Hamlets 9,344	Barking and Dagenham 10.17	Kensington and Chelsea 16%	Lewisham 61%
2.	City of London +19%	Tower Hamlets +34%	Wandsworth £43,651	Camden 40,000	Tower Hamlets 24%	Newham 8,080	Bexley 10.57	Newham 15%	Wandsworth 57%
3.	Newham +12%	Camden +30%	Islington £42,786	Hillingdon 39,000	Hounslow 26%	Brent 6,933	Havering 11.33	Hackney 12%	Greenwich 56%
4.	Barking and Dagenham +12%	Westminster +24%	Richmond upon Thames £42,151	Brent 35,000	Islington 27%	Barnet 6,559	Croydon 11.45	City of London 12%	Lambeth 56%
5.	Tower Hamlets +12%	Islington +24%	Westminster £41,977	Barnet 33,000	Southwark 28%	Southwark 5,789	Newham 11.90	Southwark 2%	Redbridge 56%
6.	Kensington and Chelsea +10%	Newham +19%	Bromley £41,170	**Ealing 31,000**	Westminster 30%	Greenwich 5,574	Tower Hamlets 11.97	Tower Hamlets 1%	Croydon 55%
7.	Southwark +10%	Barking and Dagenham +17%	Kingston upon Thames £40,572	Southwark 30,000	Barking and Dagenham 31%	Croydon 5,420	Sutton 12.12	Barking and Dagenham 0%	Barnet 54%
8.	Camden +10%	Hackney +16%	Tower Hamlets £40,533	City of London 29,000	Hackney 32%	**Ealing 5,359**	Bromley 12.14	Islington 0%	Kensington and Chelsea 54%
9.	Croydon +8%	Greenwich +16%	Lambeth £40,511	Bromley 29,000	Camden 33%	Wandsworth 4,943	Greenwich 12.36	Bromley -5%	Waltham Forest 54%
10.	Bexley +8%	Hillingdon +15%	Camden £39,994	Croydon 29,000	Bexley 33%	Hounslow 4,356	Enfield 12.93	Hammersmith and Fulham -5%	Kingston upon Thames 53%
11.	Greenwich +7%	Barnet +14%	Hammersmith and Fulham £39,430	Enfield 29,000	Harrow 35%	Lambeth 4,307	Hillingdon 13.11	Camden -6%	Haringey 53%
12.	Brent +7%	Kingston upon Thames +13%	Harrow £38,827	Hounslow 29,000	Bromley 35%	Redbridge 3,910	Redbridge 13.26	Lambeth -6%	Newham 52%
13.	Havering +5%	Southwark +13%	Southwark £38,030	Sutton 29,000	Richmond upon Thames 36%	Hammersmith and Fulham 3,616	Kingston upon Thames 13.43	Westminster -8%	Bromley 52%
14.	Westminster +5%	Lewisham +12%	Bexley £37,572	Tower Hamlets 29,000	Merton 37%	Lewisham 3,506	Lewisham 13.43	Haringey -10%	Havering 52%
15.	**Ealing +5%**	Redbridge +11%	Redbridge £37,118	Lambeth 28,000	Croydon 37%	Hillingdon 3,455	Lambeth 13.58	Havering -10%	Harrow 51%
16.	Islington +5%	Havering +10%	Sutton £36,459	Islington 26,000	Redbridge 38%	Harrow 3,328	Harrow 13.97	Lewisham -10%	Sutton 51%
17.	Waltham Forest +5%	Sutton +10%	Hackney £36,351	Havering 25,000	Hillingdon 38%	Hackney 3,301	Waltham Forest 14.06	Bexley -11%	Richmond upon Thames 51%
18.	Hillingdon +4%	Hounslow 9%	Croydon £36,347	Bexley 24,000	Barnet 38%	Haringey 2,902	Hounslow 14.45	Waltham Forest -13%	Enfield 50%
19.	Wandsworth +4%	Waltham Forest +9%	Waltham Forest £36,096	Hammersmith and Fulham 23,000	Newham 39%	Waltham Forest 2,787	Southwark 14.59	Greenwich -14%	Brent 46%
20.	Redbridge +3%	Wandsworth +9%	Haringey £35,963	Kingston upon Thames 23,000	Hammersmith and Fulham 39%	Barking and Dagenham 2,695	Islington 14.68	Redbridge -14%	Hackney 46%
21.	Bromley +3%	Croydon +9%	Havering £35,885	Merton 23,000	Sutton 39%	Islington 2,600	Wandsworth 14.89	Hillingdon -15%	Bexley 45%
22.	Enfield +2%	Enfield +8%	Barnet £35,716	Newham 23,000	**Ealing 40%**	Westminster 2,524	Hackney 15.41	Barnet -15%	Hammersmith and Fulham 44%
23.	Sutton +2%	Lambeth +8%	Hillingdon £35,695	Wandsworth 23,000	Greenwich 41%	Camden 2,202	Haringey 15.57	Wandsworth -15%	Westminster 42%
24.	Merton +2%	Bexley +8%	Greenwich £35,598	Harrow 20,000	Haringey 41%	Richmond upon Thames 2,019	**Ealing 15.79**	**Ealing -16%**	Barking and Dagenham 41%
25.	Richmond upon Thames +2%	Bromley +8%	Enfield £35,586	Kensington and Chelsea 20,000	Lewisham 42%	Enfield 1,777	Merton 15.97	Merton -18%	**Ealing 41%**
26.	Hounslow +1%	Brent +8%	Lewisham £35,365	Hackney 19,000	Havering 42%	Kingston upon Thames 1,598	Brent 16.27	Richmond upon Thames -18%	Merton 40%
27.	Hammersmith and Fulham +1%	Richmond upon Thames +6%	Newham £34,869	Redbridge 18,000	Lambeth 43%	Bromley 1,477	Richmond upon Thames 16.61	Croydon -19%	Camden 36%
28.	Barnet +0%	Harrow +6%	**Ealing £34,190**	Waltham Forest 18,000	Enfield 43%	Havering 1,474	Barnet 16.80	Brent -21%	Southwark 36%
29.	Harrow +0%	Haringey +5%	Merton £34,127	Greenwich 17,000	Waltham Forest 44%	Sutton 1,442	Hammersmith and Fulham 19.02	Harrow -22%	Hillingdon 33%
30.	Lewisham -1%	Merton +4%	Brent £33,805	Haringey 16,000	Kingston upon Thames 45%	Bexley 1,377	Camden 19.08	Enfield -23%	Islington 30%
31.	Haringey -1%	**Ealing +2%**	Barking and Dagenham £32,931	Richmond upon Thames 15,000	Brent 45%	Merton 1,239	Westminster 20.25	Sutton -23%	Tower Hamlets 29%
32.	Lambeth -3%	Hammersmith and Fulham +1%	Hounslow £32,516	Lewisham 14,000	Wandsworth 46%	City of London 854	Kensington and Chelsea 24.83	Hounslow -24%	Hounslow 29%
33.	Kingston upon Thames -5%	Kensington and Chelsea -2%		Barking and Dagenham 13,000	Kensington and Chelsea 47%	Kensington and Chelsea 809		Kingston upon Thames -28%	City of London 10%

Sources: ONS BRES, Mid Year Population Estimates, ASHE, GLA Datastore, DLUCH

EALING'S PERFORMANCE IN LONDON: ENVIRONMENT AND ECONOMY

	Business change		Knowledge economy business change		% of population in areas where NO2 is > 40µg/m2 (2016)		CO2 Emissions (kt)		% of jobs in carbon intensive industries		% of adults who walk or cycle for any purpose at least once per week (2018-19)		Median Domestic Electricity Consumption (kWh/meter)		Median Domestic Gas Consumption (kWh/meter)		Population Density (people per hectare)	
1.	Hackney	23%	Hackney	19%	Barking & Dagenham	0.0%	Barking and Dagenham	527	City of London	7%	Richmond upon Thames	85%	Bromley	3,064	Harrow	16,343	Islington	138.7
2.	Islington	16%	Islington	9%	Bexley	0.0%	Kingston	539	Tower Hamlets	10%	Lambeth	82%	Havering	3,059	Barnet	14,957	Kensington and Chelsea	130.9
3.	Camden	16%	Camden	8%	Bromley	0.0%	Harrow	604	Islington	13%	Hackney	80%	Bexley	3,056	Redbridge	14,549	Hackney	129.3
4.	Barking and Dagenham	15%	Westminster	7%	Croydon	0.0%	Hackney	606	Southwark	13%	Southwark	80%	Kingston upon Thames	3,036	Bromley	14,439	Tower Hamlets	128.5
5.	Enfield	12%	Kensington and Chelsea	4%	Harrow	0.0%	Merton	617	Camden	13%	Hammersmith and Fulham	79%	Redbridge	3,028	Hillingdon	13,783	Lambeth	113.1
6.	Waltham Forest	12%	Waltham Forest	0%	Havering	0.0%	Haringey	637	Westminster	14%	Kensington and Chelsea	79%	Richmond upon Thames	3,018	Brent	13,613	Hammersmith and Fulham	111.3
7.	Barnet	12%	Sutton	0%	Hillingdon	0.0%	Waltham Forest	640	Kensington and Chelsea	15%	City of London	78%	Hillingdon	2,985	Enfield	13,610	Westminster	102.1
8.	Hillingdon	9%	Haringey	-1%	Kingston upon Thames	0.0%	Hammersmith and Fulham	649	Hackney	15%	Wandsworth	78%	Sutton	2,967	Kingston upon Thames	13,515	Camden	101.1
9.	Westminster	9%	Harrow	-1%	Lewisham	0.0%	Richmond	657	Lambeth	17%	Kingston upon Thames	76%	Barnet	2,929	Croydon	13,450	Southwark	99.9
10.	Harrow	9%	Barnet	-2%	Merton	0.0%	Islington	674	Richmond upon Thames	17%	Islington	76%	Enfield	2,920	Richmond upon Thames	13,446	Wandsworth	89.6
11.	Brent	8%	Southwark	-2%	Richmond upon Thames	0.0%	Redbridge	740	Kingston upon Thames	18%	Camden	74%	Harrow	2,915	Bexley	13,394	Haringey	86.1
12.	Redbridge	8%	Hillingdon	-2%	Sutton	0.0%	City of London	753	Lewisham	19%	Lewisham	73%	Croydon	2,853	Havering	13,387	Newham	85.1
13.	Newham	7%	Richmond upon Thames	-3%	Waltham Forest	0.1%	Kensington and Chelsea	761	Hammersmith and Fulham	19%	Bromley	72%	Merton	2,828	Sutton	13,175	Lewisham	78.5
14.	Havering	7%	Enfield	-3%	Enfield	0.1%	Greenwich	773	Croydon	19%	Haringey	72%	Hounslow	2,819	**Ealing**	**12,884**	Brent	72.0
15.	Kingston upon Thames	7%	Lewisham	-4%	Haringey	0.1%	Lewisham	814	Wandsworth	20%	Westminster	69%	Barking and Dagenham	2,709	Hounslow	12,795	Waltham Forest	66.5
16.	Haringey	6%	Bromley	-5%	Greenwich	0.2%	Lambeth	828	Bromley	20%	Tower Hamlets	69%	City of London	2,653	Merton	12,722	**Ealing**	**60.9**
17.	Sutton	4%	Havering	-6%	Wandsworth	0.2%	Wandsworth	833	Barnet	21%	Greenwich	69%	**Ealing**	**2,652**	Waltham Forest	12,133	Greenwich	53.8
18.	Kensington and Chelsea	4%	Croydon	-6%	**Ealing**	**0.4%**	Havering	907	Newham	21%	Merton	68%	Waltham Forest	2,613	Haringey	11,546	Merton	53.1
19.	Greenwich	3%	Brent	-6%	Barnet	0.5%	Brent	930	Redbridge	21%	Barnet	67%	Brent	2,564	Greenwich	11,467	Barking and Dagenham	51.5
20.	Croydon	3%	Greenwich	-6%	Brent	0.6%	Southwark	956	Hillingdon	21%	Sutton	67%	Greenwich	2,552	Barking and Dagenham	11,337	Redbridge	49.5
21.	Southwark	2%	Hammersmith and Fulham	-7%	Redbridge	0.6%	Bromley	971	Hounslow	21%	Waltham Forest	65%	Lewisham	2,512	Lewisham	11,110	Harrow	47.4
22.	**Ealing**	**2%**	Barking and Dagenham	-8%	Hounslow	1.2%	Sutton	1,003	Harrow	22%	Enfield	65%	Newham	2,497	Newham	11,039	Hounslow	45.4
23.	Lewisham	2%	Kingston upon Thames	-8%	Hackney	1.2%	Croydon	1,027	Sutton	22%	Brent	65%	Haringey	2,448	Wandsworth	10,935	Sutton	43.4
24.	Bexley	2%	Hounslow	-8%	Newham	1.3%	Camden	1,060	Greenwich	23%	Hillingdon	64%	Wandsworth	2,447	Lambeth	10,097	Kingston upon Thames	43.0
25.	Hounslow	1%	Tower Hamlets	-9%	Lambeth	2.4%	**Ealing**	**1,109**	Waltham Forest	24%	Croydon	64%	Southwark	2,323	Hammersmith and Fulham	9,925	Croydon	42.0
26.	Richmond upon Thames	1%	**Ealing**	**-9%**	Southwark	2.4%	Tower Hamlets	1,137	**Ealing**	**24%**	Havering	63%	Lambeth	2,316	Kensington and Chelsea	9,640	Barnet	41.1
27.	Tower Hamlets	0%	Redbridge	-9%	Hammersmith & Fulham	3.0%	Hounslow	1,163	Enfield	26%	**Ealing**	**62%**	Hammersmith and Fulham	2,307	Camden	9,635	Enfield	38.7
28.	Merton	0%	Wandsworth	-10%	Islington	3.1%	Bexley	1,168	Merton	26%	Redbridge	60%	Hackney	2,304	Hackney	9,275	Bexley	38.3
29.	Bromley	0%	Bexley	-10%	Tower Hamlets	7.5%	Newham	1,197	Haringey	27%	Hounslow	60%	Kensington and Chelsea	2,303	Southwark	8,972	Richmond upon Thames	32.6
30.	Hammersmith and Fulham	-3%	Merton	-10%	Kensington & Chelsea	9.6%	Barnet	1,197	Havering	27%	Barking and Dagenham	58%	Tower Hamlets	2,248	Islington	8,809	City of London	25.5
31.	Wandsworth	-5%	City of London	-15%	Camden	11.1%	Enfield	1,269	Bexley	28%	Harrow	58%	Westminster	2,205	Westminster	8,627	Hillingdon	23.7
32.	Lambeth	-5%	Lambeth	-16%	Westminster	21.1%	Westminster	1,863	Brent	29%	Bexley	58%	Camden	2,194	Tower Hamlets	8,286	Havering	21.1
33.	City of London	-9%	Newham	-21%	City of London	34.5%	Hillingdon	2,319	Barking and Dagenham	29%	Newham	57%	Islington	2,169	City of London	7,007	Bromley	20.6

