TOWN BRIEFING: NORTHOLT

JUNE 2022

Ealing

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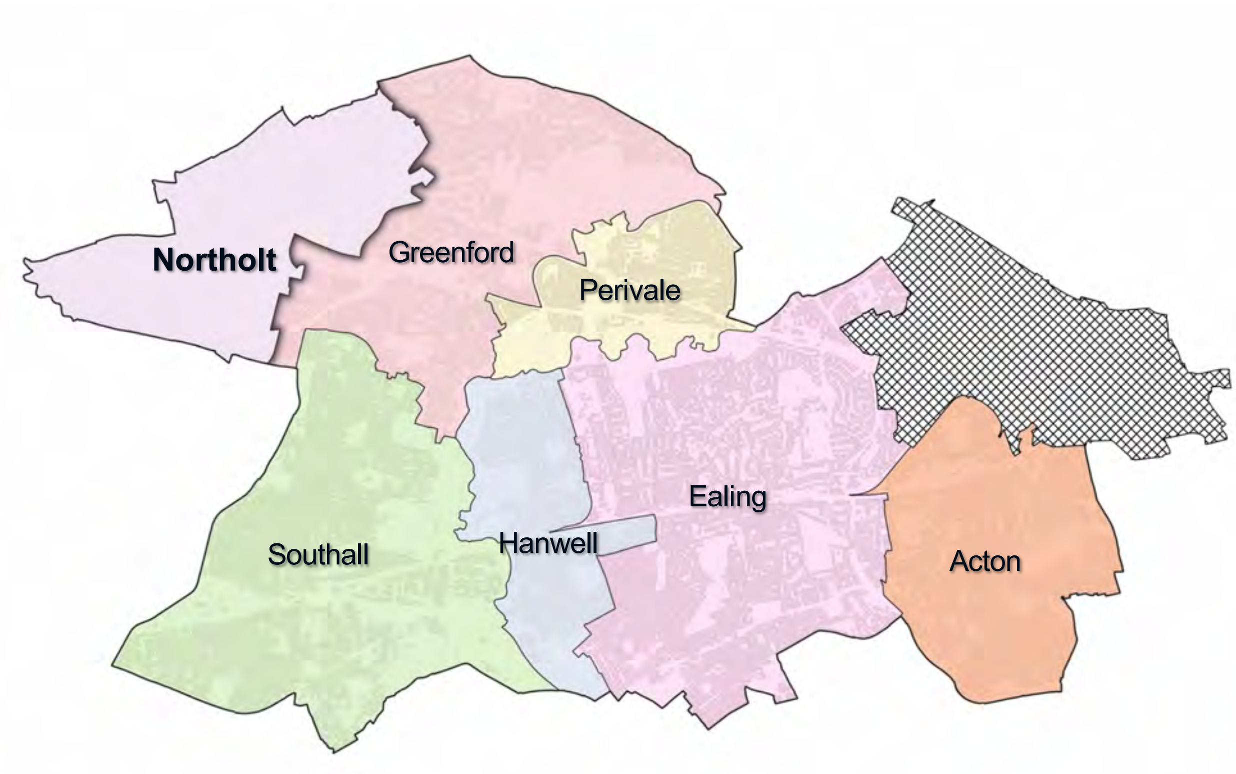
EALING'S SEVEN TOWNS

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 Northolt sub-area.



NORTHOLT TOWN BRIEFING

This Town Briefing provides high-level insight into the socio-economic character and performance of Northolt. It sets out how London and Ealing's economy has changed, before outlining how these factors are shaping prosperity and opportunity in Northolt. The evidence presented here builds on the ongoing Visions for Northolt project which will culminate in a community-led vision for the town – giving the Town Forums strong foundations to build on. 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.

Northolt's Economic Profile

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

Economic evidence shows that Northolt performs poorly against deprivation, earnings, and health indicators. However, Northolt performs strongly against affordability and business growth measures.

Northolt'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 Northolt.

Northolt has a range of community, economic, and cultural assets which are integral to local prosperity. Northolt is also home to beautiful green spaces which provide important social infrastructure and are highly valued by residents.

Northolt's challenges

Chapter 4 focuses on several key local challenges facing Northolt'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 low pay, and a lack of higher value employment, and a lack of underpinning infrastructure to catalyse regeneration.

Northolt's opportunities

Chapter 5 sets out three potential opportunities to explore within Northolt 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 existing local networks and improving the identity and quality of Northolt's industrial areas, and proactive intervention in industrial areas.

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

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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…

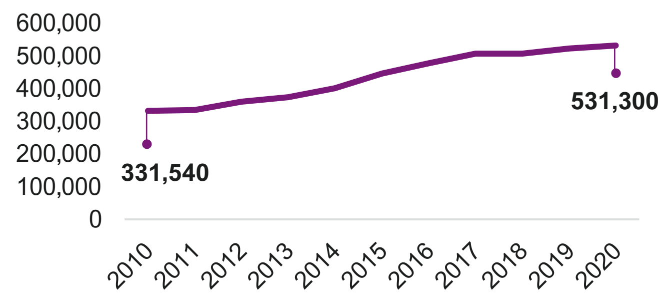
Long-term inequalities have been exposed and accentuated by the pandemic.

This is reinforced by the following indicators:

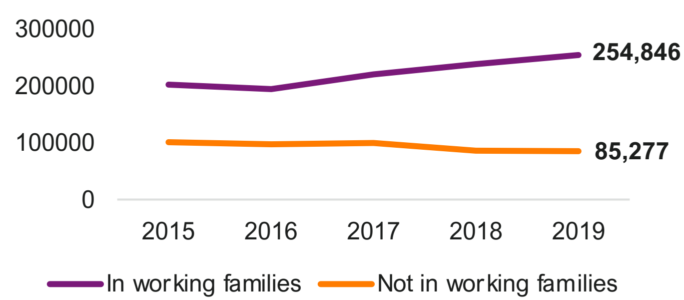
- **Food** – Between 2010 and 2020 the number of Londoners relying on foodbanks has increased from around 12,000 to over 200,000; this has subsequently doubled to over 400,000 since the start of the pandemic (Statista)
- **Work Security** - London saw the biggest decline of PAYE employees of any region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



Source: DWP StatXplore, ONS Business Counts

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	Croydon 37%	Hillingdon 3,455	Lambeth 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

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

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).

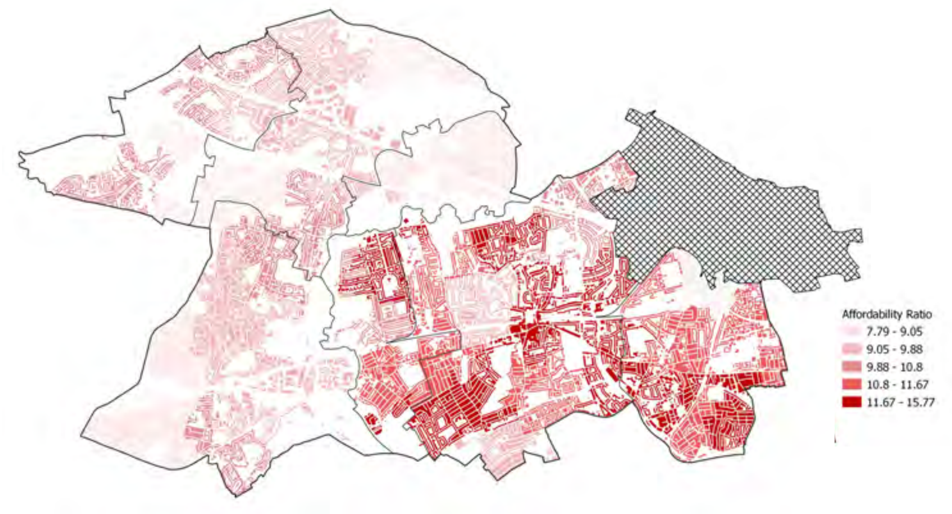
WHAT THE COUNCIL IS ALREADY DOING…

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.

