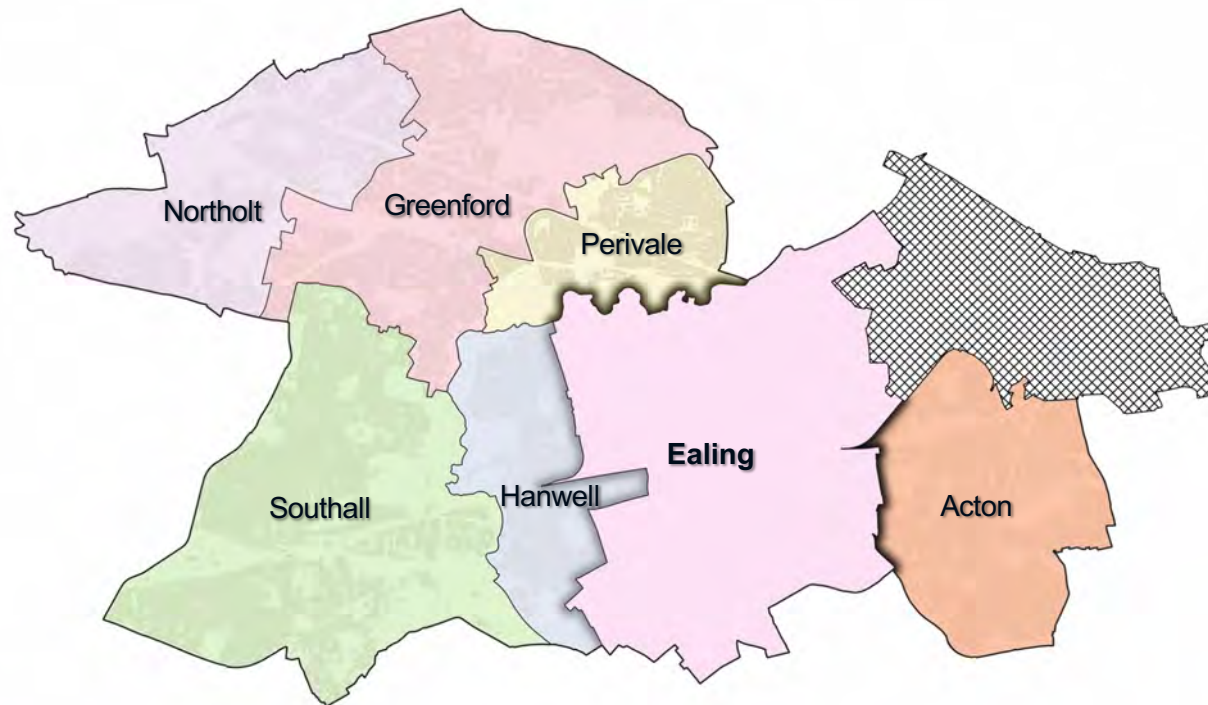


TOWN BRIEFING: EALING

JUNE 2022

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 Ealing sub-area.



EALING TOWN BRIEFING

This Town Briefing provides high-level insight into the socio-economic character and performance of Ealing. It sets out how London and Ealing's economy has changed, before outlining how these factors are shaping prosperity and opportunity in Ealing. 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. Population data will be updated in Autumn 2022 following the publication of 2021 Census data at a town-level.

Ealing Town's Economic Profile

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

Economic evidence shows that Ealing performs poorly against affordability and growth indicators. However, Ealing performs strongly against quality of work, net zero resilience, and health measures.

Ealing Town'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 Ealing.

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

Ealing Town's challenges

Chapter 4 focuses on several key local challenges facing Ealing'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 a shrinking economy and a loss of higher value economic activity, combined with worsening affordability challenges.

Ealing's opportunities

Chapter 5 sets out three potential opportunities to explore within Ealing 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 ways of providing more affordable workspace for small businesses, and working with anchor land owners to drive enhanced social value.

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 grew by 7.7% between 2011 and 2021 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...

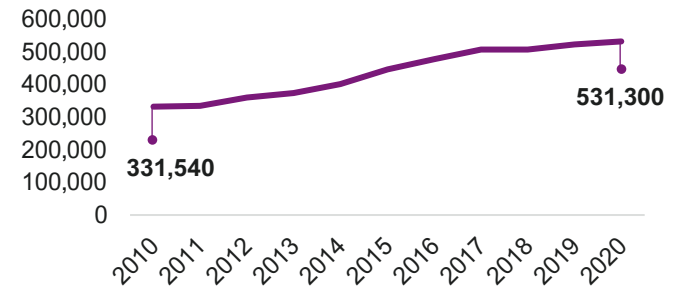
Long-term inequalities have been exposed and accentuated by the pandemic.

This is reinforced by the following indicators:

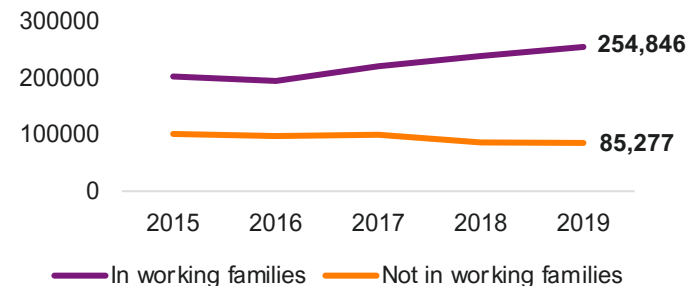
- **Food** – Between 2010 and 2020 the number of Londoners relying on foodbanks has increased from around 12,000 to over 200,000; this has subsequently doubled to over 400,000 since the start of the pandemic (Statista)
- **Work Security** - London saw the biggest decline of PAYE employees of any region 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



EALING'S PERFORMANCE IN LONDON: JOBS AND HOMES

	Employment growth 2015-19	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%	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%	Wandsworth £43,651	Camden 40,000	Tower Hamlets 24%	Newham 8,080	Bexley 10.57	Newham 15%	Wandsworth 57%
3.	Newham +12%	Islington £42,786	Hillingdon 39,000	Hounslow 26%	Brent 6,933	Havering 11.33	Hackney 12%	Greenwich 56%
4.	Barking and Dagenham +12%	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%	Westminster £41,977	Barnet 33,000	Southwark 28%	Southwark 5,789	Newham 11.90	Southwark 2%	Redbridge 56%
6.	Kensington and Chelsea +10%	Bromley £41,170	Ealing 31,000	Westminster 30%	Greenwich 5,574	Tower Hamlets 11.97	Tower Hamlets 1%	Croydon 55%
7.	Southwark +10%	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%	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%	Lambeth £40,511	Bromley 29,000	Camden 33%	Wandsworth 4,943	Greenwich 12.36	Bromley -5%	Waltham Forest 54%
10.	Bexley +8%	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%	Hammersmith and Fulham £39,430	Enfield 29,000	Harrow 35%	Lambeth 4,307	Hillingdon 13.11	Camden -6%	Haringey 53%
12.	Brent +7%	Harrow £38,827	Hounslow 29,000	Bromley 35%	Redbridge 3,910	Redbridge 13.26	Lambeth -6%	Newham 52%
13.	Havering +5%	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%	Bexley £37,572	Tower Hamlets 29,000	Merton 37%	Lewisham 3,506	Lewisham 13.43	Haringey -10%	Havering 52%
15.	Ealing +5%	Redbridge £37,118	Lambeth 28,000	Redbridge 37%	Croydon 3,455	Hillingdon 13.58	Havering -10%	Harrow 51%
16.	Islington +5%	Sutton £36,459	Islington 26,000	Redbridge 38%	Harrow 3,328	Harrow 13.97	Lewisham -10%	Sutton 51%
17.	Waltham Forest +5%	Hackney £36,351	Havering 25,000	Hillingdon 38%	Hackney 3,301	Waltham Forest 14.06	Bexley -11%	Richmond upon Thames 51%
18.	Hillingdon +4%	Croydon £36,347	Bexley 24,000	Barnet 38%	Haringey 2,902	Hounslow 14.45	Waltham Forest -13%	Enfield 50%
19.	Wandsworth +4%	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%	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%	Havering £35,885	Merton 23,000	Sutton 39%	Islington 2,600	Wandsworth 14.89	Hillingdon -15%	Bexley 45%
22.	Enfield +2%	Barnet £35,716	Newham 23,000	Ealing 40%	Westminster 2,524	Hackney 15.41	Barnet -15%	Hammersmith and Fulham 44%
23.	Sutton +2%	Hillingdon £35,695	Wandsworth 23,000	Greenwich 41%	Camden 2,202	Haringey 15.57	Wandsworth -15%	Westminster 42%
24.	Merton +2%	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%	Enfield £35,586	Kensington and Chelsea 20,000	Lewisham 42%	Enfield 1,777	Merton 15.97	Merton -18%	Ealing 41%
26.	Hounslow +1%	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%	Newham £34,869	Redbridge 18,000	Lambeth 43%	Bromley 1,477	Richmond upon Thames 16.61	Croydon -19%	Camden 36%
28.	Barnet +0%	Ealing £34,190	Waltham Forest 18,000	Enfield 43%	Havering 1,474	Barnet 16.80	Brent -21%	Southwark 36%
29.	Harrow +0%	Merton £34,127	Greenwich 17,000	Waltham Forest 44%	Sutton 1,442	Hammersmith and Fulham 19.02	Harrow -22%	Hillingdon 33%
30.	Lewisham -1%	Brent £33,805	Haringey 16,000	Kingston upon Thames 45%	Bexley 1,377	Camden 19.08	Enfield -23%	Islington 30%
31.	Haringey -1%	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%	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%		Barking and Dagenham 13,000	Kensington and Chelsea 47%	Kensington and Chelsea 809		Kingston upon Thames -28%	City of London 10%