Sources: ONS Business Counts, London Datastore

EALING'S PERFORMANCE IN LONDON: EQUALITY AND PEOPLE

	Life satisfaction (2021)	Number of children living in absolute poverty (2021)	Number of residents on furlough- (October 21)	% of residents with NVQ Level 4+	Average Attainment 8 score out of 90 (2019/20)	16-17 year olds who are NEET	Adults classified as overweight or obese (18+)	Life expectancy (Male)	Life expectancy (Female)
1.	Hounslow 7.55	City of London 66	Kensington and Chelsea (18,500)	City of London 100%	Sutton 62	City of London 0.6%	Hillingdon 67.2%	Westminster 83.9	Camden 87.0
2.	Havering 7.54	Kensington and Chelsea 2,134	Richmond upon Thames (27,900)	Wandsworth 73%	Kingston upon Thames 61.4	Hammersmith and Fulham 1.4%	Bexley 66.1%	Kensington and Chelsea 83.3	Kensington and Chelsea 86.8
3.	Bexley 7.53	Richmond upon Thames 2,747	Kingston upon Thames (28,600)	Lewisham 70%	Barnet 60.8	Barnet 1.7%	Bromley 65.0%	Harrow 83.3	Westminster 86.5
4.	Newham 7.51	Kingston upon Thames 3,344	Camden (32,400)	Lambeth 69%	Hammersmith and Fulham 58.1	Bromley 2.0%	Greenwich 64.4%	Camden 82.7	Richmond upon Thames 86.4
5.	Croydon 7.51	Hammersmith and Fulham 4,383	Sutton (32,500)	Kensington and Chelsea 67%	Richmond upon Thames 58.1	Kingston upon Thames 2.4%	Enfield 64.2%	Richmond upon Thames 82.5	Harrow 86.0
6.	Hammersmith and Fulham 7.49	Westminster 4,476	Westminster and City of London (33,600)	Richmond upon Thames 66%	Kensington and Chelsea 57.9	Merton 2.5%	Barking and Dagenham 63.5%	Barnet 82.4	Barnet 85.8
7.	Bromley 7.49	Sutton 5,416	Hammersmith and Fulham (34,700)	Southwark 66%	Westminster 57.6	Harrow 2.6%	Havering 63.3%	Kingston upon Thames 81.5	Brent 85.1
8.	Redbridge 7.41	Merton 6,623	Islington (36,200)	Westminster 65%	Redbridge 56.8	**Ealing 2.7%**	Hounslow 62.8%	Redbridge 81.5	Bromley 85.0
9.	Richmond upon Thames 7.41	Islington 6,785	Merton (38,500)	Camden 65%	Bromley 55.2	Hillingdon 2.8%	Sutton 62.5%	Bromley 81.3	Haringey 85.0
10.	Harrow 7.37	Camden 7,176	Bexley (39,600)	Hammersmith and Fulham 65%	Southwark 55	Richmond upon Thames 3.0%	Croydon 62.1%	Merton 81.0	Kingston upon Thames 84.9
11.	Sutton 7.36	Wandsworth 7,201	Barking and Dagenham (40,100)	Haringey 65%	Harrow 54.8	Brent 3.1%	City of London 61.9%	Brent 80.8	**Ealing 84.8**
12.	Barking and Dagenham 7.35	Bromley 7,645	Havering (43,100)	Greenwich 62%	Newham 54.5	Waltham Forest 3.1%	Lewisham 61.2%	Haringey 80.8	Redbridge 84.8
13.	Wandsworth 7.34	Bexley 7,738	Harrow (45,200)	Barnet 62%	Bexley 54	Camden 3.2%	Harrow 59.0%	**Ealing 80.8**	Enfield 84.8
14.	Merton 7.33	Havering 8,811	Greenwich (49,900)	Kingston upon Thames 61%	Hackney 54	Sutton 3.2%	Haringey 59.0%	Enfield 80.6	Southwark 84.6
15.	Kensington and Chelsea 7.31	Harrow 9,494	Bromley (51,500)	Islington 61%	Hounslow 53.9	Bexley 3.3%	Merton 58.3%	Waltham Forest 80.6	Hammersmith and Fulham 84.6
16.	Barnet 7.30	Haringey 9,769	Hackney (52,300)	**Ealing 61%**	Brent 53.7	Hounslow 3.5%	**Ealing 57.3%**	Sutton 80.6	Waltham Forest 84.5
17.	Waltham Forest 7.30	Lambeth 10,481	Redbridge (54,700)	Hackney 61%	**Ealing 53.6**	Redbridge 3.5%	Newham 56.8%	Wandsworth 80.5	Merton 84.3
18.	Lambeth 7.28	Southwark 10,810	Lewisham (57,000)	Merton 60%	Merton 53.2	Westminster 3.6%	Southwark 56.3%	Hillingdon 80.4	Bexley 84.1
19.	Brent 7.25	Barnet 10,942	Wandsworth (57,200)	Newham 60%	Camden 53.1	Barking and Dagenham 3.7%	Barnet 55.6%	Croydon 80.3	Hillingdon 84.0
20.	Kingston upon Thames 7.23	Hounslow 11,159	Tower Hamlets (58,200)	Harrow 60%	Hillingdon 52.8	Havering 3.8%	Redbridge 55.4%	Newham 80.2	Wandsworth 84.0
21.	Greenwich 7.22	Lewisham 11,240	Waltham Forest (58,600)	Tower Hamlets 59%	Havering 52.2	Enfield 4.6%	Kingston upon Thames 55.1%	Bexley 80.1	Havering 84.0
22.	Westminster 7.21	Hillingdon 11,478	Hillingdon (60,200)	Waltham Forest 57%	Islington 52.2	Islington 4.8%	Waltham Forest 54.6%	Hounslow 80.0	Croydon 84.0
23.	**Ealing 7.21**	Enfield 12,589	Enfield (61,600)	Sutton 55%	Wandsworth 52.2	Greenwich 4.8%	Brent 54.3%	Hammersmith and Fulham 79.7	Sutton 83.9
24.	Haringey 7.17	Greenwich 12,757	Southwark (62,200)	Hillingdon 55%	Tower Hamlets 51.7	Hackney 4.8%	Islington 53.6%	Havering 79.7	Lewisham 83.8
25.	Southwark 7.17	Hackney 13,035	Haringey (62,500)	Redbridge 53%	Waltham Forest 51.5	Tower Hamlets 5.0%	Westminster 52.6%	Islington 79.6	Hounslow 83.8
26.	Tower Hamlets 7.13	Redbridge 13,365	Hounslow (65,800)	Bromley 53%	Haringey 51.4	Newham 5.1%	Wandsworth 52.2%	Hackney 79.6	Lambeth 83.7
27.	Hillingdon 7.10	**Ealing 13,422**	Lambeth (66,800)	Hounslow 52%	Lambeth 51.3	Kensington and Chelsea 5.4%	Lambeth 51.8%	Greenwich 79.5	Hackney 83.7
28.	Lewisham 7.09	Croydon 13,771	Croydon (67,200)	Brent 50%	Greenwich 51.2	Croydon 5.4%	Camden 50.1%	Tower Hamlets 79.3	Newham 83.3
29.	Islington 6.99	Brent 13,960	Barnet (71,200)	Croydon 49%	Enfield 51.1	Lambeth 5.7%	Hammersmith and Fulham 49.7%	Southwark 79.3	Islington 83.3
30.	Hackney 6.94	Waltham Forest 14,067	Brent (73,600)	Enfield 46%	Barking and Dagenham 50.5	Southwark 6.1%	Hackney 48.7%	Lewisham 79.2	Tower Hamlets 83.2
31.	Enfield 6.86	Barking and Dagenham 15,232	**Ealing (75,000)**	Barking and Dagenham 45%	Croydon 50	Lewisham 6.2%	Richmond upon Thames 47.6%	Lambeth 79.2	Greenwich 83.0
32.	Camden 6.78	Tower Hamlets 18,439	Newham (81,100)	Havering 41%	Lewisham 49.1	Wandsworth 6.5%	Tower Hamlets 47.2%	Barking and Dagenham 78.0	Barking and Dagenham 82.7
33.		Newham 21,060		Bexley 38%		Haringey 7.9%	Kensington and Chelsea 45.9%		

Sources: ONS 4 Survey, DWP StatXplore, APS, HMT, DfE, PHE

Ealing
www.ealing.gov.uk

FACTORS SHAPING PROSPERITY: HOUSING AFFORDABILITY

WHAT THE DATA SHOWS…

Housing affordability is an economic issue and is the primary determinant of deprivation in the borough.