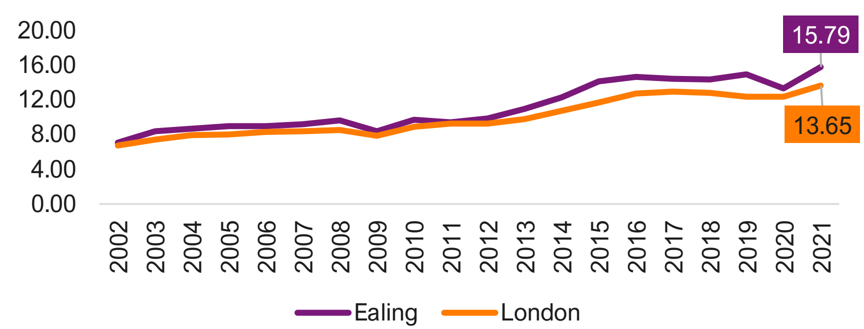
Broadway Living plays an important role in addressing Ealing's housing affordability challenges.

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



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.

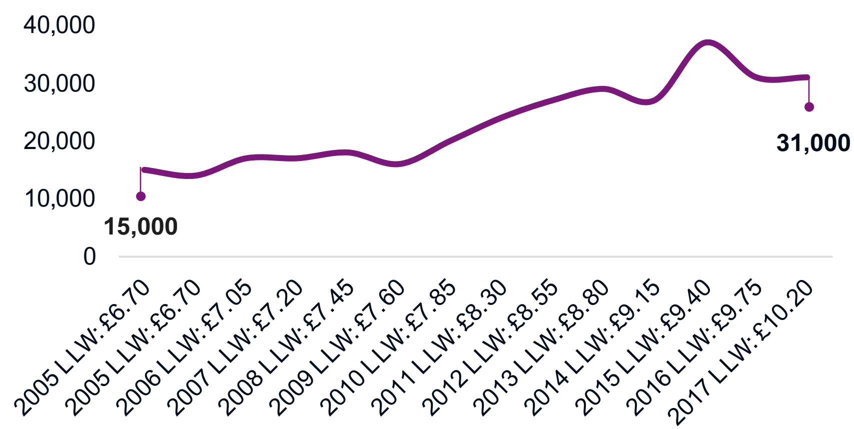
At the start of the pandemic, the council launched its 'Ealing Together' initiative, which inspired over 1,000 local volunteers to be registered and helped the council deliver 14,000 food parcels to shielded and most vulnerable residents. Between April and September 2020, the Council also allocated nearly £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

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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).

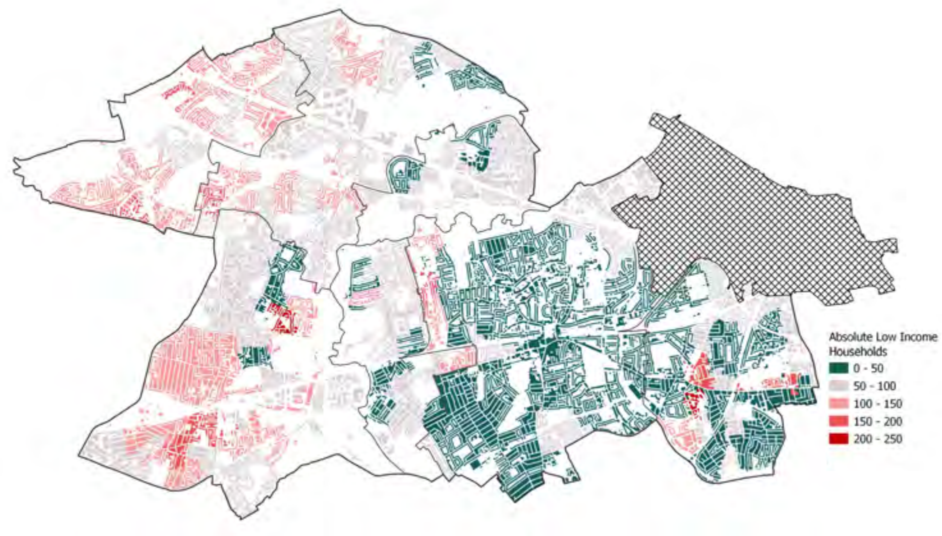
Low earnings, high housing costs, and poor quality work will all affect the economic resilience of households in the short-term as the cost of living crisis continues to bite.

WHAT THE COUNCIL IS ALREADY DOING…

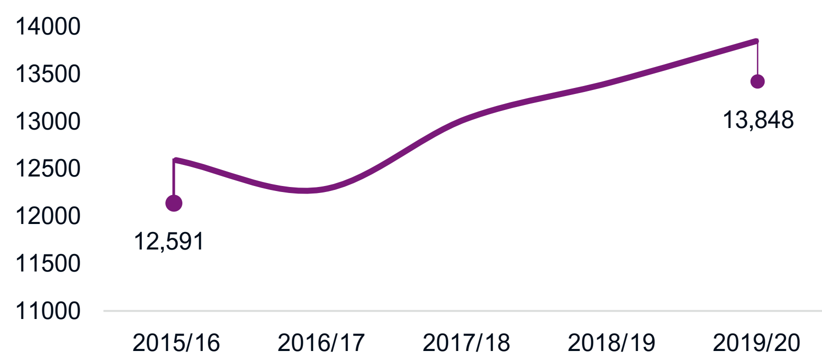
Ealing council is already providing significant additional help to support for residents on low incomes. This includes:

- **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…

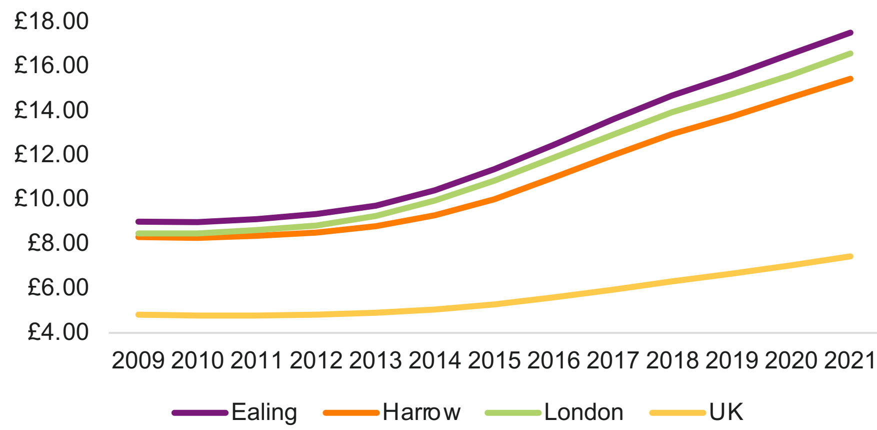
Industrious Ealing will provide the council with the evidence base to proactively shape demand to maximise benefits for its residents.

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.

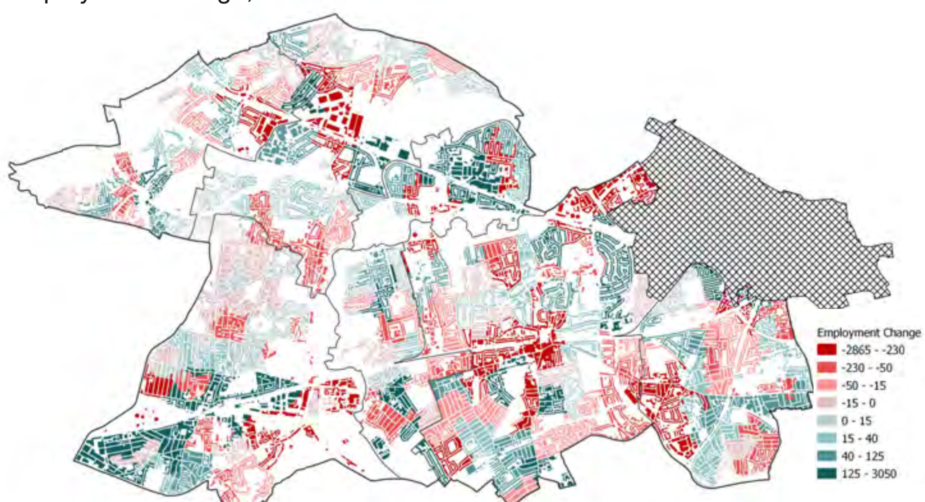
It will also outline the wider levers that the council could consider to maximise Ealing's industrial growth opportunity such as:

- 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

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RESPONDING TO THE EVIDENCE: EALING'S THREE ECONOMIES

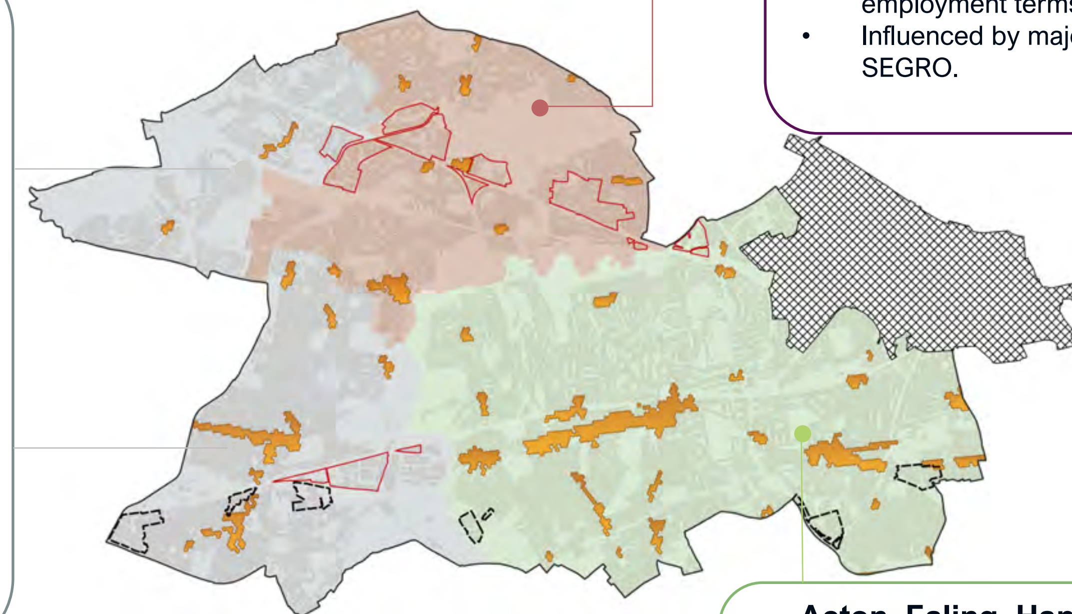
Socio-economic indicators show that Ealing's seven towns can be simplified into three economic geographies, each with their own specific strengths, weaknesses, opportunities and priorities for action. Greenford's economy is intrinsically linked to Perivale and the two sub areas share economic specialisms,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

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.

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.



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 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

NORTHOLT'S HEADLINE ECONOMIC PERFORMANCE

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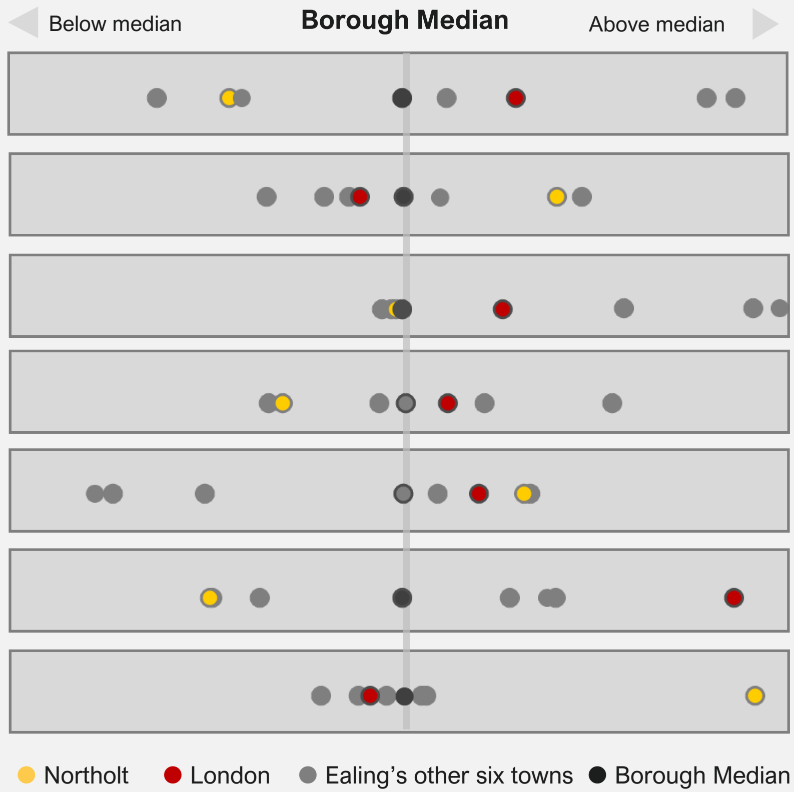
NORTHOLT'S HEADLINE ECONOMIC PERFORMANCE: JOBS AND HOMES



Employment change (2015-2020)

Northolt's employment has changed by -13% since 2015. This is below the borough median ranking **5th** out of the 7 towns

% of jobs in typically low paying sectors

50% of Northolt's jobs are classified as low pay work. This is the second highest proportion of all of the borough's towns.

Median house price

Northolt's median house price was £413,200 in 2018. This is below the borough median ranking **6th** out of the 7 towns

Median resident earnings

Northolt's median resident earning was £31,750 in 2018. This is below the borough median ranking **6th** out of the 7 towns

Housing affordability

Northolt's affordability ratio is 12 times average income. Northolt is therefore the joint most affordable of Ealing's seven towns.

% of jobs in knowledge intensive industries

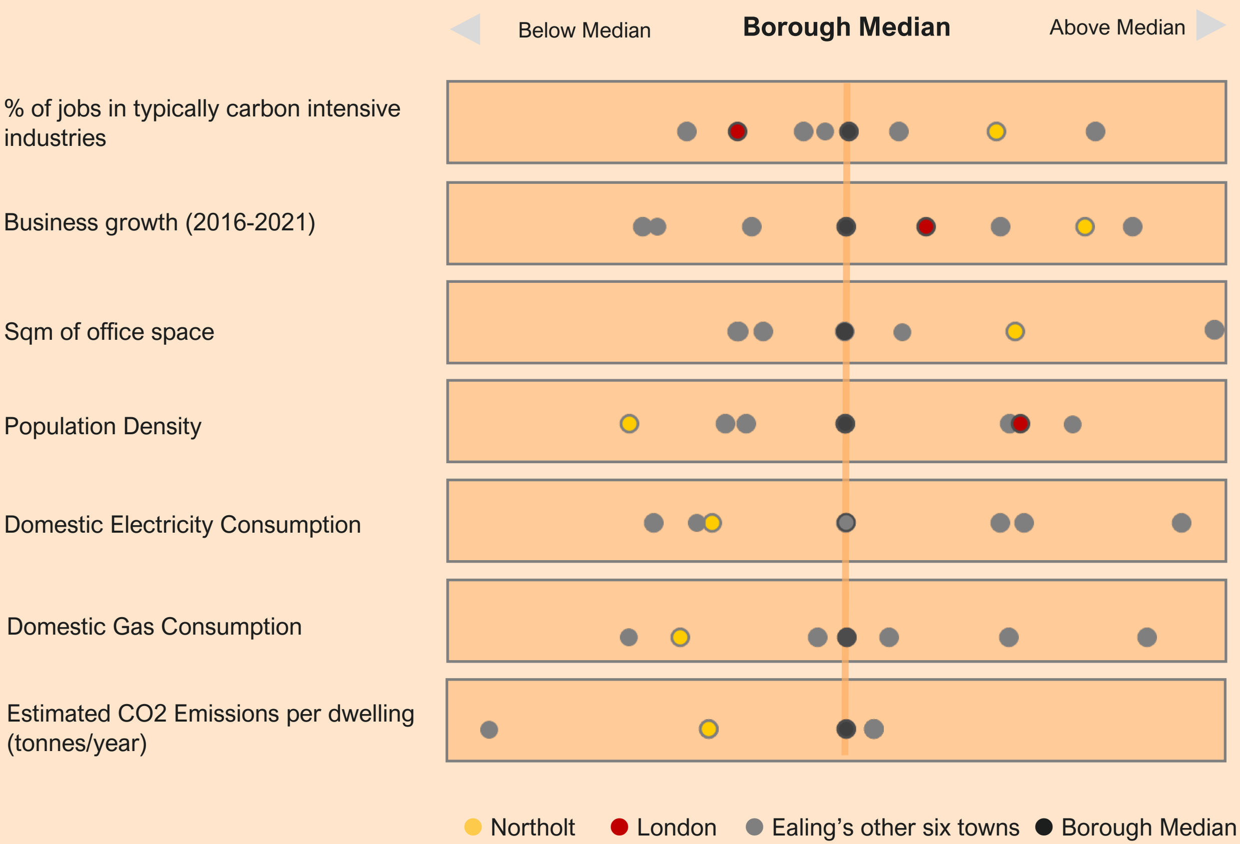
6% of Northolt's jobs can be classified as knowledge intensive. This is below the borough median ranking **7th** out of the 7 towns