Sources: ONS BRES, 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

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%		

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).

Despite significant housing delivery in Ealing this has not addressed affordability challenges. Over 5,000 new homes have been delivered in the borough since 2017 (Housing Delivery Test).

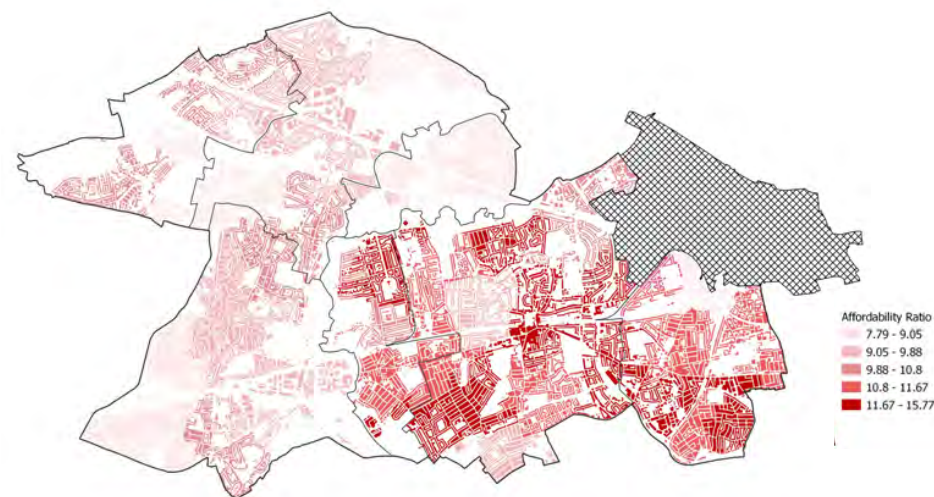
WHAT THE COUNCIL IS ALREADY DOING...

There is a clear role for the local authority to address a lack of affordable housing supply in the borough. 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.

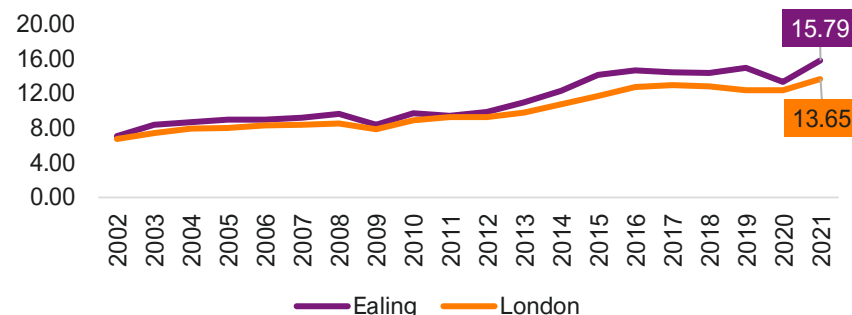
Broadway Living plays an important role in addressing Ealing's housing affordability challenges.

The council has directly delivered 460 of the new homes. The rest have been built by housing associations and private developers thanks to the council's planning system, which ensures that a proportion of all new homes are let at affordable rents.

Housing affordability Ratio, 2018



Housing affordability Ratio, 2002-2021



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...

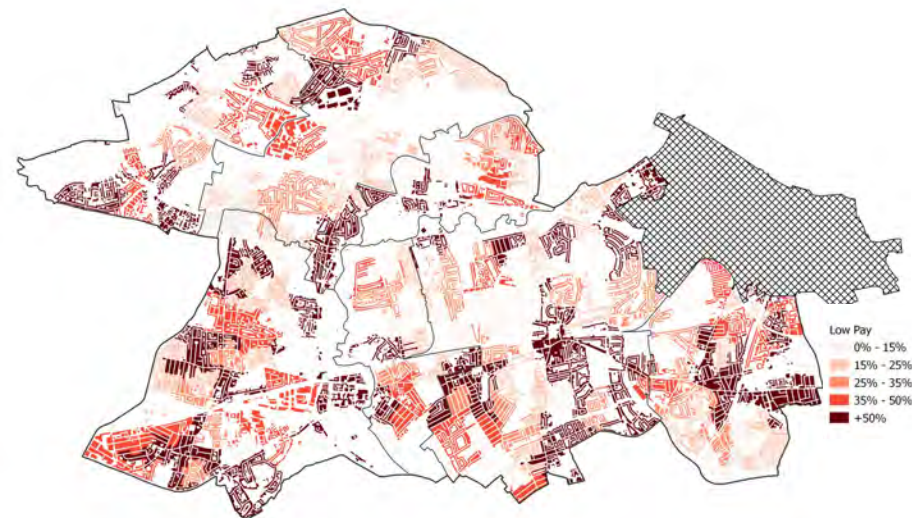
Ealing Council have supported residents and businesses throughout the pandemic. The council will now begin its long-term planning in relation to the economy.

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.

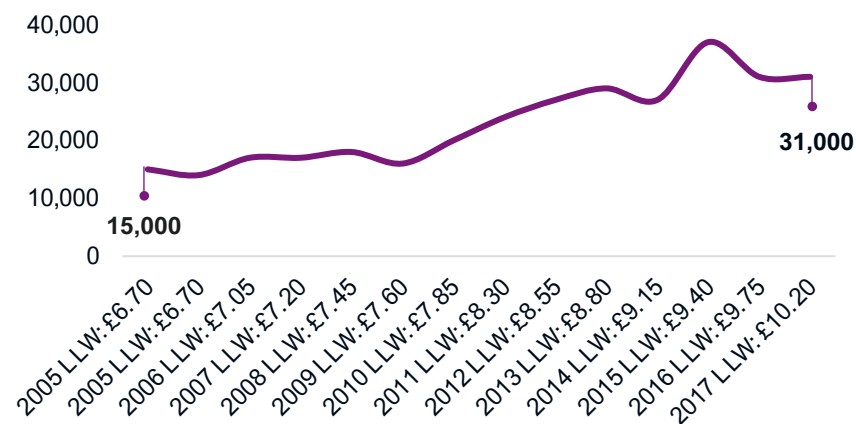
The Council's Plan for Good Jobs (see page 12) includes ongoing economic priorities for the next 12 months.