Housing in Ealing has been consistently more unaffordable than the London average for the last two decades. In 2021, the average house price in Ealing was almost 16 times average earnings, compared to 14 times in London as a whole.

Affordability challenges are most acute in the borough's metropolitan core – specifically the towns of Ealing, Acton, and Hanwell.

Housing affordability is the primary driver of deprivation across Ealing. 71% of neighbourhoods across the borough fall within the top 20% most deprived nationally for the barriers to housing and services sub domain (Indices of Multiple Deprivation, 2019).

THIS IS RESULTING IN…

Despite significant housing development, Ealing's population has stagnated. Ealing has an ageing population and there is a risk that housing affordability challenges will affect wider economic prosperity.

Despite over 5,000 new homes being delivered in Ealing since 2017 (Housing Delivery Test), Ealing's population has only grown by 2% over the last ten years, and has even decreased in parts of the borough. This runs against the London average, with the population of the city growing by 9% over the same period.

There is evidence to suggest that this is being driven by housing unaffordability. Since 2011, Ealing has had a net outflow of 57,000 residents - with the highest outflows to more affordable adjacent boroughs such as Hillingdon and Hounslow. Whilst the population has been sustained by international migration, there is evidence to suggest that this has been significantly reduced by Brexit and COVID-19 in the short-term (Industrious Ealing).

Ealing's population already has a higher average median age than the London average. Therefore, an ageing, stagnating population could affect local place vitality, as well as future council service provision and delivery – making housing affordability a key economic issue.

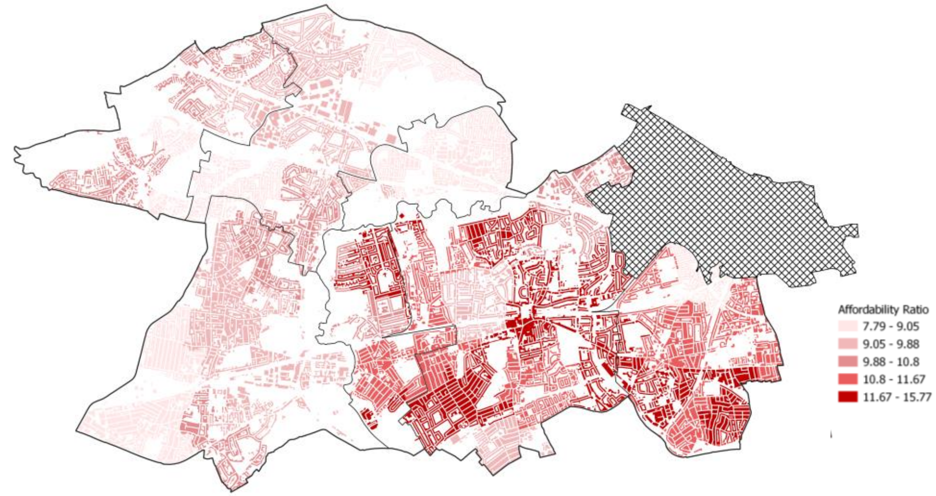
WHAT THE COUNCIL IS ALREADY DOING…

Since 2017 over 2,500 genuinely affordable homes have been delivered for Ealing's residents. Broadway Living has been set up as the council's housing company to directly deliver homes.

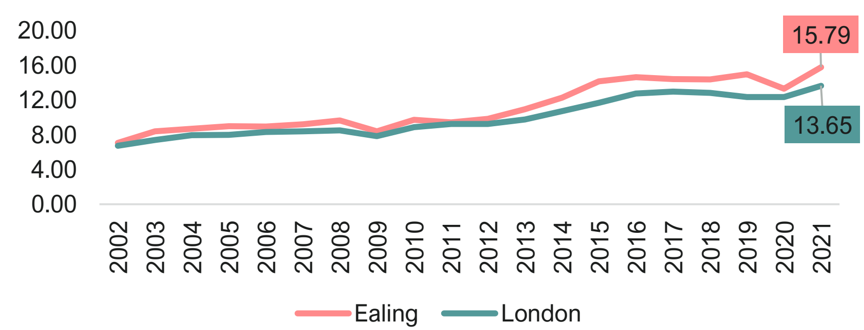
Broadway Living plays an important role in addressing Ealing's housing affordability challenges.

Since 2017 over 2,500 genuinely affordable homes have been delivered for Ealing's residents. Broadway Living has been set up as the council's housing company to directly deliver homes.

Housing affordability Ratio, 2018



Housing affordability Ratio, 2002-2021



Source: ASHE, ONS

FACTORS SHAPING PROSPERITY: QUALITY OF WORK

WHAT THE DATA SHOWS...

Ealing hosts high quantities of low paying employment. The borough has also seen a sharp decline in higher value 'knowledge intensive' jobs in recent years.

Ealing hosts the sixth highest number of jobs (31,000) paying less than the London Living Wage (as set by the Living Wage Foundation).

The 2021 Low Pay Commission Report helps to understand the spatial distribution of low pay in the borough. This defines low paying sectors as: *"industries which contain a high number or large proportion of low-paid workers based on the Standard Occupation Classification (SOC) and Standard Industrial Classification (SIC) codes published by ONS."* Lowest paying industries in London include Accommodation and Food (£16,303) and Wholesale and Retail (£22,974).

40% of Ealing's jobs are in typically low paying industries compared to the London average (33%).

Ealing has also seen a reduction in higher value employment. Between 2019-2020, the number of knowledge intensive jobs in the borough fell by 8%, compared to a 4% growth in London as a whole.

THIS IS BEING IMPACTED BY...

The COVID-19 pandemic has exposed challenges around the quality of work and Ealing has been acutely affected.

Insecure and low quality work has meant that Ealing's economic exposure was high going into the pandemic. At the end of the furlough scheme, Ealing had the second highest number of residents on furlough of anywhere in London (75,000).

Since the start of the pandemic, an additional 5,500 residents have become unemployed – the fourth highest in London. The council has an important role to play in both job brokerage, and encouraging good work across the borough.

WHAT THE COUNCIL IS ALREADY DOING...

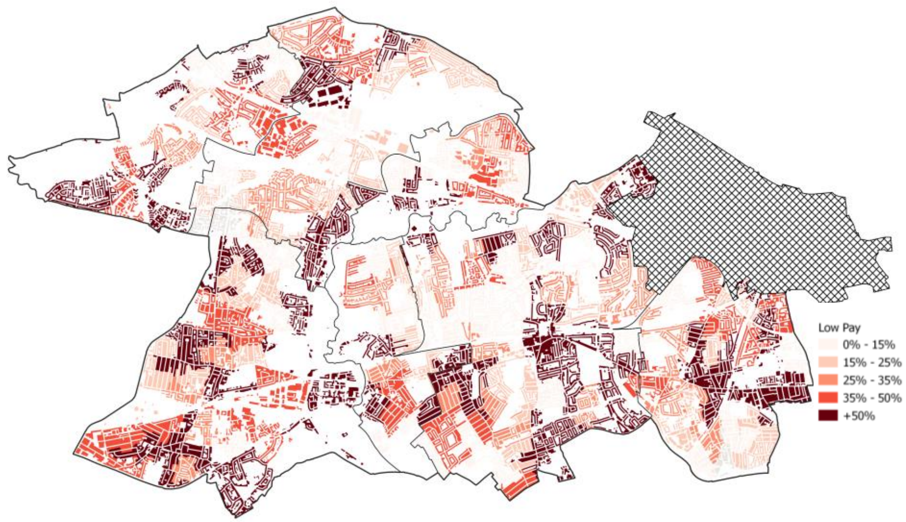
Ealing Council have supported residents and businesses throughout the pandemic. The council will now begin its long-term planning in relation to the economy.

At the start of the pandemic, the council launched its 'Ealing Together' initiative, which inspired over 1,000 local volunteers to be registered and helped the council deliver 14,000 food parcels to shielded and most vulnerable residents. Between April and September 2020, the Council also allocated nearly £78M in grants to 5,672 small and medium businesses to give them the best chance of surviving the initial lockdown.

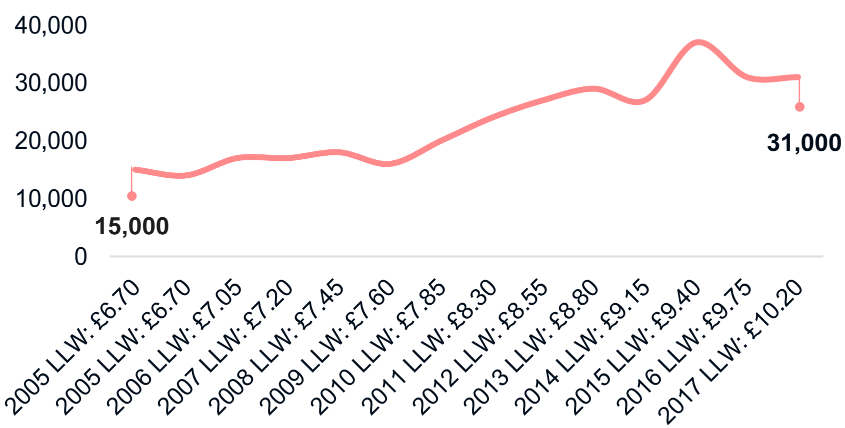
The Council's Plan for Good Jobs (see page 12) includes ongoing economic priorities for the next 12 months.

The Council also intends to develop an Inclusive Economy strategy to guide a long-term strategic approach to engagement with the economy, and address these fundamental, long-term challenges.

% of jobs in typically low paying sectors



Number of jobs in Ealing paying less than the London Living Wage, 2006-2018



Source: DWP StatXplore

FACTORS SHAPING PROSPERITY: POVERTY

WHAT THE DATA SHOWS…

There is evidence to suggest that the amount of poor quality work is contributing to challenges of low earnings, deprivation, and in-work poverty.

Across a range of traditional economic measures, Ealing would be perceived to be performing well. For example, economic activity is high. 81.4% of residents are economically active compared to 79.3% in London as a whole. More people are now in work than ten years ago – but there is evidence that this is not always providing a reliable route out of poverty.

Resident earnings in Ealing are low and the borough has the fifth lowest median earnings in London. On average, residents are earning 9% less than the London average.