% of jobs in retail

25% of Northolt's jobs are in the retail sector. This is above the borough median ranking **1st** out of the 7 towns

Sources: BRES, Business Counts, ASHE

NORTHOLT’S HEADLINE ECONOMIC PERFORMANCE: ENVIRONMENT AND ECONOMY



36% of Northolt’s jobs are considered to be carbon intensive. This is above the borough median ranking **2nd** out of the 7 towns

Northolt’s businesses have grown by 18% since 2015. This is above the borough median ranking **2nd** out of the 7 towns

16% of Northolt’s employment land is classified as office space. This is above the borough median ranking **2nd** out of the 7 towns

Northolt’s population density is 51 persons per hectare. This is below the borough median ranking **7th** out of the 7 towns

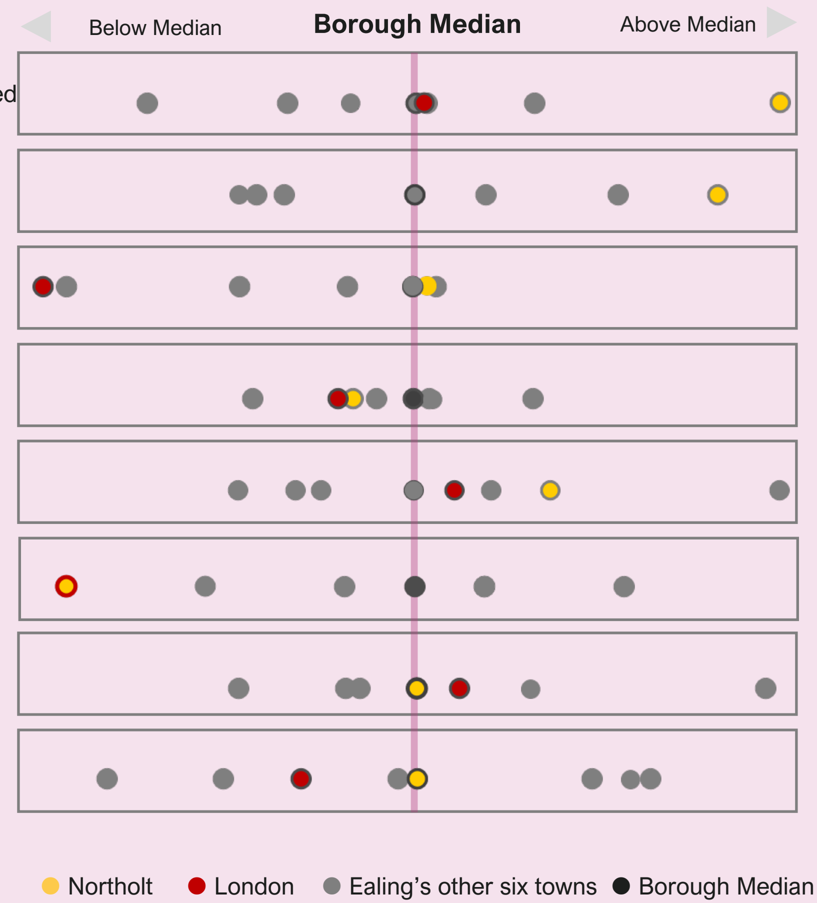
Northolt’s median electricity consumption is 2691.53 kWh per meter. This is below the borough median ranking **5th** out of the 7 towns

Northolt’s median gas consumption is 11788.68 kWh per meter. This is below the borough median ranking **6th** out of the 7 towns

Northolt’s median dwelling emits 2.9 tonnes of CO_2 per year. This is below the borough median ranking **6th** out of the 7 towns

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

NORTHOLT'S HEADLINE ECONOMIC PERFORMANCE: EQUALITY AND PEOPLE



% of LSOAs in top 20% most deprived nationally	40% of Northolt's LSOAs are in the top 20% deprived nationally. This is above the borough median ranking **1st** out of the 7 towns
% of children living in absolute low income families	As of 2020/2021 there were 720 relatively low income households. This is above the borough median ranking **1st** out of the 7 towns
Claimant as proportion economically active 16+ (Feb '22)	Northolt's proportion of 16+ receiving claimant benefits is 6.2%. This is above the borough median ranking **2nd** out of the 7 towns
Claimant count increase vs the start of the pandemic	Northolt's claimant count increase since the start of the pandemic is 84%. This is above the borough median ranking **6th** out of the 7 towns.
% in bad or very bad health	5.4% of Northolt's population are in bad or very bad health. This is above the borough median ranking **2nd** out of the 7 towns
Median resident age	Northolt's median age is 35 . This is less than the borough median ranking **7th** out of the 7 towns
Life expectancy male	Northolt's male life expectancy is 78.4. This is equal to the borough median ranking **3rd** out of the 7 towns
Life expectancy female	Northolt's female life expectancy is 84.1. This is below the borough median ranking **4th** out of the 7 towns

Sources: ONS Claimant Counts, PHE, IMD

NORTHOLT'S HEADLINE ECONOMIC PERFORMANCE

STRENGTHS

+ **Strong business growth:** The number of businesses in Northolt has grown by 18% since 2015 – the second highest in the borough. Supporting small businesses to start, survive, and grow within Northolt can help to address the decline in employment over the last five years. Industrial areas are critical to Northolt's economic identity are home to specialisms in manufacturing, wholesale, transport and storage.

+ **Affordability:** Northolt is one of the most affordable towns in Ealing, with a median house price of £413,000. Despite this, responses from the Shaping Ealing consultation undertaken to inform the Local Plan development suggested that a lack of affordable housing was still a key issue for residents.

WEAKNESSES

- **Low Quality Jobs:** Northolt has a high proportion of low paying jobs such as retail. There are also very low quantities of knowledge intensive employment, office provision is limited, and the town lacks a notable commercial centre.

- **Child poverty and claimant count:** Northolt residents are challenged with low income. It the highest number of children living in absolute low income households. 1 in every 6 working-age residents is claiming benefits.

- **High Deprivation:** Northolt has the highest proportion of extreme deprivation in Ealing. 40% of Northolt's neighbourhoods fall within the top 20% most deprived LSOAs nationally.

- **Health Indicators:** A significant proportion of the population are in bad or very bad health. This is higher than the borough median.

CHAPTER 3

NORTHOLT'S ASSETS, STRENGTHS AND USPs

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WHAT WE'VE HEARD

Visions for Northolt is a community-led regeneration programme designed and delivered in partnership with local people. Visions for Northolt is piloting a new model for empowering communities to influence, co-deliver and lead change. The first phase of Visions for Northolt ran from January - August 2021. Over 300 local people took part, including those who live, work, study, visit or run a business in Northolt. The vision is formed of 4 vision pillars:

1. **Led by Northolt: Support the people working to better the community and provide positive foundations for future engagement**
2. **Thriving Northolt: Grow the local economy and high streets to allow Northolt to thrive**
3. **Clean Northolt: Ensure a clean, healthy and resilient Northolt by caring for valuable local resources**
4. **Connected Northolt: Create connections between Northolt's neighbourhoods and to wider areas**

Some of the key things respondents like about Northolt are outlined below:

Key **community assets** that were listed included Northolt Library, Northolt Village Community Centre and Northolt Leisure Centre. Participants stressed the need to maintain these assets for local people. The Village Conservation Area and local heritage features are also highly valued by residents.