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



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).

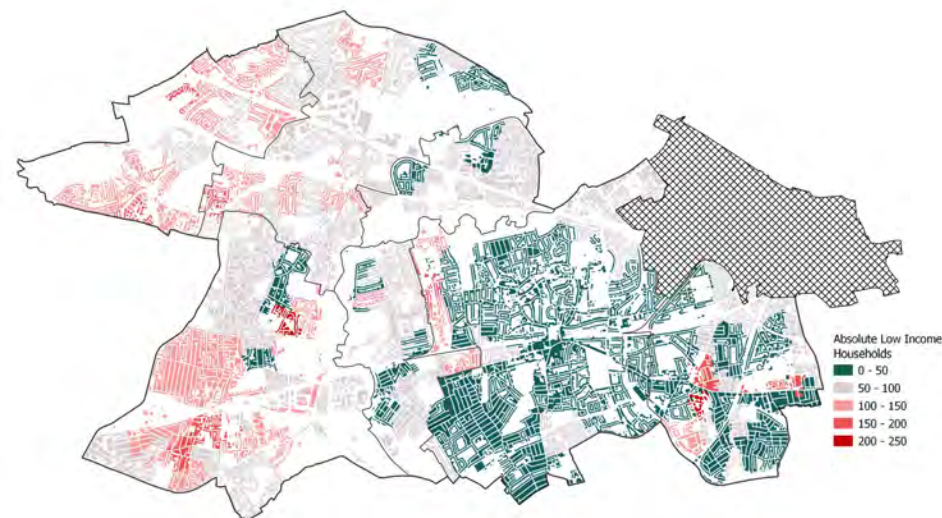
Low earnings, high housing costs, and poor quality work will all affect the economic resilience of households in the short-term as the cost of living crisis continues to bite.

WHAT THE COUNCIL IS ALREADY DOING...

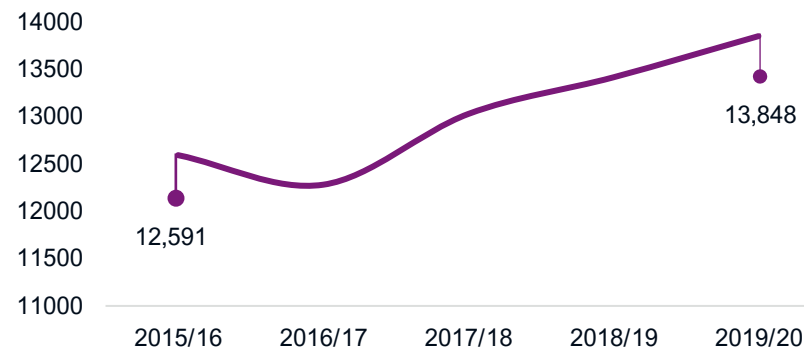
Ealing council is already providing significant additional help to support for residents on low incomes. This includes:

- **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 with 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



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...

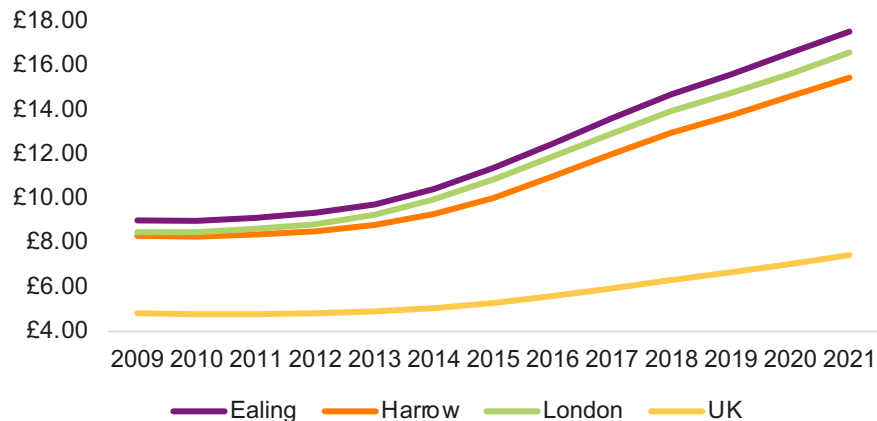
Industrious Ealing will provide the council with the evidence base to proactively shape demand to maximise benefits for its residents.

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.

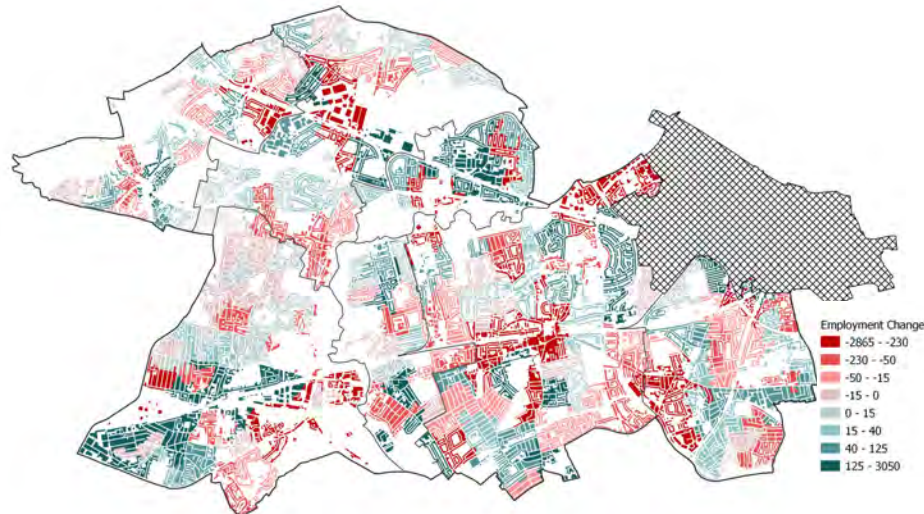
It will also outline the wider levers that the council could consider to maximise Ealing's industrial growth opportunity such as:

- 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

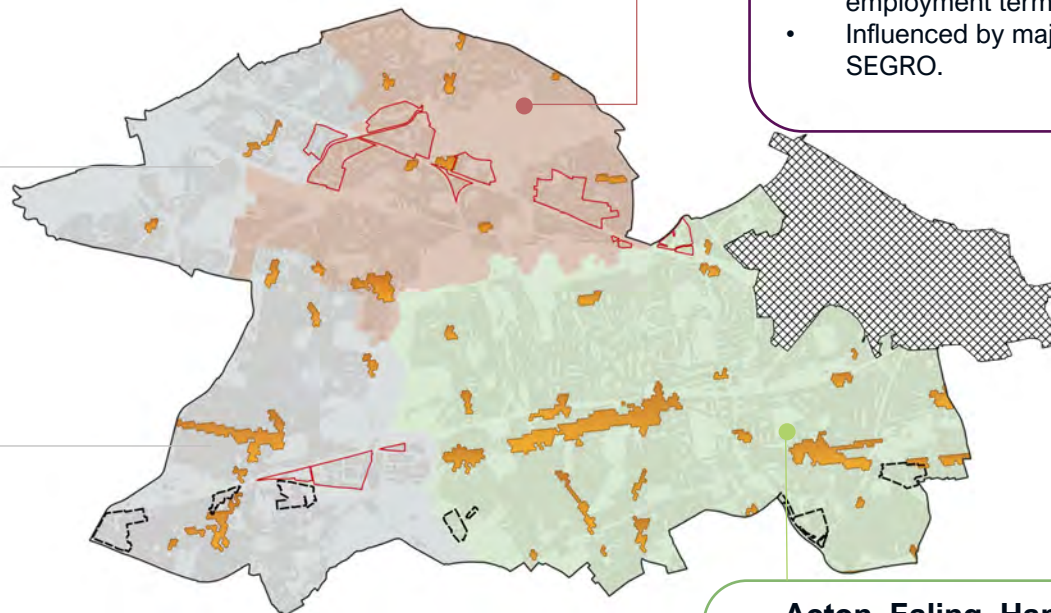


RESPONDING TO THE EVIDENCE: EALING'S THREE ECONOMIES

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.