However, this varies significantly across the borough. There is an East/West poverty divide with high concentrations of low income households in the West of the borough. This challenges is most acute in Southall and Northolt.

This is evidenced by the fact that in-work poverty is on the rise. Over the last few years, the borough has experienced an increase in children living in absolute low income households. An individual is in absolute low income (or absolute poverty) if they are living in households with income below 60% of the 2010/11 median, uprated for inflation. By using an income threshold that is fixed in time, this measure looks at how living standards of low-income households are changing over time (House of Commons Library).

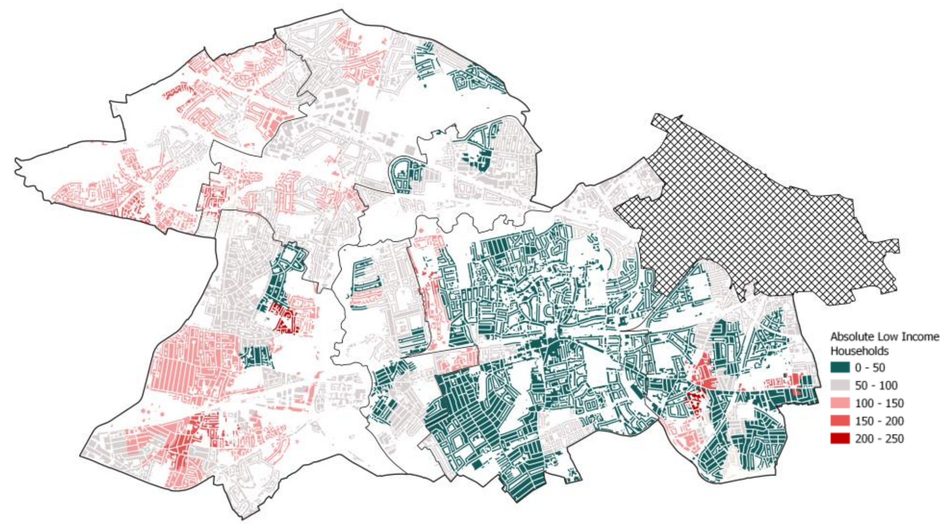
Low earnings, high housing costs, and poor quality work will all affect the economic resilience of households in the short-term as the cost of living crisis continues to bite.

WHAT THE COUNCIL IS ALREADY DOING…

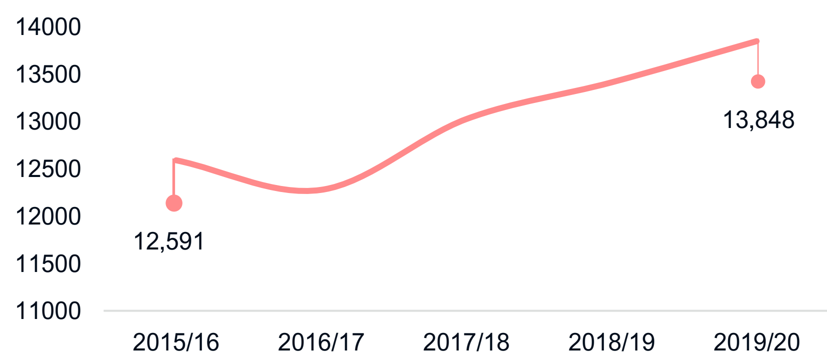
Ealing council is already providing significant additional help to support for residents on low incomes. This includes:

- **Local Welfare Assistance scheme**: Local welfare assistance is a discretionary support scheme. The fund is there to help people to try to maintain an independent life or for those facing an immediate financial crisis. Ealing residents could be eligible for extra financial support over winter through this scheme. Residents who have unsuccessfully applied before may be able to receive help under the new rules.
- **Council tax support scheme**: Our council tax support scheme provides up to 100% discount on bills to the most vulnerable. Around 16,500 working age Ealing residents, and 7,400 pensioners, currently receive help paying their council tax through this scheme. That's around one out of every six households.
- **Free school meals:** Families will children who receive certain benefits, or who have no recourse to public funds, are strongly encouraged to apply for free school meals.

Number of children living in absolute low income households, 2019/20



Change in children in absolute low income households, 2015-2020



Source: DWP StatXplore

FACTORS SHAPING PROSPERITY: EALING'S GROWTH OPPORTUNITY

WHAT THE DATA SHOWS…

Despite the challenges facing the borough, Ealing has an unprecedented opportunity for growth. Ealing Council can play an important role in curating this demand to help address deeply embedded challenges.

Ealing's economic growth opportunity is centred on its industrial land.

Between 2010 and 2015, London released three times more than the recommended amount industrial land - losing around 23% of its industrial land since 2000. The release of industrial land in Ealing has been far less severe and Ealing has only lost 8% of its industrial land supply. Ealing now contains 8% city's industrial land (We Made That) – making it integral to the functioning of London's economy.

Ealing's vacancy rate is extremely low (3%). Typically, anything under a 5% vacancy rate leads to market compression and excessive rent rises. This is shown through industrial rents in the borough which have grown by 94% since 2009. This also shows that the market is undersupplied (Iceni) and would be quickly absorbed if new space became available.

The borough therefore has an important role as curators of this demand to ensure that this unprecedented opportunity maximises benefits for Ealing's residents.

The evidence shows that Ealing's industrial areas have been the primary drivers of growth. The map (right) shows that the borough's designated industrial areas have delivered the biggest employment growth for Ealing since 2016. The biggest job growth has been in Strategic Industrial Land (SIL) in Greenford and Perivale, and Locally Significant Industrial Sites (LSIS) in Southall.

WHAT THE COUNCIL IS ALREADY DOING…

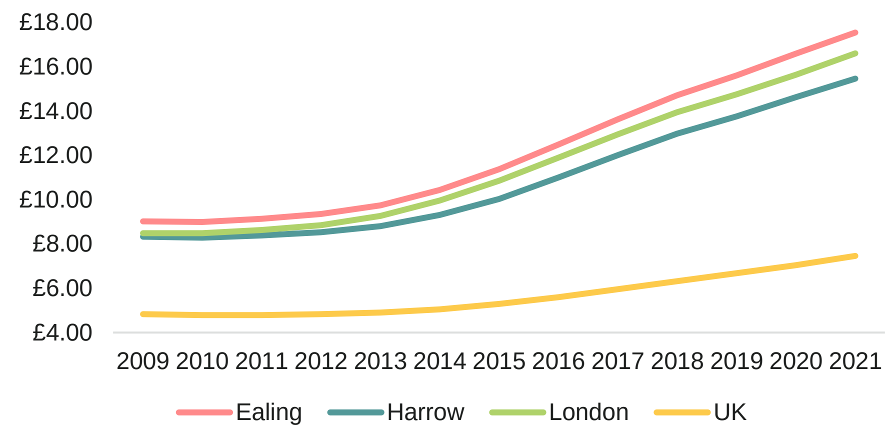
Industrious Ealing will provide the council with the evidence base to proactively shape demand to maximise benefits for its residents.

Industrious Ealing will provide a detailed evidence base to define industrial priorities. This will understand the opportunities to: retain, create, and intensify industrial land supply through planning policy.

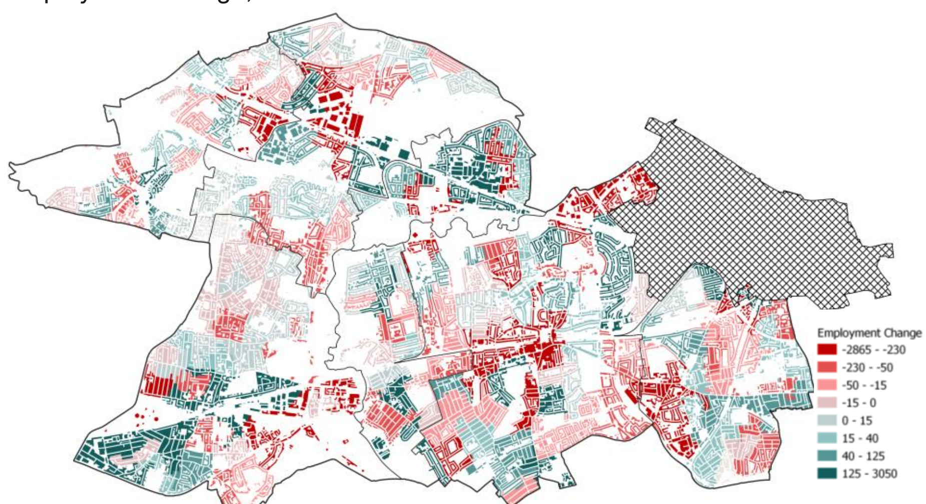
It will also outline the wider levers that the council could consider to maximise Ealing's industrial growth opportunity such as:

- Industrial intensification: understanding the potential to increase employment densities on industrial sites to create more jobs and make the best use of space.
- Co-location: where sensible and viable, exploring where residential and industrial uses can be located in close proximity to create thriving, mixed-use neighbourhoods.
- Growing and greening existing sectors: understanding how the green and low carbon economy can be supported to grow in industrial areas to accelerate the transition to net zero and create good new jobs.

Average industrial rents per sqft, 2009-2021



Employment change, 2016-2020



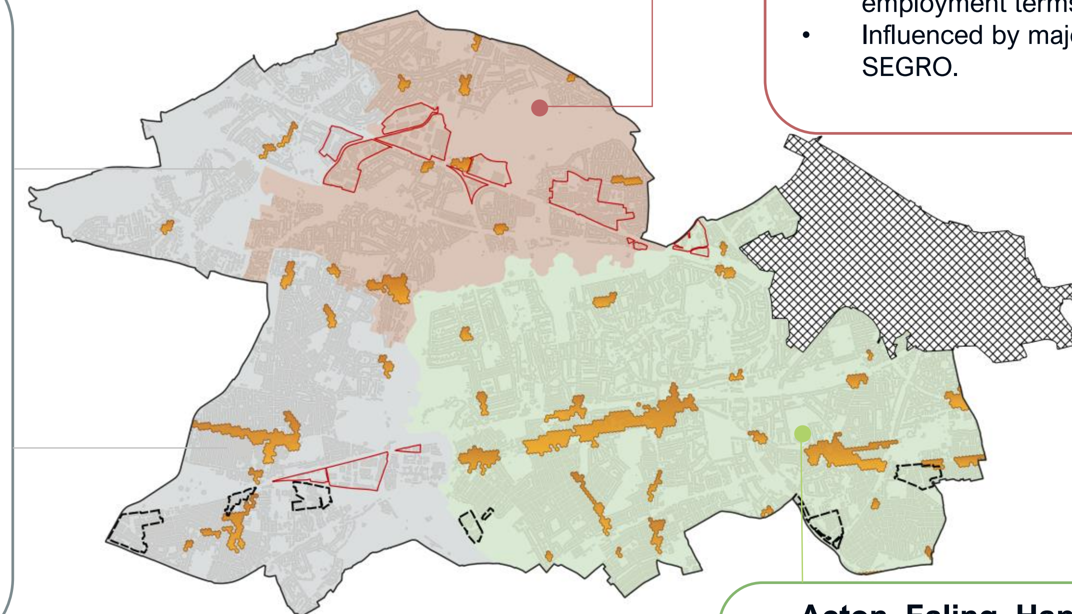
Source: ONS BRES, Business Counts, CoStar – Iceni Employment Land Review

RESPONDING TO THE EVIDENCE: EALING'S THREE ECONOMIES

Socio-economic indicators show that Ealing's seven towns can be simplified into three economic geographies, each with their own specific strengths, weaknesses, opportunities and priorities for action. Greenford's economy is intrinsically linked to Perivale and the two sub areas share economic specialisms, identities, and potential for growth.