Participants highlighted the **value of Northolt's green spaces**, in particular Northala fields. Resident-led walking tours also drew to attention the positive use of green spaces in Northolt, such as cricket and football at the Rectory Park

Local people feel a **strong attachment to Northolt** and many expressed an interest in getting involved in decisions about their local area.

Local organisations are positively impacting the area such as Urban Edible Gardens, run by Northolt resident Dina Tsuro. Dina has been working with Ealing Council to promote healthier eating and urban growing in the more deprived areas of Northolt.

Source: Visions for Northolt

NORTHOLT'S MAJOR EMPLOYERS (1)

Alec Reed Academy

Academy, mixed school for 3 to 19 years old.

Necessity Supplies Ltd

Wholesaler and distributor of pharmaceutical products, supplying to customers throughout Europe.

Belvue School

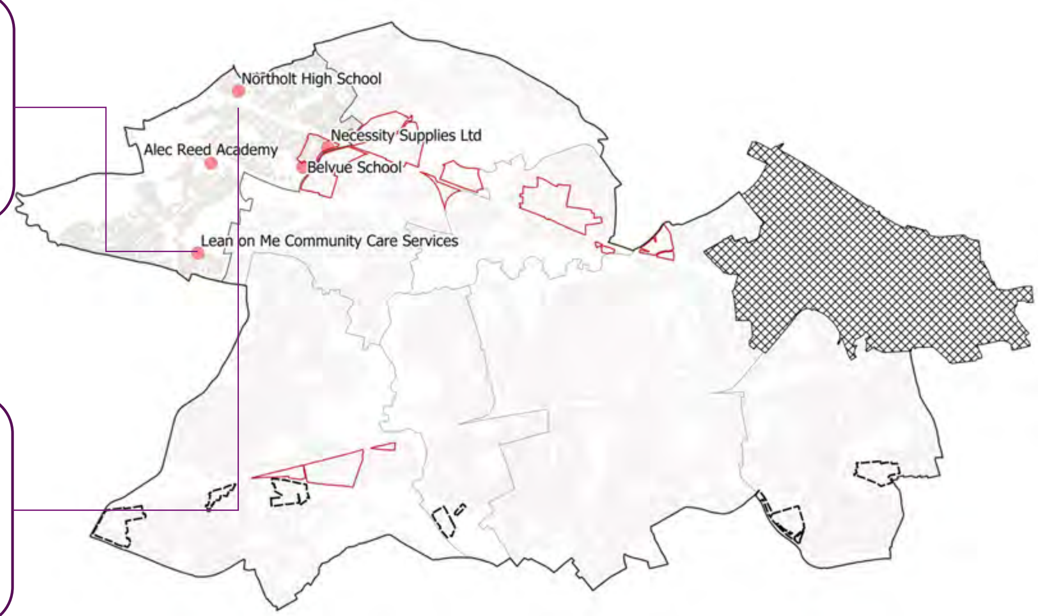
Belvue High School is a special school that caters for the needs of secondary aged pupils with learning difficulties.

NORTHOLT'S MAJOR EMPLOYERS (2)

Lean on Me Community Care Services
Social care such as live-in care, respite and post-hospital discharge, Alzheimer's care and companionship.

Northolt High School

Mixed secondary school catering to aged 11-18.



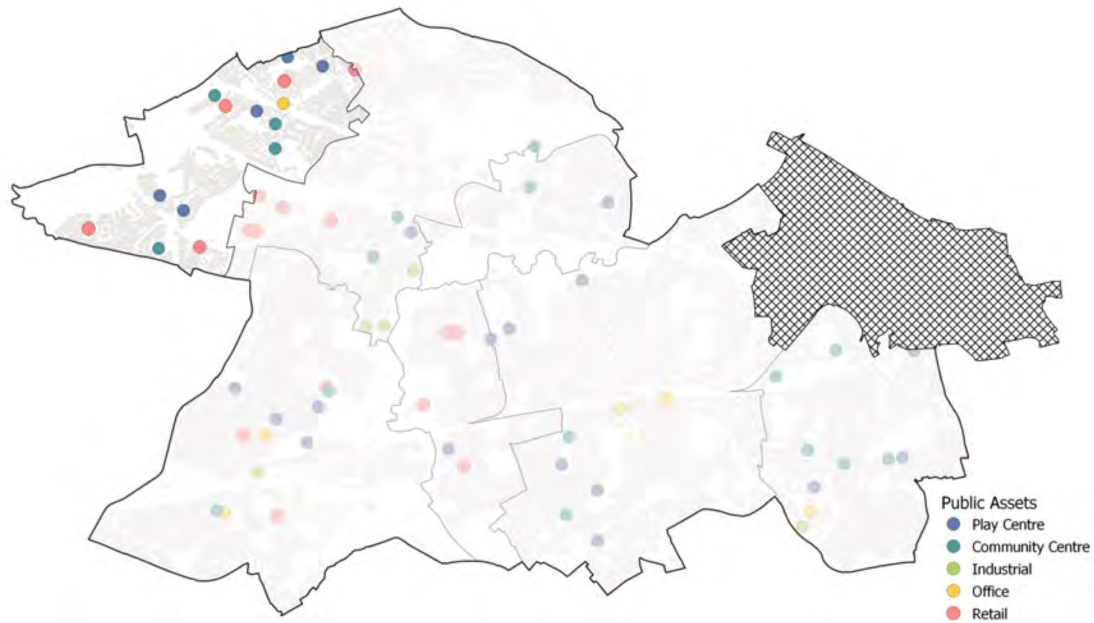
NORTHOLT'S KEY PUBLIC SECTOR ASSETS

Academy Gardens Children's Centre: Working alongside parents, community organisations and professionals to support families.

Islip Manor Children's Centre: stay and plays and antenatal/postnatal services. Offering support services from pregnancy to birth and beyond (0-5yrs).

Lime Trees Children's Centre: Offers services from birth and beyond, focusing on families with children aged 0-5 years.

Northolt Park Children's Centre: Provides services for families with children aged 0-5 years.

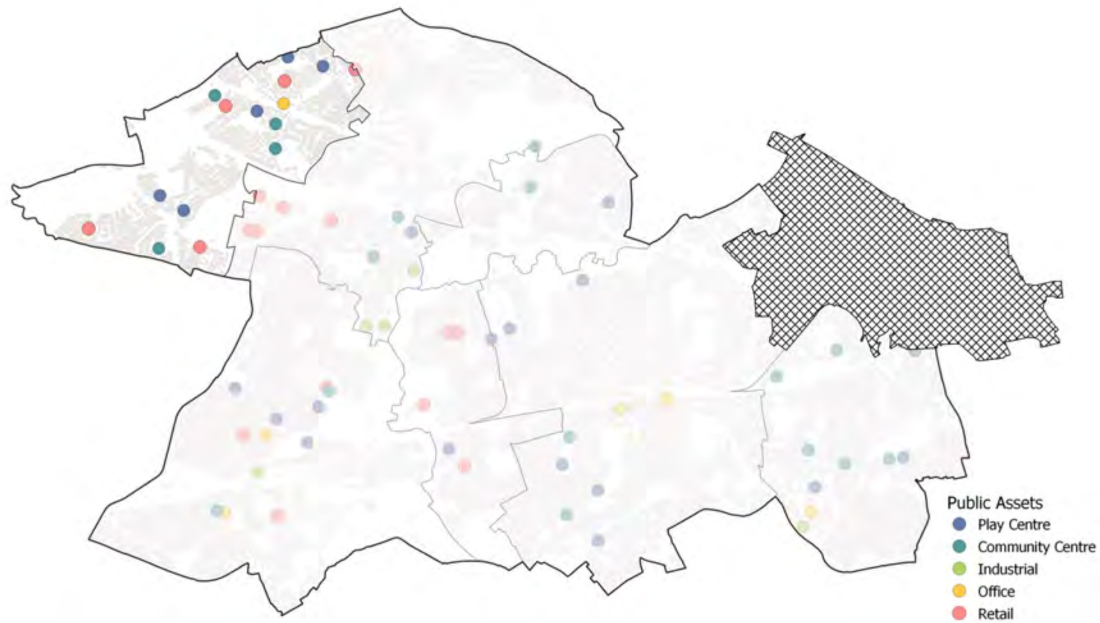


NORTHOLT'S KEY PUBLIC SECTOR ASSETS

Petts Hill Children's Centre: Offers services from birth and later stages, focusing on families with children aged 0-5 years. There is a Full Day Care Nursery on site which provides childcare for children aged six months to five years.