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 possesses to drive improved social, economic, and environmental outcomes. The borough's new Social Value Policy includes a commitment to reviewing 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

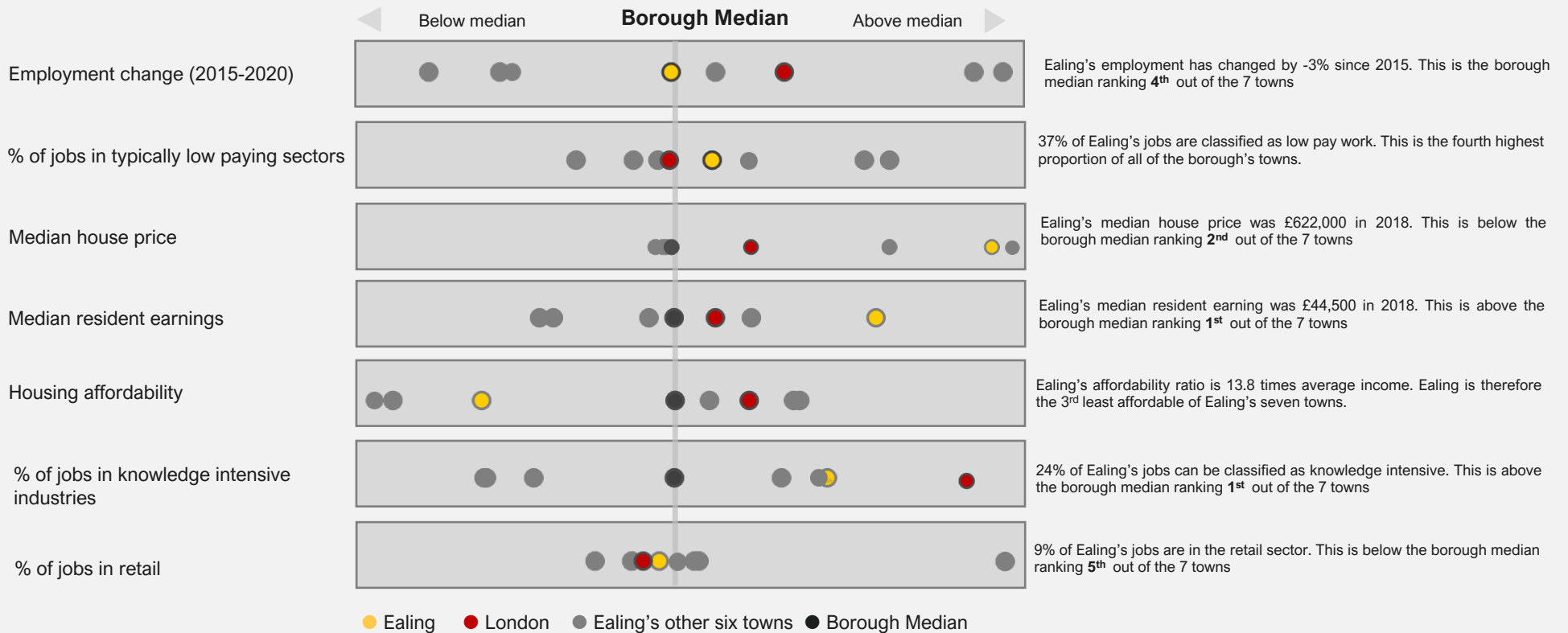
EALING TOWN'S HEADLINE ECONOMIC PERFORMANCE