Southall & Northolt

- Where challenges of deprivation, low pay, and poverty are most acute.
- Strong foundational economies which provides significant amounts of local employment.
- Acutely affected by the pandemic and are more reliant on supply chain linkages to Heathrow.
- Significant public sector assets can provide increased influence and scope to enact change/embed political ambition.



Greenford & Perivale

- Smaller town centres where industrial areas are the primary economic driver.
- Hosts the borough's largest employers in employment terms.
- Influenced by major land owners such as SEGRO.

Acton, Ealing, Hanwell

- Connected by the Uxbridge Road
- Hosting the borough's 'high value' employment
- Larger high street centres which are key economic hubs
- Where affordability challenges for residents and businesses are most acute.

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RESPONDING TO THE EVIDENCE: KEY STRATEGIES, PLANS, AND POLICIES

Ealing Council has developed a number of policies, plans, and strategies to tackle the climate emergency, deliver good jobs, and reduce inequality.

Plan for Good Jobs (2021): The plan outlines actions the council will take over the next 12 months, and the measures of success for the council. The Plan for Good Jobs includes priorities to: support the borough's hardest hit residents; investing in the borough's most left behind towns and communities; protecting, nurturing and expanding businesses in the borough; and promoting the green recovery.

Social Value Policy (2022): The goods and services that Ealing Council buys are an important lever the council posses to drive improved social, economic, and environmental outcomes. The borough's new Social Value Policy includes a commitment to **r**eviewing procurement thresholds to support, and channel greater procurement spend directly and through supply chain to our local economy to help accelerate economic recovery. The policy also includes requirements for contractors agree to our Ethical Code as a condition of trading with the council and to confirm that supplies, services and works are safe, that workers are treated with respect and dignity and that manufacturing processes are environmentally responsible**.**

Ealing Race Equality Commission (2022): The Ealing Race Equality Commission was set up to explore how structural race inequalities persist in Ealing and its built environment, acting as a barrier to prosperity and security to Ealing's diverse community. By engaging with the community, employers and professionals, the commission delves into challenges and recommendations for existing issues in education, employment, health, income, crime and justice and community participation and democracy.

Shaping Ealing and the Local Plan (2022): Shaping Ealing is the engagement activity that will inform the local plan. The Local Plan is the council's key policy lever that will be used to shape how land is used and how places across the borough may change over the next 15 years. In addition to consultation, the local plan will be evidence bases which will underpin planning policy**.** Key economic studies include an updated employment land review, Industrious Ealing (which will define the borough's approach to industrial land), and Affordable Workspace strategies. This also includes bespoke 20-minute neighbourhood studies for Greenford and Perivale, Northolt, and Acton which will inform spatial strategies in these places.

CHAPTER 2

SOUTHALL'S HEADLINE ECONOMIC PERFORMANCE

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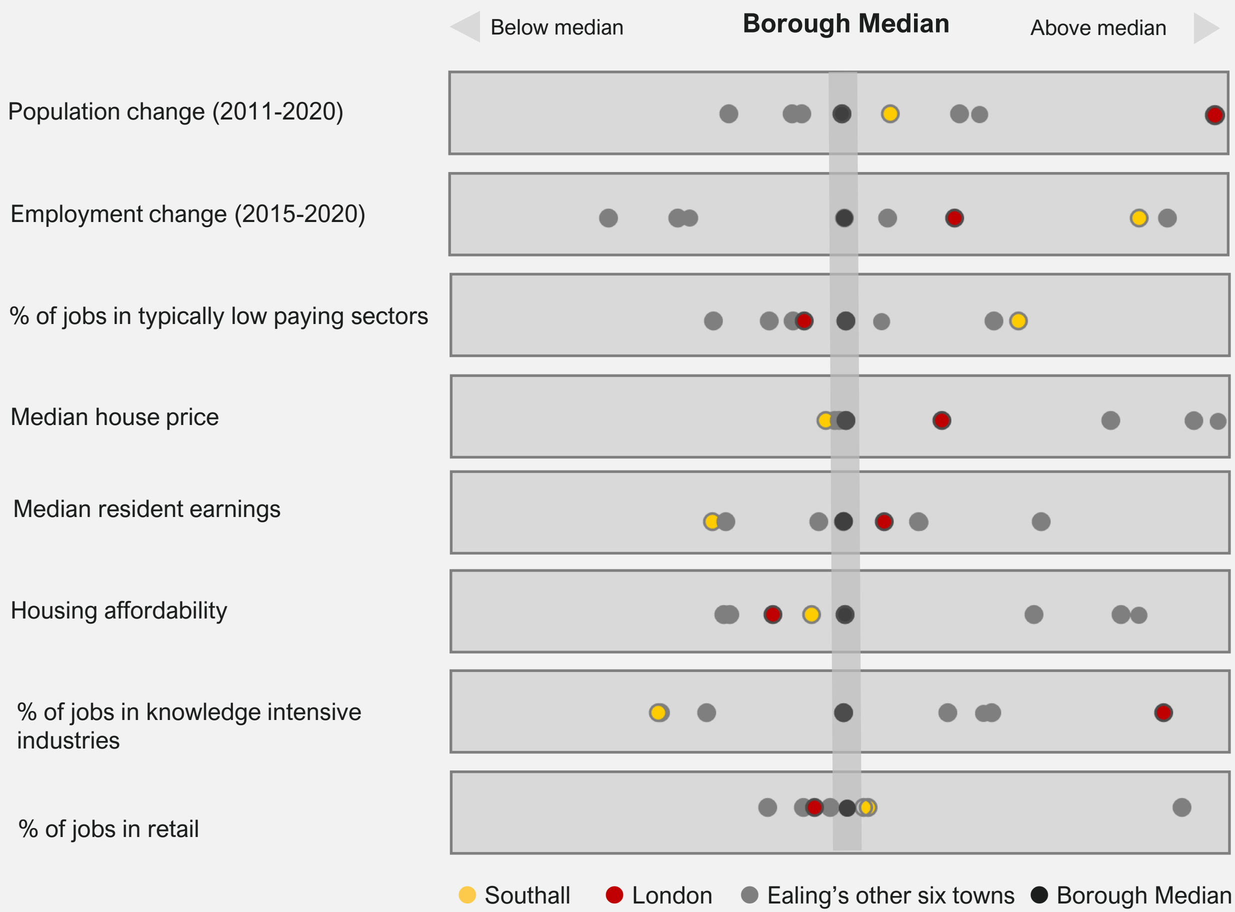
SOUTHALL'S HEADLINE ECONOMIC PERFORMANCE: JOBS AND HOMES



Southall's population grew by 1% since 2011. This is above the borough median ranking **3rd** out of the 7 towns

Southall's employment has changed by 15% since 2015. This is above the borough median ranking **2nd** out of the 7 towns

52% of Southall's jobs are classified as low pay work. This is the highest proportion of all of the borough's towns.

Southall's median house price was £427,500 in 2018. This is below the borough median ranking **7th** out of the 7 towns

Southall's median resident earning was £31,200 in 2018. This is below the borough median ranking **7th** out of the 7 towns

Southall's affordability ratio is 12.5 times average income. Southall is therefore the third most affordable of Ealing's seven towns.

7% of Southall's jobs can be classified as knowledge intensive. This is below the borough median ranking **6th** out of the 7 towns

11% of Southall's jobs are in the retail sector. This is above the borough median ranking **3rd** out of the 7 towns

Sources: ONS Mid Year Population Estimates, BRES, Business Counts, ASHE

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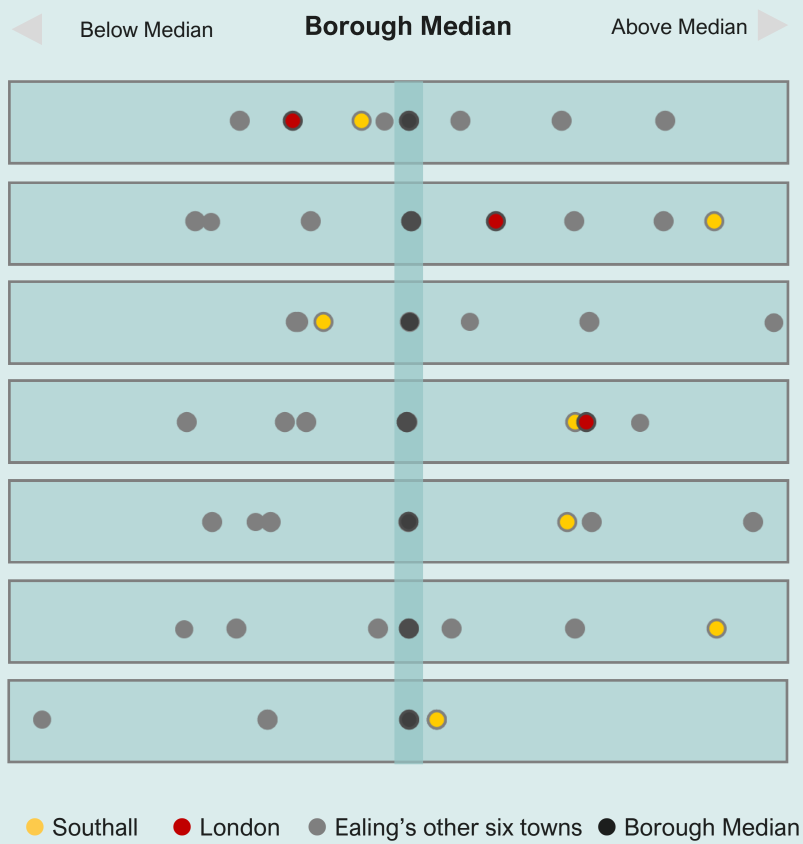
SOUTHALL'S HEADLINE ECONOMIC PERFORMANCE: ENVIRONMENT AND ECONOMY



% of jobs in typically carbon intensive industries — 22% of Southall's jobs are considered to be carbon intensive. This is below the borough median ranking **6th** out of the 7 towns

Business growth (2016-2021) — Southall's businesses have grown by 20% since 2015. This is above the borough median ranking **1st** out of the 7 towns

Sqm of office space — 5% of Southall's employment land is classified as office space. This is below the borough median ranking **5th** out of the 7 towns

Population Density — Southall's population density is 84 persons per hectare. This is above the borough median ranking **2nd** out of the 7 towns

Domestic Electricity Consumption — Southall's median electricity consumption is 2869.7 kWh per meter. This is above the borough median ranking **3rd** out of the 7 towns

Domestic Gas Consumption — Southall's median gas consumption is 15173.5 kWh per meter. This is above the borough median ranking **1st** out of the 7 towns

Estimated CO2 Emissions per dwelling (tonnes/year) — Southall's median dwelling emits 3.2 tonnes of CO2 per year. This is below the borough median ranking **joint 1st** out of the 7 towns