Viking Community Centre: The centre is available for private hire and its function room has a capacity of up to 40 people.

Northolt Village Community Centre: Community centre facilities: centre available for private hire (room in various sizes with capacity to accommodate up to 120 people).



NORTHOLT'S CULTURAL INFRASTRUCTURE

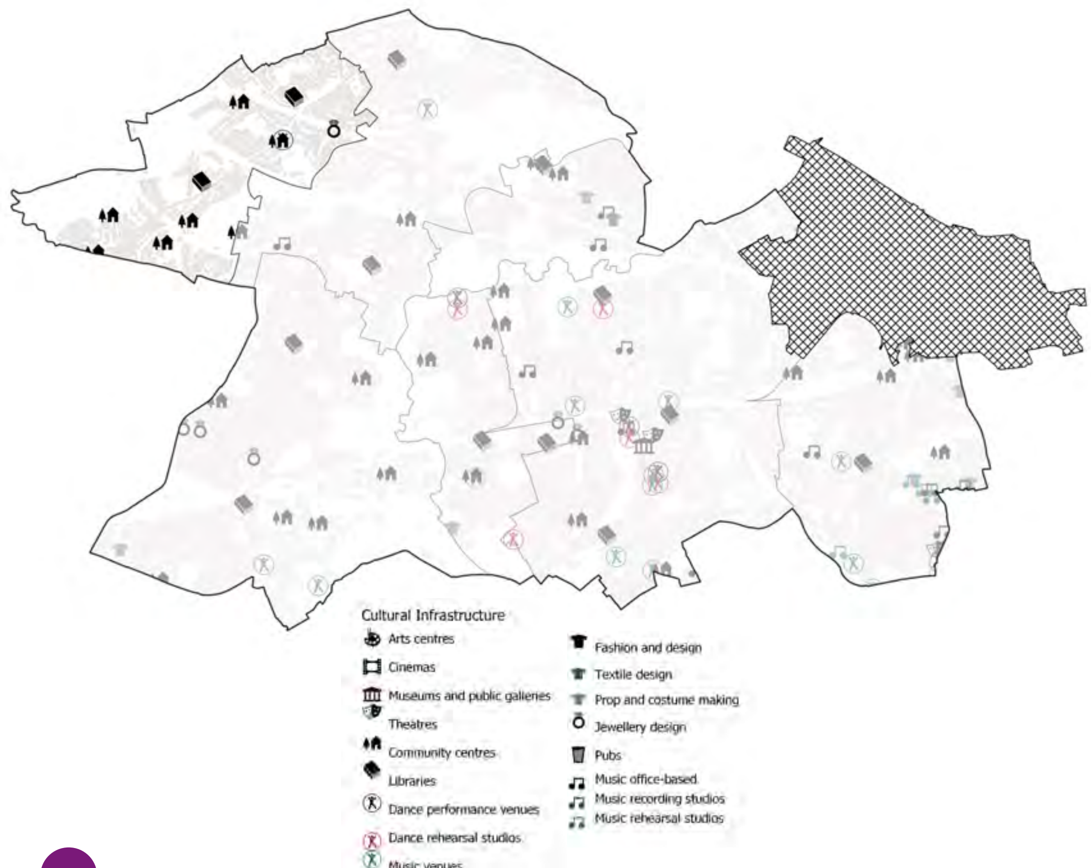
In addition to the physical infrastructure identified below, there are a range of local creatives living in the local area. As part of Visions for Northolt, the project aims to draw these out, bring them together and provide support for them to deliver projects in Northolt. Initial projects will include the Northolt Art Stops and High Street Signage competition. The town's quality green spaces also provide key enabling cultural infrastructure – acting as spaces to host community events.

Libraries: Open to the public, these libraries host a range of events, classes, workshops an courses.

Northolt Leisure Centre Library, Northolt Library

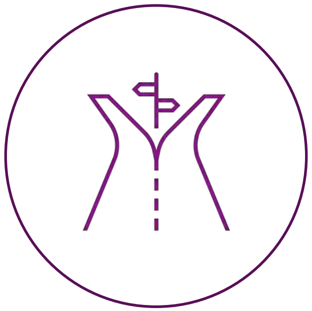
Jewellery Design: these are business involved in the profession of designing and creating jewellery. In Northolt this includes: Gold Garden Limited.

Emerging industrial uses: For example Rubix Drum (based in Belvue Business Centre) have hosted community music workshops in the past.

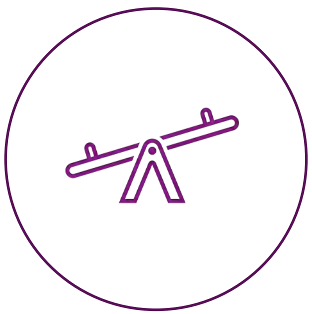


NORTHOLT'S SOCIAL INFRASTRUCTURE

The Visions for Northolt community map highlights community groups and activities in the local area, with the aim to celebrate and promote all that is happening across Northolt. This can be accessed here. A summary of the key social infrastructure considerations, challenges, and opportunities highlighted through the Visions for Northolt project has been included below.



High levels of severance owing to A-roads/ poor active travel infrastructure contributes to social isolation.



Existing **community spaces are considered to be well used** by Northolt residents.

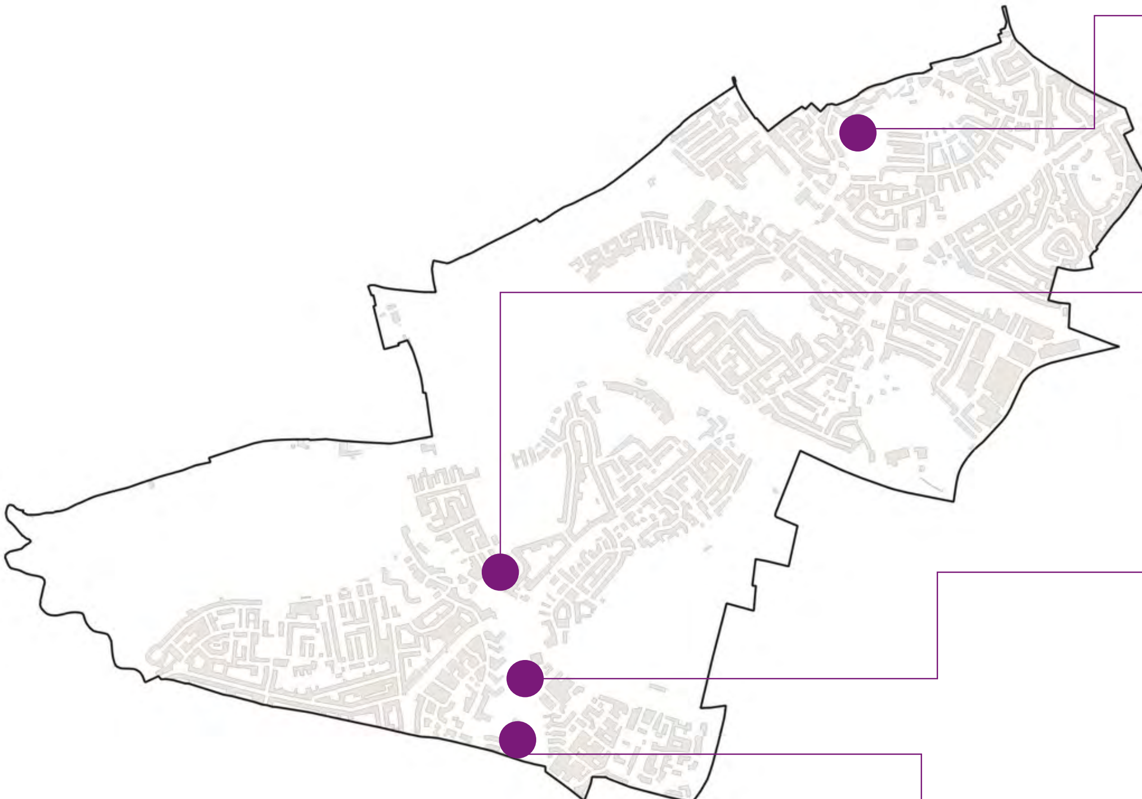
There is **perceived to be a lack of investment in social infrastructure**. People referenced the closure of community centres and other spaces as an example of this.