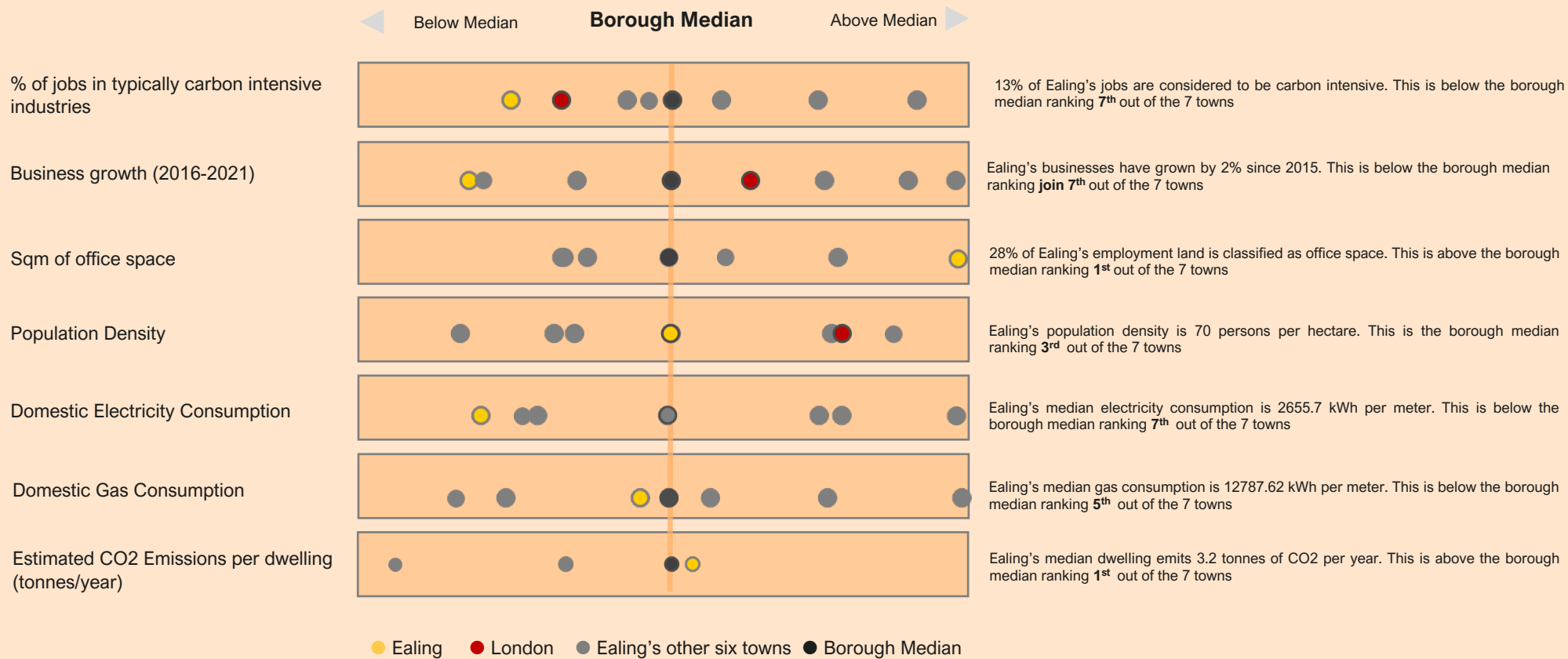
Ealing

www.ealing.gov.uk

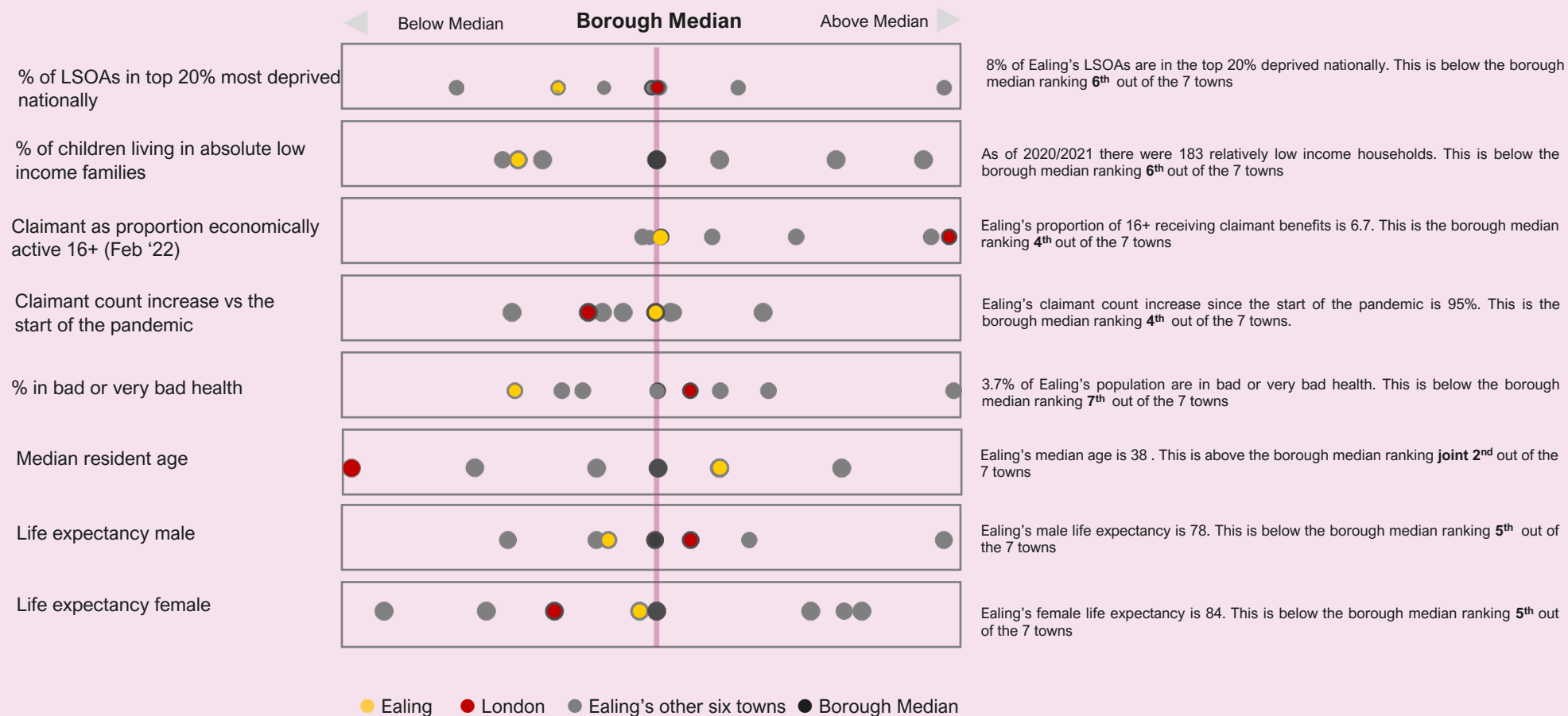
EALING'S HEADLINE ECONOMIC PERFORMANCE: JOBS AND HOMES



EALING'S HEADLINE ECONOMIC PERFORMANCE: ENVIRONMENT AND ECONOMY



EALING'S HEADLINE ECONOMIC PERFORMANCE: EQUALITY AND PEOPLE



EALING'S HEADLINE ECONOMIC PERFORMANCE

STRENGTHS

- + **High-Value Work:** The evidence shows that Ealing's residents are some of the highest paid in the borough. This can be linked to the having the highest proportion of jobs in the knowledge economy which are typically high-value and well paid. Ealing also has the highest quantities of office space in the borough.
- + **Net zero resilience:** Ealing has the lowest proportion of jobs in carbon intensive industries. This means that the transition to net zero by 2040 is likely to require a less significant economic transition.
- + **Health and Wellbeing:** Ealing has the largest proportion of residents in good overall health. It also has one the lowest proportions of extremely deprived neighbourhoods in the borough, and the fewest number of children living in absolute poverty.

WEAKNESSES

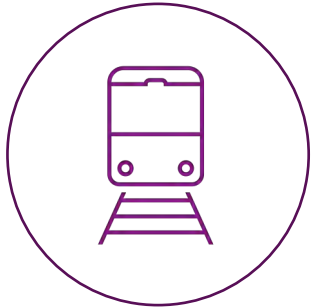
- **Housing affordability:** Ealing is the second most unaffordable town even though it has the highest residents earning in the borough. On average, residents are likely to pay 13.8 times their salary.
- **Shrinking economy:** The number of businesses in Ealing have only grown by 2% since 2015, meaning Ealing is the worst performing town in the borough. Despite its prominent economic role for the borough, the number of jobs in Ealing have fallen by 3% over the last five years.

CHAPTER 3

EALING'S ASSETS, STRENGTHS AND USPs

WHAT WE'VE HEARD

The first phase of non-statutory engagement on the new Local Plan for Ealing was launched on 10 November 2021 as a suite of activity under the “Shaping Ealing” umbrella. 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). On the whole, Ealing respondents were more positive about their area than the borough average. The key things which Ealing residents were most positive about are presented below:



There was **67%** net agreement that Ealing has good public transport. This is significantly higher than the borough average (52% net positive).



There was **56%** net agreement that people in Ealing have access to safe parks and open spaces.



There was **53%** net agreement that people from different backgrounds in Ealing get on well together.



There was **47%** net agreement that people in Ealing feel welcome here.

EALING'S POPULATION



Ealing is home to **83,600** people according to the ONS Mid-Year Population estimates.



The average age of an Ealing resident is **38**. This is higher than the median age of Ealing and London residents. Despite this, **20%** of Ealing's residents are under the age of 15, compared **22%** in the borough as a whole.



Ealing is one of the most diverse places in the borough. In 2011, **33%** of Ealing's population was non-white. **16%** are Asian/Asian British and there is evidence to suggest the population is becoming increasingly diverse.



76% of Ealing's population are educated to degree-level (NVQ 4+) compared to **66%** in Ealing and **60%** in London.



10% of Ealing's population have no qualifications compared to **7%** in Ealing, **6%** in London.



5.8% of Ealing's economically active population are claiming benefits. This is slightly lower than the Ealing average which stands at **6.8%**.

EALING'S MAJOR EMPLOYERS (1)



Careys Plc

Construction specialists that deliver a range of civil engineering projects in commercial, residential, educational and leisure sectors.