Sources: ONS BRES, VOA, Mid-year Population Estimates

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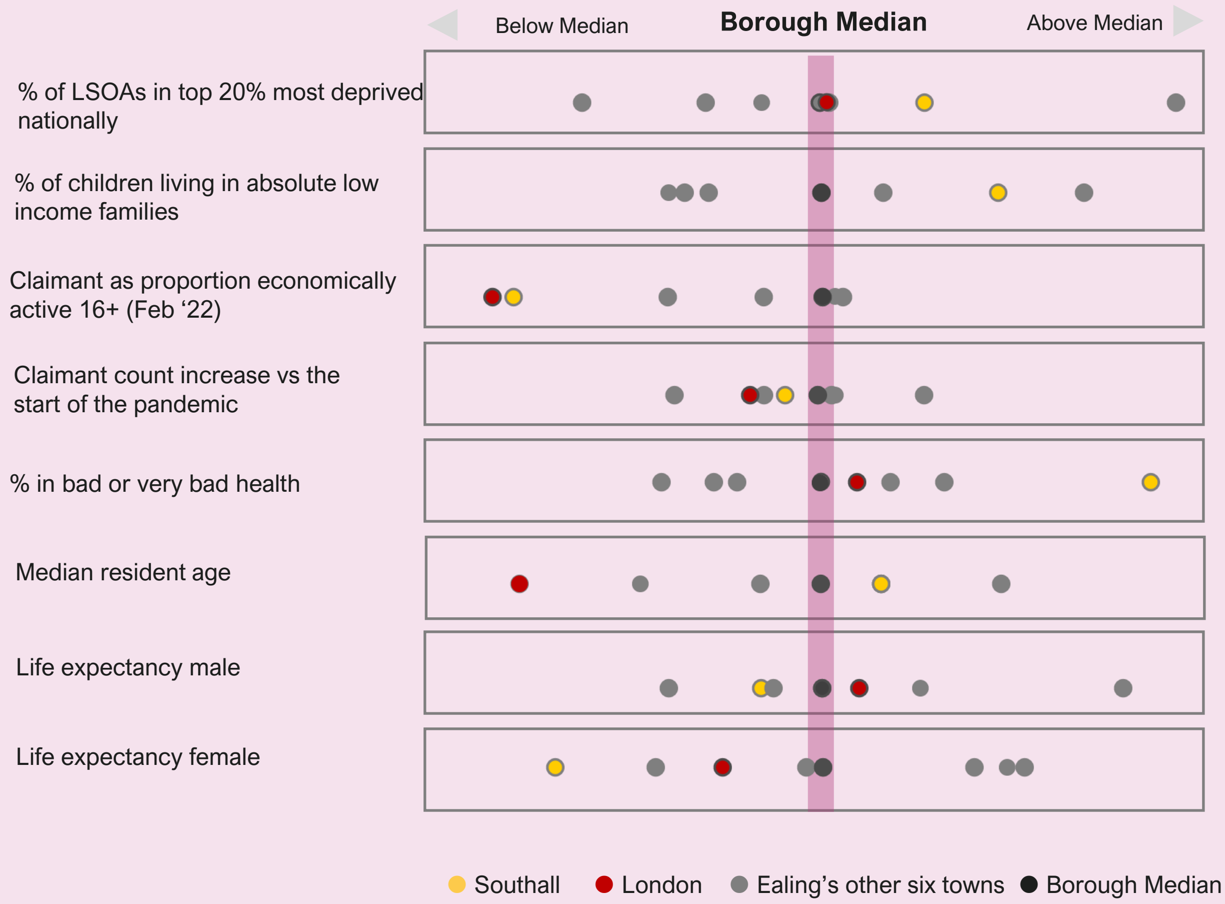
SOUTHALL'S HEADLINE ECONOMIC PERFORMANCE: EQUALITY AND PEOPLE



23% of Southall's LSOAs are in the top 20% deprived nationally. This is above the borough median ranking **2nd** out of the 7 towns

As of 2020/2021 there were 605 relatively low income households. This is above the borough median ranking **2nd** out of the 7 towns

Southall's proportion of 16+ receiving claimant benefits is 14.1%. This is below the borough median ranking **7th** out of the 7 towns

Southall's claimant count increase since the start of the pandemic is 88%. This is below the borough median ranking **5th** out of the 7 towns.

6.7% of Southall's population are in bad or very bad health. This is above the borough median ranking **1st** out of the 7 towns

Southall's median age is 38. This is less than the borough median ranking **joint 2nd** out of the 7 towns

Southall's male life expectancy is 77.9. This is below the borough median ranking **6th** out of the 7 towns

Southall's female life expectancy is 82.5. This is below the borough median ranking **7th** out of the 7 towns

Sources: ONS Claimant Counts, PHE, IMD

SOUTHALL'S HEADLINE ECONOMIC PERFORMANCE

STRENGTHS

+ **Economic Growth:** Southall has experienced the most significant business (20%) and employment (15%) growth in the borough over the last 5 years. However, the quality of the new employment created has largely been poor, and this is analysed further on Page 30.

+ **Affordability:** Southall is one of the most affordable towns in Ealing. Despite this, the Shaping Ealing feedback suggested that access to affordable housing is still a key issue for many residents.

WEAKNESSES

- **Child poverty:** Southall has over 600 children living in absolute low income households. This is the 2nd highest in Ealing.

- **Low Paying Jobs:** Southall residents earn the least in the borough. It has the highest proportion of jobs in low paying industries (such as retail) and the lowest proportion of high value, knowledge intensive jobs.

- **Health Indicators:** Deprivation in Southall is amongst the highest in the borough. Local deprivation is being driven by challenges in income and health domains. Southall has the lowest life expectancy in the borough as well as the highest proportion of people in bad or very bad health.

- **Emissions and energy consumption:** Domestic energy consumption and Co2 emissions are amongst the highest in the borough. A focus on green jobs and upskilling local people in retrofitting can help to address this (see page 36).

CHAPTER 3

SOUTHALL'S ASSETS, STRENGTHS AND USP

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WHAT WE'VE HEARD

Initial engagement to inform the new Local Plan for Ealing was launched on 10 November 2021. It consisted of an online survey on the GiveMyView digital platform and a series of community engagement events held in various parts of the borough. The online survey has received over 10,000 responses. The proportion of responses varies by area, and while responses from Ealing (41% of total as compared to 25% of the borough's population resident in Ealing) and Hanwell (10% vs 8% population) towns are disproportionately larger, responses from all other town are smaller as compared to their populations. Responses from Southall are noticeably lower (10% as compared to 21% population). It is worth noting that respondents from Southall were significantly more negative than the borough average. However, the key things which Southall residents were most positive about are presented below:

There was **26%** net agreement that Southall has good public transport. This is likely to improve with the arrival of Crossrail.

There was **8%** net agreement that people in Southall feel welcome in the local area

There was **19%** net agreement that people from different backgrounds in Southall get on well together.

There was **11%** net agreement that people in Southall felt a sense of belonging.

SOUTHALL'S POPULATION

Southall is home to 70,176 people. This is equivalent to 21% of the borough's population. Since 2011, Southall's population has grown by 1%.

The average age of a Southall resident is 38. This is higher than the median age of Ealing and London residents. Despite this, 23% of Southall's residents are under the age of 15, compared 22% in the borough as a whole.

Southall is one of the most diverse places in the borough. In 2011, 86% of Southall's population was non-white. 66% are Asian/Asian British and there is evidence to suggest the population is becoming increasingly diverse.

48% of Southall's population are educated to degree-level (NVQ 4+) compared to 66% in Ealing and 60% in London.

22% of Southall's population have no qualifications compared to 7% in Ealing, 6% in London.

7.7% of Southall's economically active population are claiming benefits. This is slightly higher than the Ealing average which stands at 6.8%.

Sources: Census 2011, ONS Mid Year Population Estimates, Annual Population Survey

SOUTHALL’S MAJOR EMPLOYERS (1)

Ealing Hospital NHS Trust

General hospital providing a range of clinical services.

St Bernard’s Hospital

Public sector hospital delivering a wide range of specialist mental health services and some physical health services.

Noon Products

Food manufacturing is an important sector specialism for Southall. Noon Products is a manufacturer of chilled and frozen ready meals, predominantly under supermarkets' own brand ranges. Specialists in world-food ready meals.

SOUTHALL'S MAJOR EMPLOYERS (2)

Strategic Industrial Land is integral to Southall's economic identity. Several of Southall's largest employers are based in designated industrial land and this provides a significant number of jobs for Ealing's residents.

Delifrance

Headquarters of Delifrance oversees the retail sale of bread, cakes, flour confectionery and sugar confectionery.

London Workwear Rental

Offers a workwear hire and laundry service nationally providing chefs wear, uniforms & kitchen wear.

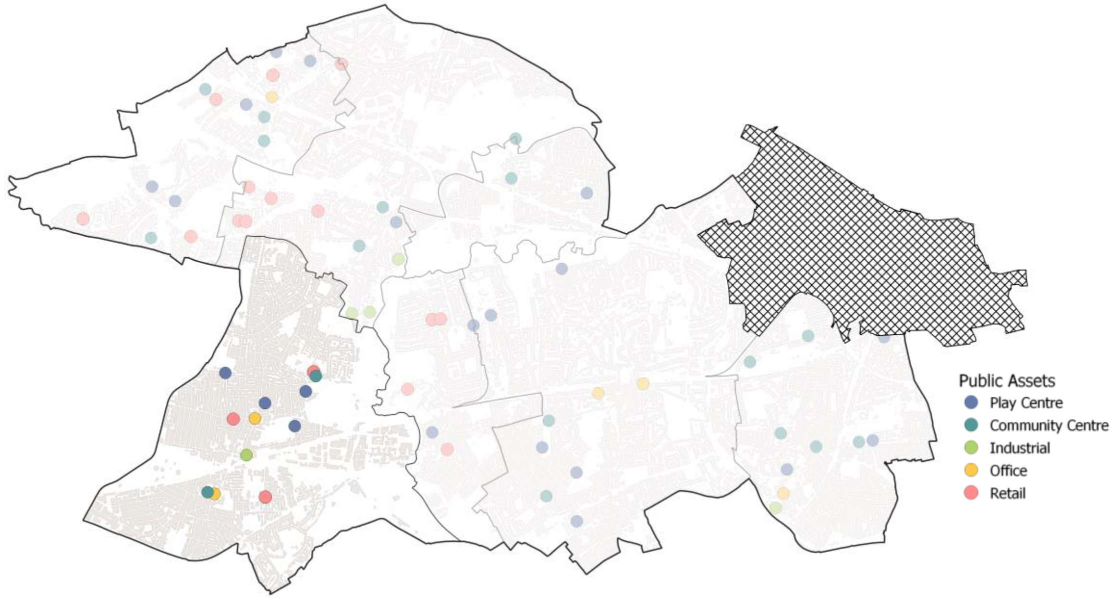
SOUTHALL'S KEY PUBLIC SECTOR ASSETS

Dormers Wells Children's Centre: Work with local families and the community to provide a safe environment for children aged 0-5.

Grove House Children's Centre: Provides childcare and education in the nursery school and children's centre.

Southall Park Children's Centre: Children's Centre provides integrated education, family support and health services.

Spikes Bridge Park Play Centre: provision for bowls, cricket, and tennis. Facilities include a wide range of both formal and informal facilities providing the whole family with opportunities to be active.