It is felt that there is a **lack of spaces for young people in Northolt**. This was perceived to be a key contributor to issues with antisocial behaviour across the area.

Some **community spaces have faced challenges** as organisations have struggled to find the capital and resources required to run and retain such facilities.

There are opportunities to better **utilise spaces through community-led action**, with council acting as broker and enabler. For example, the new community kitchen has been set up in Medlar Farm by local group (Building Bridges).

NORTHOLT'S MAJOR DEVELOPMENTS



Land at Dabbs Hill
Planning permission granted for 149 units (118 flats and 31 houses), ranging from two to four storeys in height.

White Hart Roundabout Hotel - TBC
Planning application being developed for a new hotel on the White Hart Roundabout.

Jupiter, Latham And Westland C, Seasprite Close
Under construction. 84 flats and 4 houses. Includes 11 older Person homes, and 33% affordable achieved across the site.

Maple and Poplar Day Centre
Planning permission granted for 34 flats.

Source: Avison Young

CHAPTER 4

TOWN CHALLENGES

Ealing

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WHAT WE'VE HEARD

Visions for Northolt is a community-led regeneration programme designed and delivered in partnership with local people. Visions for Northolt is piloting a new model for empowering communities to influence, co-deliver and lead change. The first phase of Visions for Northolt ran from January - August 2021. Over 300 local people took part, including those who live, work, study, visit or run a business in Northolt. Some of the key challenges outlined through the digital survey are outlined below:

24% said improving public realm, ensuring this is clean, safe, attractive and well maintained. Suggestions included increased urban greening and improved lighting.

37% said improving connectivity, including; public transport; cycling and walking routes; and signage. Many raised the need to address road safety, pollution and congestion issues.

24% said more shared spaces and activities to bring people together, such as community and cultural events for all ages. Suggestions included outdoor markets and better activation of green spaces.

22% said improving high streets and creating a strong local economy with places to eat, work, gather and shop. Suggestions included activating vacant units and attracting a diverse mix of businesses and uses. In the digital survey respondents suggested that creating thriving town centres was a top priority.

Source: Visions for Northolt

NORTHOLT'S POPULATION

Northolt is home to **30,200** people according to the ONS Mid Year Population Estimates.

The average age of a Northolt resident is **35**. This is higher than the median age of Ealing and London residents. Despite this, **26%** of Northolt's residents are under the age of 15, compared **22%** in the borough as a whole.

Northolt is one of the most diverse places in the borough. In 2011, **53%** of Northolt's population was non-white. **63%** are Asian/Asian British and there is evidence to suggest the population is becoming increasingly diverse.

50% of Northolt's population are educated to degree-level (NVQ 4+) compared to **66%** in Ealing and **60%** in London.

23% of Northolt's population have no qualifications compared to **7%** in Ealing, **6%** in London.

8.0% of Northolt's economically active population are claiming benefits. This is higher than the Ealing average which stands at **6.8%.**

Sources: 2011 Census, Annual Population Survey, Claimant Count

KEY CHALLENGE 1: LOW PAY, POVERTY AND DEPRIVATION

WHAT THE EVIDENCE SHOWS…

Northolt is where the borough-wide challenges of deprivation, low pay, and poverty are playing out most visibly.

- The financial resilience of Northolt's residents is likely to be severely tested by the cost of living crisis.
- Earnings in Northolt are the lowest in the borough and are significantly below the London average. Once housing costs are considered, net annual income is 20% 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, almost half (47%) of Northolt's jobs are in low paying sectors.
- These factors are reinforced by high levels of deprivation, and the town has the highest rates of extreme deprivation in the borough. 40% of Northolt's neighbourhoods are within the top 20% most deprived nationally.
- Despite this, provision in terms of arts, culture, employment, skills and adult education is scant versus other parts of the borough.

Key socio-economic indicators for Northolt 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

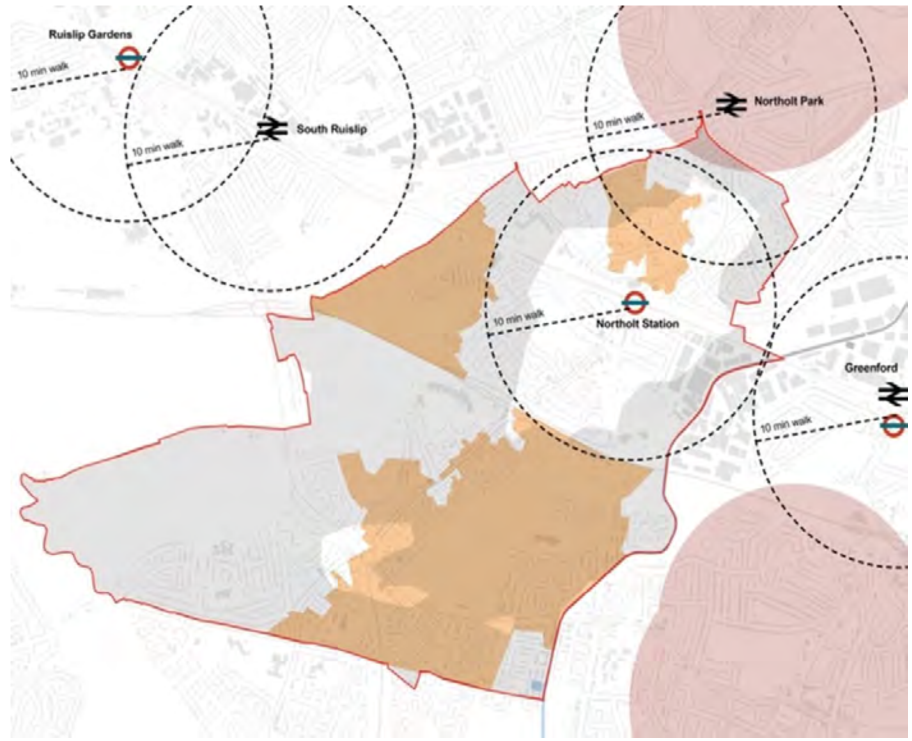
KEY CHALLENGE 2: LACK OF KEY INFRASTRUCTURE TO SUPPORT REGENERATION

WHAT THE EVIDENCE SHOWS...

A lack of underpinning physical and social infrastructure is holding Northolt back. This provides a compelling case for public sector intervention and Ealing has already been successful in securing government regeneration funding.

- An ambitious and radical approach is required to address pre-existing deprivation. Despite the challenging context, there is an opportunity to secure Good Growth for Northolt, however, the supporting infrastructure required to enable good growth and support existing residents is currently missing.
- The Council's 20-minute neighbourhood study has shown that the area suffers from severance and poor connectivity, owing to impenetrable road infrastructure. Northolt is also lacking:
    - Public transport services: many parts of the town are underserved for public transport. Most of the town has a Public Transport Accessibility Level (PTAL) of 2 or less – making these neighbourhoods some of the worst connected places in London.
    - Town centre facilities: town centres in Northolt are small and are dominated by retail.
    - Employment opportunities: see page 34
    - Social infrastructure: As reflected on page 26, Northolt lacks cultural infrastructure compared to other parts of the borough. Additionally, Northolt is underserved for social infrastructure to support residents to be happy, healthy, and well.
    - Active travel infrastructure: LB Ealing was recently successful in securing £7.2m from the Levelling Up Fund with the money going towards transport infrastructure, including improvements to the A312 and Kensington Road corridors.
- Due to the scale of opportunity and critical need for intervention, a coordinated approach is required. Ealing Council is taking a lead role in steering the enhancement and growth of Northolt, facilitating partnership working and empowering local communities to influence and co-deliver change.

Strategic map of Northolt



Source: Northolt 20 Minute neighbourhood Framework

Northolt boundary

Top 20% most deprived area in England (2019)

PTAL 2 or less

Within 800m of District/ Major Town Centre

KEY CHALLENGE 3: LACK OF ECONOMIC DIVERSITY AND HIGHER VALUE EMPLOYMENT

WHAT THE EVIDENCE SHOWS…

The types of jobs hosted in Northolt are typically poor quality and recent growth has under-delivered for residents.