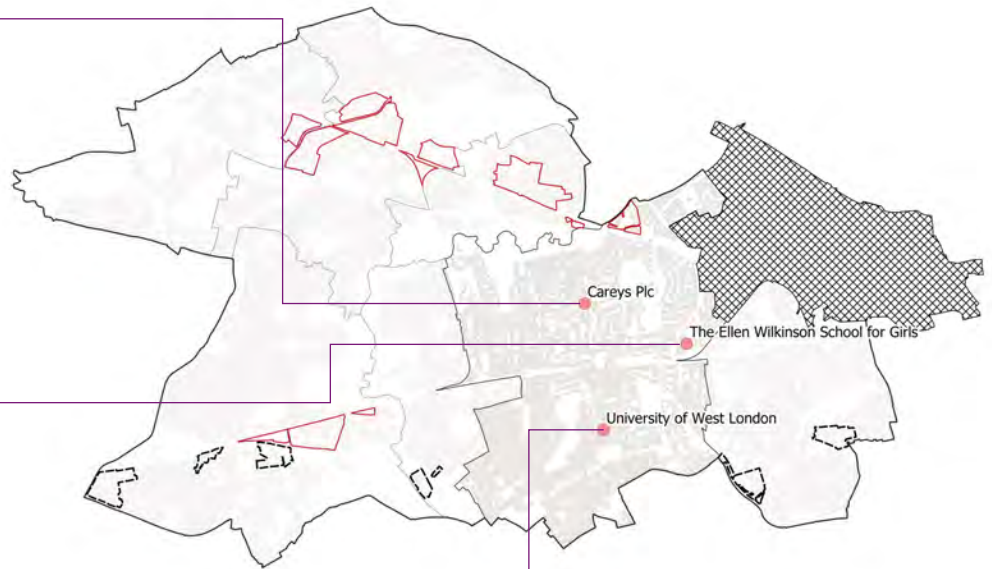
The Ellen Wilkinson School for Girls

General secondary education; comprehensive, foundation secondary school for 1400 girls aged 11 to 19 years.



University of West London

A public research university; first degree level higher education.



EALING'S KEY PUBLIC SECTOR ASSETS



The Solace Centre: A daily out-of-hours mental health resource centre combating loneliness and isolation through social inclusion.



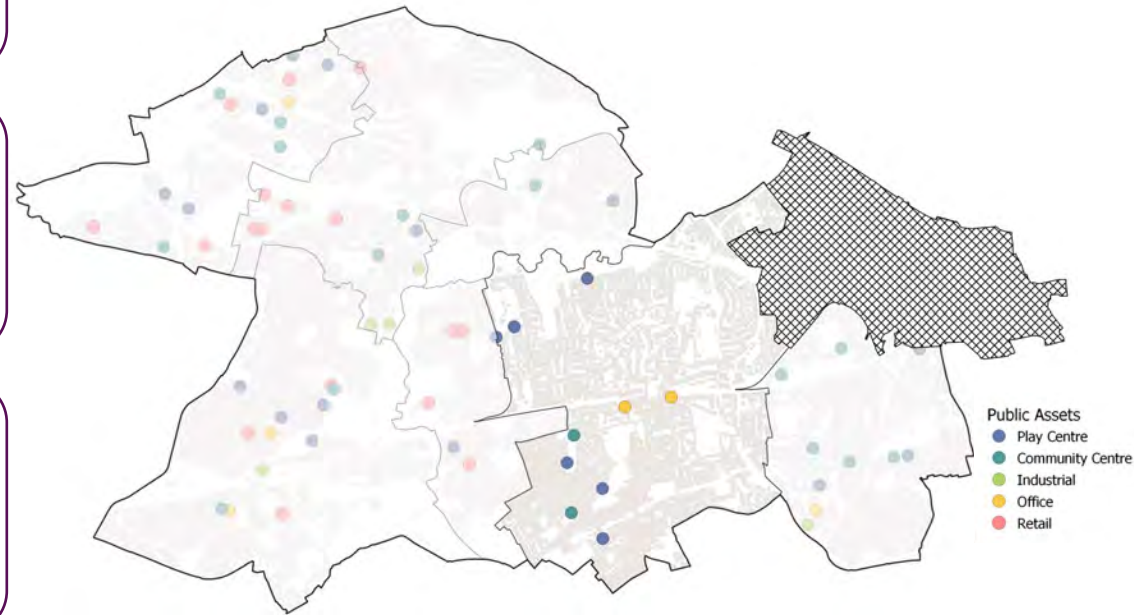
Hathaway Children's Centre: Offers services for families with children aged from 0-5 as well expectant mums and dads, such as antenatal and postnatal clinics.



Lammas Park Play Centre: Formal park of 25 acres on which manor tenants could graze cattle after a harvest in medieval times.



Pitshanger Park Play Centre: A large outside play area with an indoor playcentre.

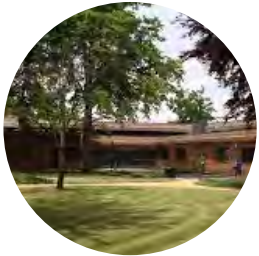


EALING'S KEY PUBLIC SECTOR ASSETS

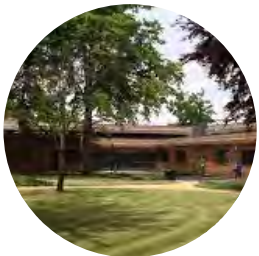


Northfields Community Centre:

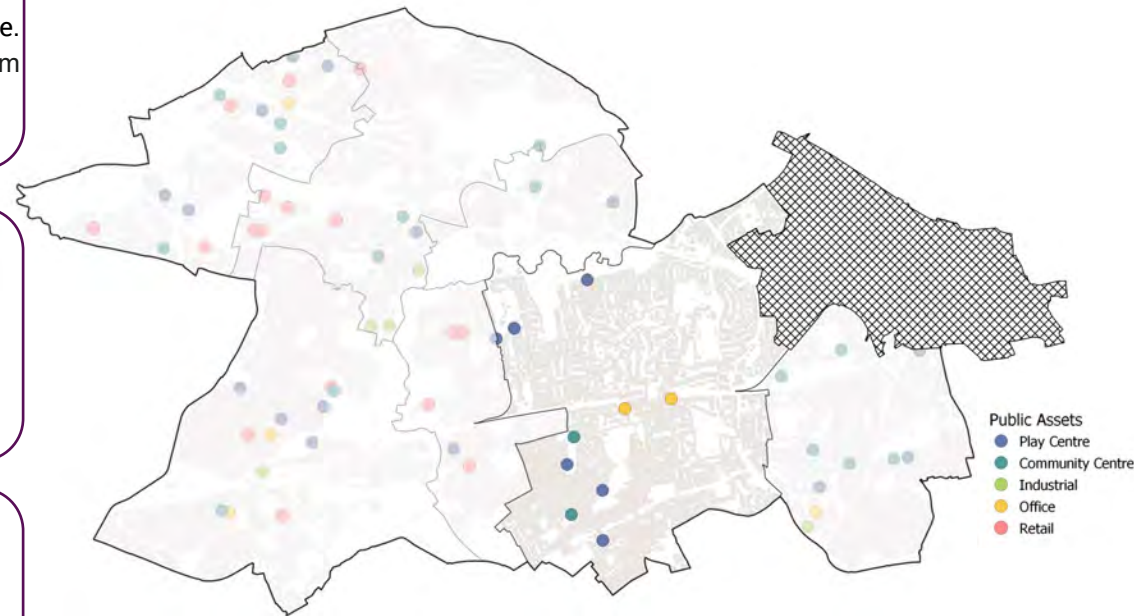
An educational, social and recreational space. Facilities include meeting rooms, a dark room and an outside area.



The Log Cabin Children's Centre: Offers services for families with children aged from 0-5 as well expectant mums and dads. Services include antenatal and postnatal clinic.



Ealing Centre for Independent Living: a membership organisation representing and supporting disabled people.



EALING'S CULTURAL INFRASTRUCTURE



Music Venues: Ealing has a variety of live musical performances venues concentrated around Ealing Broadway. This includes: Plough, Ealing Park Tavern, New Inn, Castle, Grange Court Theatre, Drayton Court, The Red Room, Duke of Kent.



Recording or rehearsal studios: Ealing has 3 location used for rehearsal or recording studios. This includes: Dynasty Records, Kavanagh Management Ltd, Keystone Records Ltd.



Dance studios: Ealing has 3 dance studios spread across the town. This includes: Innovation Dance Studios, Questor's Theatre, West London University.