SOUTHALL’S CULTURAL INFRASTRUCTURE

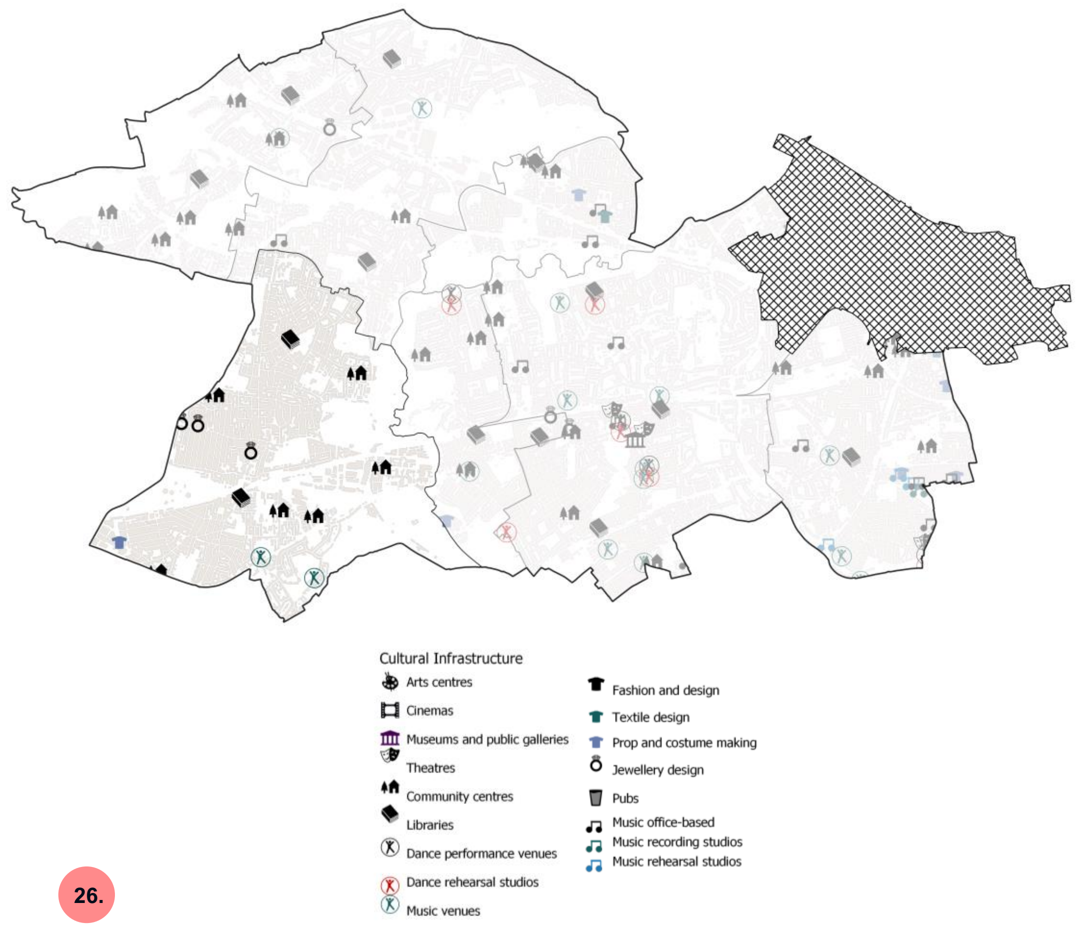
Southall’s two libraries, **Southall Library and Jubilee Gardens Library** have extensive audio and visual material to cater to their diverse catchment.

Jewellery

Three businesses in Southall specialise in the creation and design of jewellery **Allauddin Jewellery , Diamond Jeweller, Shk Golden Services**

Classic Prop Hire specialises in dressing, props and textiles to hire for films, TV, events and stills.

Music Venues:
The Lamb is a pub that offers live music such as karaoke. There is potential to increase this type of provision to boost Southall’s night time economy.



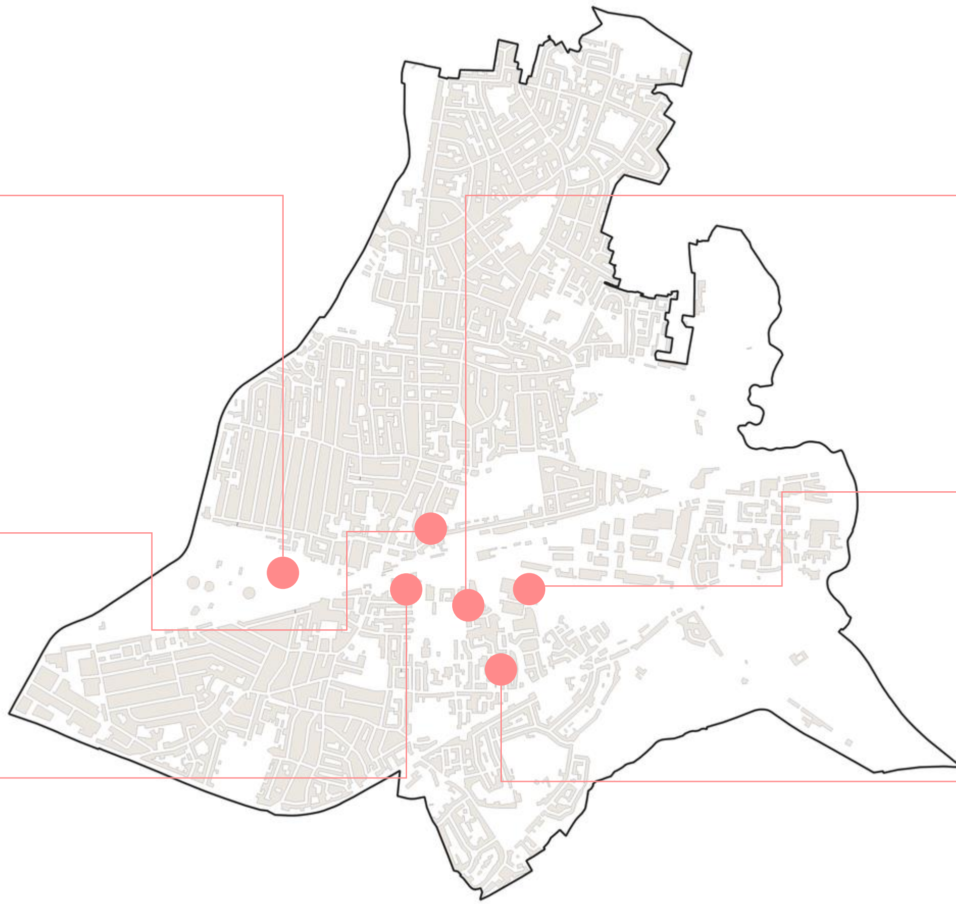
SOUTHALL'S MAJOR DEVELOPMENTS

There is significant development underway across Southall. Some of the largest schemes have been included below.

Southall Waterside
Redevelopment of the Southall Gasworks site. 20ha of public realm and parkland. 3,750 homes (30% affordable).

Southall Park Avenue
Housing blocks between 5 and 25 storeys. Delivering 513 new homes and 1,131sqm of flexible commercial space. Planning consent is still to be determined.

The Arches (Merrick Place)
4 towers ranging from 15 to 23 storeys. Delivering 575 new homes and 2,549 sqm of flexible commercial space. Construction is yet to commence.



Margarine Works
This project will deliver 2,083 new homes, 10,076 sqm of flexible commercial space, 2,688sqm retail space, and 7,199sqm for a hotel. Construction is yet to commence.

Quayside Quarter
The former Honey Monster factory. Delivering: 1,997 new homes, 2,275 flexible commercial, 964 sqm community uses, 27,873 sqm industrial. Construction yet to commence.

Havelock Estate Regeneration
The masterplan will provide 922 new homes, of which 53% will be affordable. This will also provide 840sqm of flexible commercial space and 280sqm for community uses.

CHAPTER 4

TOWN CHALLENGES

Ealing

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WHAT WE'VE HEARD

Initial engagement to inform the new Local Plan for Ealing was launched on 10 November 2021. It consisted of an online survey on the GiveMyView digital platform and a series of community engagement events held in various parts of the borough. The online survey has received 10,254 responses until 31 March 2022. The proportion of responses varies by area, and while responses from Ealing (41% of total as compared to 25% of the borough's population resident in Ealing) and Hanwell (10% vs 8% population) towns are disproportionately larger, responses from all other town are smaller as compared to their populations. Responses from Southall are noticeably lower (10% as compared to 21% population). The key things which Southall residents believed to be bad about their local area are presented below:

954 or 10% of the total responses have been received from Southall. Overall, views from Southall are **much more negative as compared to the borough overall as well as other areas.**

The vast **majority of people in Southall do not feel safe**. Only 16% agree they feel safe in Southall while 60% disagree.

The biggest divergence from the borough-wide results is on the **availability of clean and safe parks and open spaces in Southall.** While the net agree score for the borough is 27% for this measure (51% people agree whereas 25% disagree), in Southall the net score is -43%.

Residents also have **low satisfaction with local facilities** (Ealing score 10%, Southall -19%) and **availability of shops and leisure facilities** (Ealing score 1%, Southall -23%).

KEY CHALLENGE 1: LOW PAY, POVERTY AND DEPRIVATION

WHAT THE EVIDENCE SHOWS...

Southall is where the borough-wide challenges of deprivation, low pay, are particularly acute. This is contributing to deeply embedded health and wellbeing challenges.

- The financial resilience of Southall's residents is likely to be severely tested by the cost of living crisis. High levels of domestic gas and energy consumption (see Page 17) is also likely to mean residents will be hit hardest by rising wholesale energy prices, which are due to increase again in October 2022.
- Earnings in Southall are the second lowest in the borough and significantly below the London average. Once housing costs are considered, net annual income is 18% less than the London average.
- This is exacerbated by high proportions of local employment in typically low paying sectors. The 2021 Low Pay Commission Report defines low paying sectors as: "industries which contain a high number or large proportion of low-paid workers based on the Standard Occupation Classification (SOC) and Standard Industrial Classification (SIC) codes published by ONS." Lowest paying industries in London includes Accommodation and Food (£16,303) and Wholesale and Retail (£22,974). By this definition, over half (52%) of Southall's jobs are in low paying sectors.
- These factors are compounded by high levels of deprivation, and has the second highest rates of extreme deprivation in the borough. 24% of Southall's neighbourhoods are within the top 20% most deprived nationally.
- This is contributing towards poor health and wellbeing outcomes in Southall – which are amongst the worst in Ealing. It has the lowest life expectancy in the borough as well as the highest proportion of people in bad or very bad health.