- Cultural Infrastructure
- Arts centres
 - Cinemas
 - Museums and public galleries
 - Theatres
 - Community centres
 - Libraries
 - Dance performance venues
 - Dance rehearsal studios
 - Music venues
 - Fashion and design
 - Textile design
 - Prop and costume making
 - Jewellery design
 - Pubs
 - Music office-based
 - Music recording studios
 - Music rehearsal studios

EALING'S CULTURAL INFRASTRUCTURE



Jewellery Design: these are business involved in the profession of designing and creating jewellery. This includes: Foley Trading Company & Factory Business Solutions.



Libraries: Ealing has four main libraries that provide audiobooks, music CDs, hosts reading groups, newspaper archives as well as public Wi-Fi and computers for public access. This includes: Northfields Library, Ealing Central Library, Pitshanger Library, West Ealing Library.



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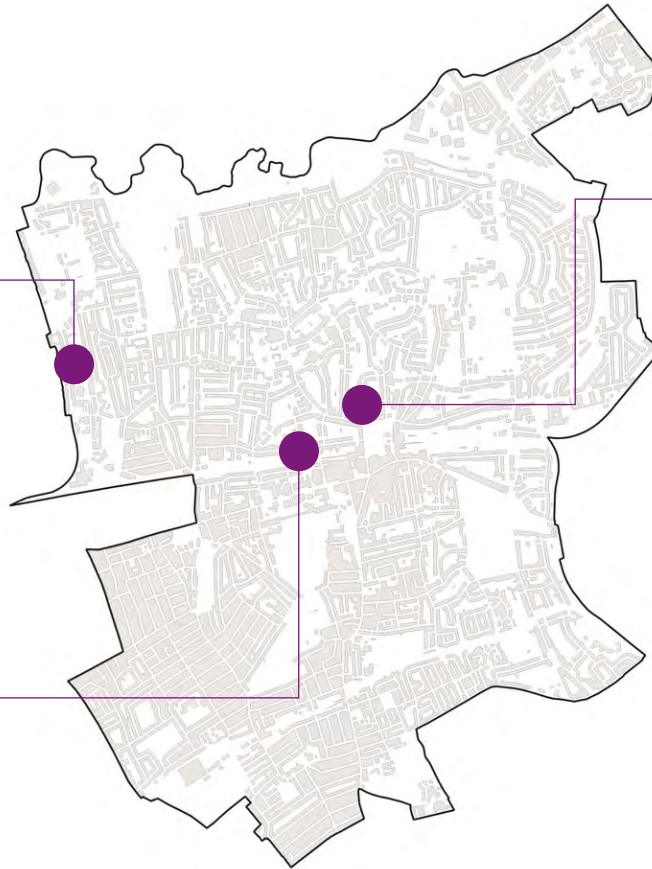
EALING'S MAJOR DEVELOPMENTS

Copley Close Estate Regeneration

1km estate comprising of 637 homes. Regen proposals include demolition of 76 homes, construction of 205 new homes, and extensive refurbishment of over 500 homes.

Perceval House

Redevelopment of the current council offices to provide office, 477 homes, and commercial space.



Broadway Connection

British Land proposals in central Ealing. This includes a mix of office, residential and commercial space development.

CHAPTER 4

TOWN CHALLENGES



WHAT WE'VE HEARD

The first phase of non-statutory engagement on the new Local Plan for Ealing was launched on 10 November 2021 as a suite of activity under the “Shaping Ealing” umbrella. 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 Ealing residents believed to be bad about their local area are presented below:



There was **50%** net disagreement that Ealing has a good range of affordable homes.



There was **4%** net disagreement that Ealing has clean air.



There was **25%** net disagreement people were happy with the way Ealing is changing.

KEY CHALLENGE 1: SHRINKING ECONOMY AND LOSS OF HIGHER VALUE ACTIVITY

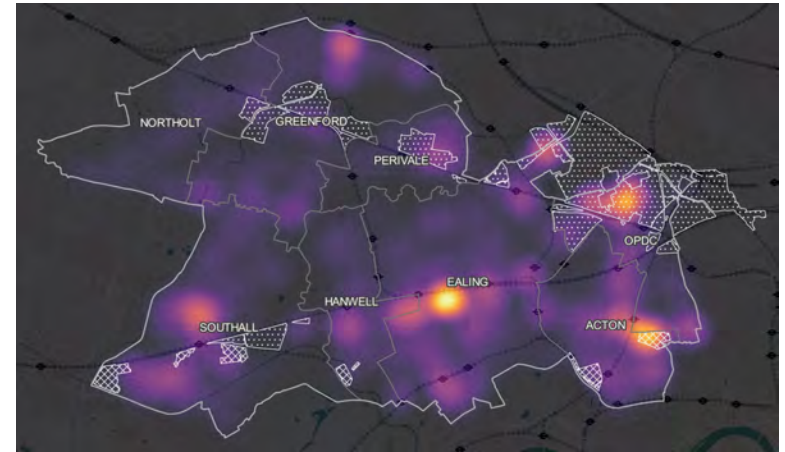
WHAT THE EVIDENCE SHOWS...

Ealing is integral to the borough's economy. However, over the last few years the economy has stagnated and has lost higher value employment.

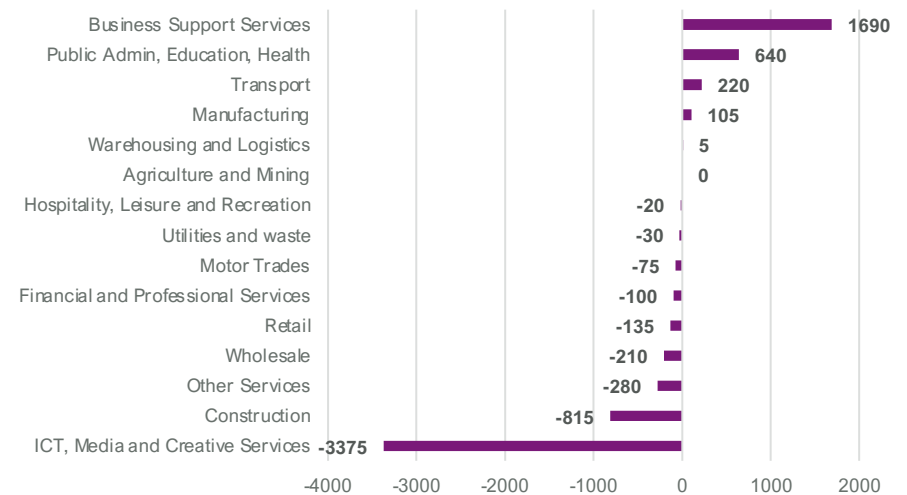
- Ealing hosts 34% of the borough's jobs and 35% of the borough's businesses making its success integral to the local economy. Ealing has the highest quantities of knowledge intensive employment. 4,500 jobs are in financial and professional services, reflecting the importance of the Uxbridge Road corridor in accommodating the borough's higher quality office stock.
- However, Ealing's economy has stagnated in recent years and the town has lost jobs. Since 2015, the number of jobs in Ealing fell by 3%.
- A significant proportion of these job losses are in typically higher paid services such as ICT, Media, and Creative Services which have shrunk by over 3,000 jobs.
- The economy has also been significantly reprofiled, with a big growth in Business Support Services (+1,690). This class includes the provision of a combination of day-to-day office administrative services, such as reception, financial planning, billing and record keeping, personnel and mail services etc. for others on a contract or fee basis.

Sources: Companies House, BRES

Business density, 2021



Employment sector change, 2016-2020



KEY CHALLENGE 2: AFFORDABILITY

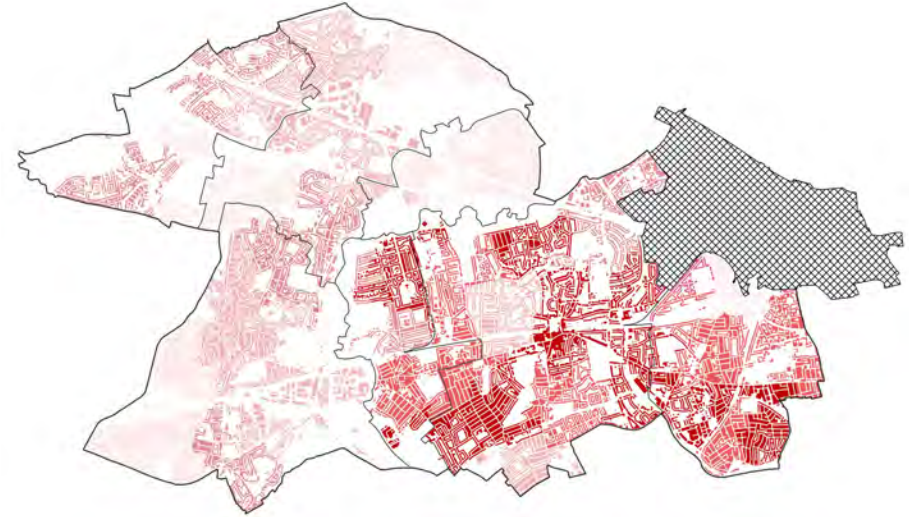
WHAT THE EVIDENCE SHOWS...

Ealing is where the borough's affordability challenges are playing out most visibly. Whilst the cost of housing in the town is well established, the cost of commercial space could also be prohibitive to enterprise – preventing long-term growth.

- Median resident earnings are significantly higher in Ealing than the rest of the borough. In 2018, average earnings stood at £44,500, significantly above the London average.
- Despite this, the cost of housing is still very high. Ealing's median house price was £622,000 in 2018, meaning that the housing affordability ratio was nearing 14 times annual average earnings. Whilst this is the latest available data at town level, it is likely that Ealing will have become increasingly unaffordable over the last three years, with house prices consistently outstripping wage growth.
- Similarly, Ealing is the most expensive town in the borough to do business. The OPDC and Ealing Affordable Workspace Study has been assessing the affordability of starting and running a business in the borough to provide evidence to inform the Local Plan. Evidence from this study showed that office rents in Ealing (£55 per sqft) were significantly higher than the borough average (£47 per sqft).
- Now the Elizabeth Line is fully operational, commercial property experts anticipate rents to rise sharply around Ealing Broadway.

Sources: ONS, ASHE, Volterra Affordable Workspace Study

Housing affordability Ratio, 2018



Average office and industrial rents

Area	Industrial	Office
	Rent	Rent
	(£ per sqft)	(£ per sqft)
Acton sub-area	*	£34
Ealing sub-area	*	£55
Perivale sub-area	*	£32
LBE (excl OPDC)	£26	£47
OPDC	£23	£38

CHAPTER 5

EALING'S OPPORTUNITIES

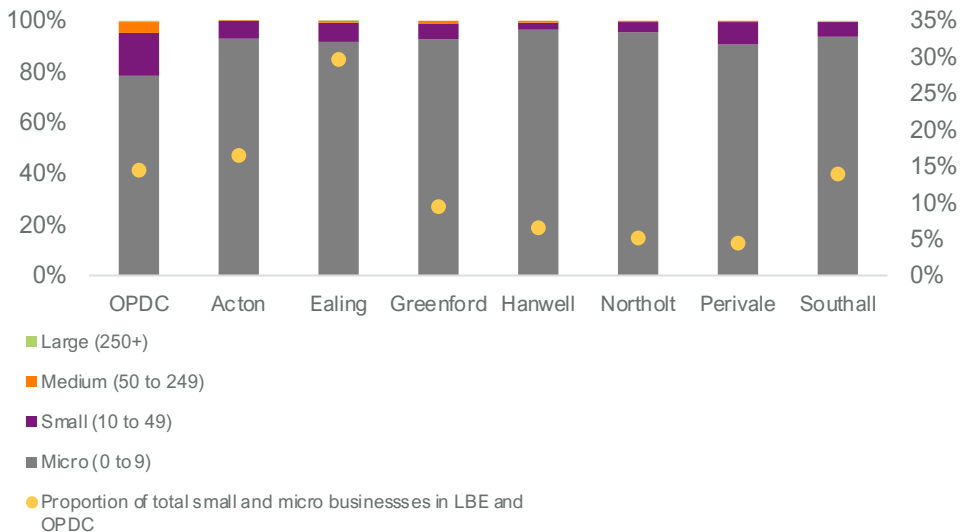
OPPORTUNITY 1: PROVIDING SPACE FOR SMALL BUSINESSES TO SUCCEED

A POTENTIAL PRIORITY COULD BE...

Implementing the recommendations of the Affordable Workspace Study enable local businesses to start, seed and grow in the town.

- Analysis undertaken as part of the Affordable Workspace Study shows that Ealing is already the key driver of the borough's small business economy. 92% of Ealing's businesses have less than 9 employees. Almost a third (30%) of micro and small businesses in the borough are located in Ealing town.
- Therefore, Ealing could provide the spatial focus for exploring how affordable workspace provision can address the increasing cost of enterprise, and address the town's recent decline in a loss of higher value employment. This could include exploring how council assets within the town could be used to support this objective – including on a meanwhile basis (see case study right).

Distribution of businesses, 2021



Case Study 1: International House, Brixton

- 55k sq ft NIA affordable workspace on a Council owned asset (LB Lambeth's former offices in Brixton)
- Workspace operators were appointed through a competitive tender, to deliver a 5-year meanwhile project on an outcomes based lease.
- The project helped to introduce new Creative and Digital organisations to the town centre; providing good local jobs and diversifying high street footfall.
- £1.1m rent to Lambeth over the lease duration (£5 per sq ft)
- International House was also the UK's 1st Living Wage Building. All tenants and the first tier of their supply chain committed to paying a real living wage as part of their lease agreements.



Source: Volterra: OPDC/Ealing Affordable Workspace Study

OPPORTUNITY 2: WORK WITH KEY LAND OWNERS TO DEVELOP SHARED PRIORITIES

A POTENTIAL PRIORITY COULD BE...

Working with key landowners in the town centre to maximise social, economic, and environmental value from one of Ealing's key economic anchors.

- Ealing Metropolitan Town Centre is the commercial and retail centre of the borough. Emerging developments like Broadway connection present the opportunity to generate a critical mass of employment.
- Ealing Broadway is an attractive and convenient mixed-use destination, benefitting from its proximity to Ealing Broadway underground and national rail station.
- Acquired in 2013 by British Land, Ealing Broadway combines over 400,000 sq ft of retail with 130,000 sq ft of offices. Ealing Broadway was refurbished in 2015. The Town Square has now become a hub for community activities such as a monthly artisan market and the Broadway beach in the summer.
- In May 2017, British Land acquired 10-40 The Broadway, a 70,000 sq ft mixed use site, comprising over 20 high street retailers. The combined schemes are located in the centre of Ealing, which is undergoing transformative redevelopment with more than 2,000 new homes planned.
- British Land are already investing wider social value activities. The Town Forum could consider working with British Land to understand how social value from their new and existing portfolio can be maximised to address some of the challenges across the borough.

Case Study 2: British Land CSR Commitments

- As part of their wider commitment to Ealing, British Land have a range of sustainability and ongoing social initiatives to support the local area.
- To date, this has included over 600 people benefiting from their Ealing Broadway community programme in 2021. British Land worked with local schools, employment projects, community partners and customers to make the greatest social impact during the pandemic.
- 2,000 local children have benefited from British Land's Young Readers Programme at Ealing Broadway since 2013. Here, British Land have collaborated with their customers and the National Literacy Trust to inspire a love of reading and improve young people's literacy skills.
- During the pandemic, British Land focused on providing books and educational materials to families in need.



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.