Key socio-economic indicators for Southall vs London & Ealing's other seven towns

	Net annual income (2018)	Net annual income after housing costs (2018)	% of jobs in low paying industries	% of LSOAs in the top 20% most deprived nationally
1.	Ealing (£52,200)	Ealing (£37,578)	**Southall (52%)**	Northolt (40%)
2.	Acton (£47,843)	Acton (£33,143)	Northolt (47%)	**Southall (24%)**
3.	Perivale (£47,700)	Hanwell (£33,250)	Acton (39%)	Hanwell (17%)
4.	Hanwell (£47,075)	**London (£31,610)**	Ealing (37%)	Greenford (13%)
5.	Greenford (£44,680)	Perivale (£29,350)	London (33%)	Ealing (9%)
6.	**London (£43,114)**	Greenford (£28,080)	Greenford (32%)	Acton (6%)
7.	**Southall (£41,271)**	**Southall (£25,886)**	Hanwell (28%)	Perivale (0%)
8.	Northolt (£39,200)	Northolt (£25,200)	Perivale (26%)	

Sources: ONS, BRES, IMD

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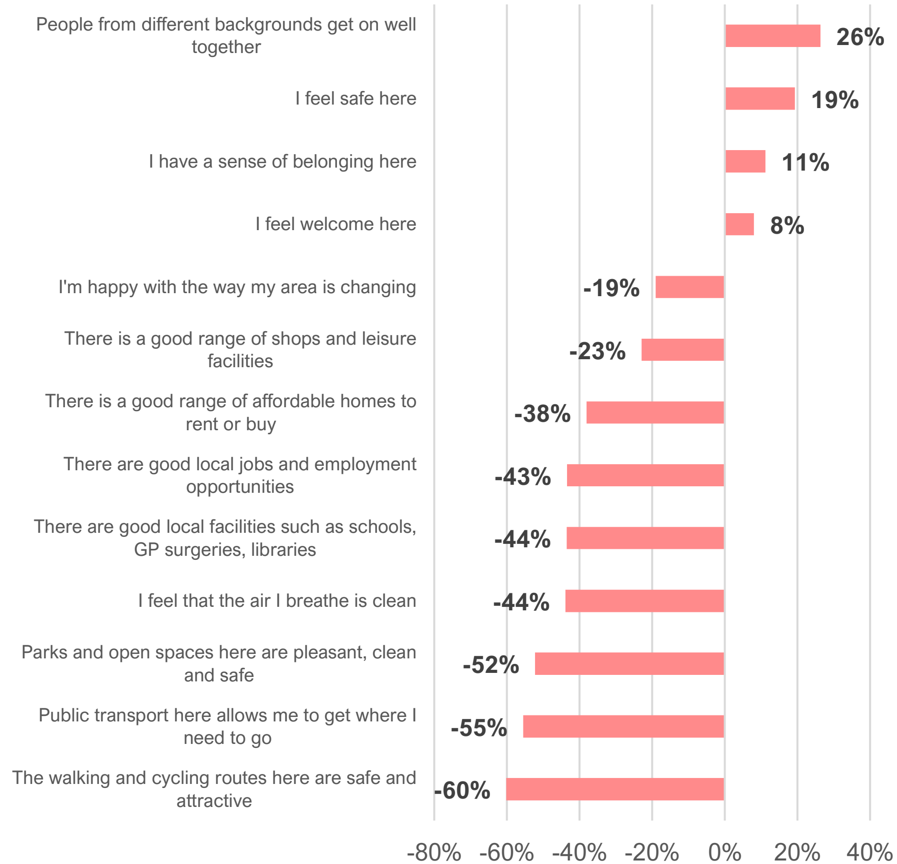
KEY CHALLENGE 2: PLACE PERCEPTION

WHAT THE EVIDENCE SHOWS...

The Shaping Ealing Survey was the first phase of non-statutory engagement on the new Local Plan. An online survey was undertaken and a series of community engagement events held in various parts of the borough. Overall, views from Southall were significantly more negative compared to other parts of Ealing.

- The biggest divergence from the borough-wide results was on the availability of clean and safe parks and open spaces in Southall. While the net agree score for the borough is 27% for this measure (51% people agree whereas 25% disagree), in Southall the net score is minus 43%.
- The vast majority of people in Southall do not feel safe. Only 16% agree they feel safe in the town while 60% disagree.
- Residents also have low satisfaction with local facilities (Ealing score 10%, Southall -19%) and availability of shops and leisure facilities (Ealing score 1%, Southall -23%).
- Generally, these findings run contrary to the professional audit of the town. The Town Centre Health Check undertaken by Arup which suggested that Southall town centre performed relatively well compared to other centres in the borough.
- This suggests a significant disconnect between resident and visitor place perception which the Town Forum should seek to address.

Net positive/negative scores from Southall repondents to the non-statutory Shaping Ealing consultation



Source: Shaping Ealing Survey

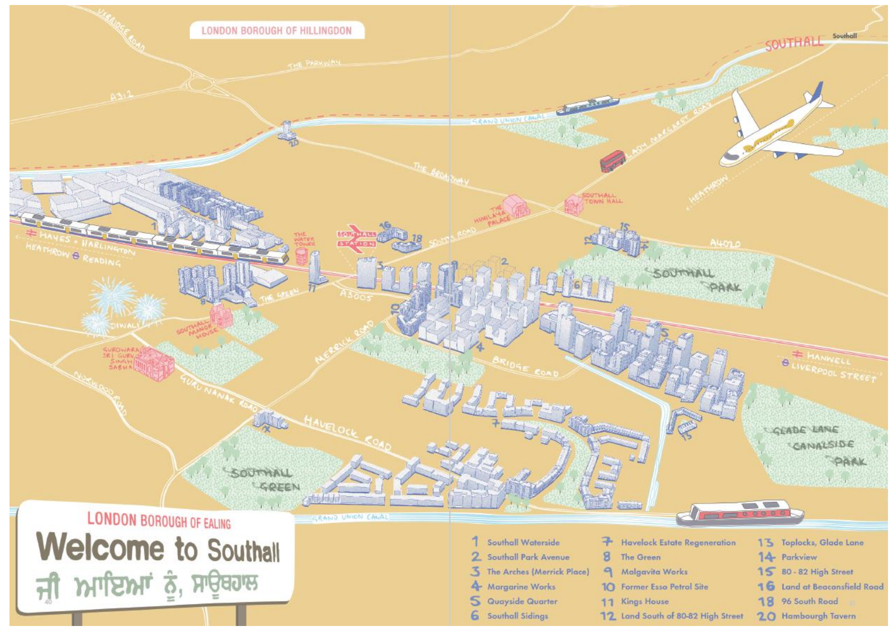
KEY CHALLENGE 3: RETAINING SOUTHALL'S IDENTITY AMID SCALE OF DEVELOPMENT

WHAT THE EVIDENCE SHOWS...

Arup's town centre health check noted Southall's strong sense of place identity. However, there is concern locally about the pace of change in the town with some businesses feeling that they are being pushed out.

- Southall is identified in the Mayor's London Plan as an Opportunity Area (OA) with potential for 9,000 new homes and 3,000 new jobs by 2041.
- However, Research undertaken as part of the Shaping Ealing consultation suggested that local people were concerned about the pace of change in Southall. There was 38% net disagreement that people from Southall were happy with how their area was changing, which was more unfavourable that the borough average.
- This was also reflected within Southall's business community, as reflected by on-the-ground research by the architecture and urbanism practice, We Made That. This revealed that many businesses expressed anxiety over the future of their premises and concerns that their businesses would not be viable should they be required to move outside the area.
- Particular concerns came from MOT and auto repair traders, who have recently seen other traders lose their premises to forthcoming development.
- The study suggested that businesses benefitted from strong formal and informal networks within Southall and recognised that the cost of higher quality premises would be prohibitive to their continued operation.
- Southall and its cluster of industrial estates continue to attract and retain a wide mix of industrial activities and employment opportunities and businesses operating across the sites were noted to see the area as a productive place to do business.

Proposed development in Southall



Source: Allies and Morrison: Southall Baseline Study, We Made That

CHAPTER 5

SOUTHALL’S OPPORTUNITIES

Ealing
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OPPORTUNITY 1: IMPROVING TOWN CENTRE ENVIRONMENT AND SAFETY

A POTENTIAL PRIORITY COULD BE…

To support Southall's businesses community to address perceptions of poor safety and town centre environment.

- There are a range of examples showing how business collaboration can help to address local challenges of crime and improving town centre experience. One route to achieving this could be a Business Improvement District for Southall town centre.
- Business Improvement Districts (BIDs) have been delivering a wide range of benefits across UK business communities since 2003. However, over the past 16 years has presented the BID industry with significant challenges to demonstrate their value in light of austerity and the wider challenges facing high streets.
- BID consultation feedback gathered from business communities across the capital has clearly demonstrated that 'safe and secure' issues consistently rate amongst the top concerns for levy payers. There are a wide range of examples for how BIDs have supported crime reduction and there is evidence of a more holistic approach to crime reduction which includes working with working with the Metropolitan Police (BID Safe and Secure Report).
- BIDs also play a key role in improving the town centre environment. For example, InStreatham BID and Brixton BID have funded deep street cleaning, jet washing and removing chewing gum throughout the BID area, and this is a service Brixton BID plans to repeat annually.
- In Streatham, Vauxhall One and Team London Bridge have introduced greenery using hanging boxes, planters, and green walls to enhance the streetscape

Case Study 2: Hammersmith BID and Crime Reduction Partnership

- The Hammersmith ShopWatch Scheme is a component of the wider Hammersmith BID – Crime Reduction Partnership (BID-CRP).
- Working in partnership with the Metropolitan Police and local authority (LBHF), our objectives are to support the business community by reducing crime and anti-social behaviour, and to establish a safer environment in which to work, visit and invest in.
- Hammersmith BID are also committed to supporting the public realm and greening investment. We will consult with our stakeholders to create a strategy for a more resilient and attractive town centre. This will include provision of safe, outdoor spaces, green public art, enhanced lighting, and potential pedestrian zones.

OPPORTUNITY 2: HARNESSING INVESTMENT TO CREATE GREEN JOBS

A POTENTIAL PRIORITY COULD BE…

Working with local institutions to future-proof Southall’s economy and create new good green jobs.

- Currently, just over one in five jobs (22%) in Southall are in carbon intensive industries. This means that these jobs are in sectors that typically produce more CO_2 emissions such as Transport, Manufacturing, and Construction. These jobs will need to change significantly if the UK is to meet its net zero obligations.
- Whilst the transition to net zero represents a key local challenge, there is also significant opportunity for economic renewal for places such as Southall. As shown on Page 17, domestic properties in Southall perform poorly for emissions and energy consumption – meaning the town should be a key focus for interventions such as retrofitting and enhancing energy performance of domestic and commercial property.
- Local institutions are already leading the way in ensuring residents and businesses have the skills to adapt to this. For example, the West London Green Skills Hub (see case study right) will be locating key bits of teaching in Southall.
- Initially, this will include equipping pupils at Southall Community College with skills in retrofitting and energy efficiency. This could create significant employment opportunities for Southall’s residents, helping to diversify the activities and specialisms of existing local construction businesses.

Case Study 2: West London Green Skills Hub

- The West London Green Skills Hub, part of the Mayor's Academies Programme, was launched today at West London College (31 January 2022). This £44m Programme will support Londoners into good jobs in sectors key to London’s recovery
- The West London Green Skills Hub is dedicated to improving employment opportunities, reskilling the workforce, boosting West London’s economy and playing its role in helping to achieve the Mayor’s net zero target for carbon emissions by 2030.
- Initial focus will be on five key components of the future green economy: Retrofitting and Energy Efficiency; low carbon transport; Green spaces; circular economy; light green skills. Each area will have an industry lead which will help to define short, medium, and long-term skills needs.

This briefing has been compiled by PRD in partnership with Ealing Council. PRD are a place and economy consultancy and have recently been supporting the council to develop the evidence base to inform the Local Plan as part of the Industrious Ealing workstream

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