- Northolt has experienced significant employment growth in recent years (+25% since 2015 which is the highest in Ealing). However, the vast majority of this employment growth is within lower paying foundational sectors such as retail – which has increased by almost 1,500 jobs.
- Simultaneously, there is almost no higher value, knowledge intensive employment in the town. Only 5% of jobs are considered to be knowledge economy employment, which is the lowest proportion of any of the seven towns.
- This perpetuated by the local commercial property market. Research from the Northolt 20-minute Neighbourhood study showed Northolt's office market is small. There is only one known office premises in Northolt Central, with two small high street properties in the White Hart Roundabout area.
- Development is also constrained by low land values compared to other parts of the borough. This limits the ability of the local authority to secure S106 to deliver the community infrastructure to benefit local residents.
- Whilst Northolt is better served for industrial space, industrial units are typically poor quality, potentially impacting the type/quality of industrial occupiers.

Northolt's employment profile, 2020

Sector	Absolute Employment Count	% of sector	LQ
Retail	1750	23%	**2.50**
Public Admin, Education, Health	1580	21%	0.80
Transport	985	13%	**4.19**
Wholesale	755	10%	**2.56**
Hospitality, Leisure and Recreation	575	8%	0.79
Construction	475	6%	**1.34**
Manufacturing	310	4%	0.53
Financial and Professional Services	285	4%	0.28
Business Support Services	270	4%	0.43
Warehousing and Logistics	200	3%	**1.29**
ICT, Media and Creative Services	170	2%	0.37
Motor Trades	120	2%	0.91
Other Services	50	1%	0.44
Agriculture and Mining	0	0%	0.00
Utilities and waste	0	0%	0.00
	7525		

Sources: ONS, BRES, IMD, Avison Young

CHAPTER 5

NORTHOLT'S OPPORTUNITIES

Ealing
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OPPORTUNITY 1: TOWN CENTRES

NORTHOLT'S MAJOR OPPORTUNITY IS…

A new Commercial Centre at White Hart Roundabout and enhanced Commercial Centre around Northolt Underground Station will bring much needed employment, retail, social, leisure and cultural uses to Northolt. New and enhanced active travel and public transport infrastructure will better connect residents to these centres and wider employment opportunities.

Key objectives:

- Provide new and diverse commercial uses to meet local demand, capitalising on increased local expenditure compared to pre-pandemic levels.
- Address under provision of leisure and culture uses to grow the visitor, evening and night-time economy.
- Address under provision of employment, skills and adult education uses to build an inclusive local economy.
- Create neighbourhood workspace catering to different sectors, including space for business start-ups.
- Promote sustainable, healthy and active travel and reduce dominance of A-roads, addressing local concerns about congestion, safety and pollution. Better connect residents to commercial centres and wider employment areas through high quality public realm.

OPPORTUNITY 2: EXISITNG LOCAL NETWORKS, ENGAGEMENT AND AMBITIONS TO DRIVE CHANGE

A POTENTIAL PRIORITY COULD BE…

The Visions for Northolt project will deliver a community-led vision for the future of the town. The feedback will enable the community and the council to develop a shared vision for the future of Northolt and set some guiding principles for investment. The Town Forums could seek to build on this by exploring options involve residents in running key community assets to better meet local need.

- A key objective of the Visions for Northolt commission is to empower local people to influence, co-deliver and lead change by celebrating existing local activity and recognising this as a critical starting point for future proposals in and around Northolt.
- Visions for Northolt engagement found that there are a number of active community groups in Northolt. These groups are integral to the area's social, cultural, and economic identity, and central to the success of any future community engagement or projects.
- 24% of respondents to the Visions for Northolt digital survey wanted more shared spaces and activities to bring people together, such as community and cultural events for all ages. Suggestions included outdoor markets and better activating green spaces. The Towns Forums could seek to engage local community organisations to understand the potential for greater community involvement in running/operating key local assets, including the potential for community asset transfer.
- Community asset transfer involves transferring the ownership of land or buildings from a statutory body to a community organisation at 'less than best consideration' – that is at less than its full market value – in order to achieve a public benefit (Local Government Association).
- Transfer to a local community organisation can unlock community enterprise, volunteer commitment, local intelligence, and risk capital to test new approaches and opportunities.

Case Study 1: Oval Bandstand and Lawns, Margate

- In 2021, Thanet District Council transferred the ownership of the Victorian Oval Bandstand and Lawns in Margate to a resident-led Community Interest Company.
- This has provided the local organisation (GRASS) with a permanent home. From the venue, GRASS run a range of community-focused events and programmes ranging from outdoor cinemas, to a sensory garden, to fitness classes.
- To support their application, GRASS produced a comprehensive five-year business plan, demonstrating how the venue will be self-sufficient without additional local authority funding.
- Thanet District Council were successful in securing Towns Fund investment to reinvigorate the Oval Bandstand and lawns – improving facilities for visitors and enable GRASS to scale their activities.

OPPORTUNITY 3: IMPROVING THE IDENTITY AND QUALITY OF NORTHOLT'S KEY ECONOMIC ASSET

A POTENTIAL PRIORITY COULD BE…

Northolt's industrial areas are key to the town's economy. However, the quality and density of on-site employment means that its potential is not being fulfilled. The Town Forums could explore working with local businesses to understand how the quality and identity of Northolt's estates could be strengthened, and relationship with surrounding residential areas improved.

- Research undertaken by Avison Young showed that employment density on the Northolt Trading Estate is low, particularly versus other industrial clusters in the borough. This means that more could be done to increase the number of jobs hosted in Northolt.
- In the Visions for Northolt consultation, 28% said creating new jobs and training opportunities for local people of all ages was a key local need. Respondents highlighted the need to create local employment opportunities by attracting new employers to the area.
- Avison Young's socio-economic research also suggested that the commercial area lacks an identity, brand and attractive business environment. To address this, one potential option could be to establish west London's first industrially-focused Business Improvement District.
- Business Improvement Districts are business led partnerships which are created through a ballot process to deliver additional services to local businesses. They can be a powerful tool for directly involving local businesses in local activities and allow the business community and local authorities to work together to improve the local trading environment.

Case Study 2: London Riverside BID

- The London Riverside Business Improvement District (BID) is London's largest industrial improvement district.
- The London Riverside BID are protecting this industrial area as an important employment zone, where traditional and new business models can co-exist; and where established firms and start-ups can collaborate and innovate.
- Priorities for the BID include helping firms gain insight in to the ongoing relevance of sustainable business practices and the circular economy, and increasingly build sustainability into business practices.

OPPORTUNITY 4: CONSIDER ACTIVE INTERVENTION TO PROTECT ECONOMIC VITALITY

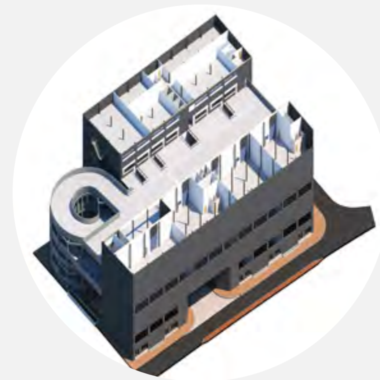
A POTENTIAL PRIORITY COULD BE…

In addition to working with existing landowners, there is potential for the public sector to take a more proactive role in delivering change in industrial areas and the local economy.

- Northolt contains a significant proportion of Ealing's protected industrial land and this is where the majority of the town's economic activity is concentrated.
- However, the council's ability to influence the types of uses on Strategic Industrial Land (SIL) through planning is limited as this is set by the London Plan. SIL policy is effectively fixed by the London Plan and there is relatively little that we can do to either accommodate forms of mixed intensification or set preferences for specific types of industrial use.
- Therefore, where opportunities exist, Ealing Council may want to consider options to become an active market shaping role to address some of the market failures identified through Industrious Ealing. This could include exploring where the public sector has existing land ownership, or though strategic acquisitions .
- Across Northolt, there are 30+ opportunity sites and high levels of public sector ownership offers the opportunity to explore opportunities around industrial intensification and increasing employment opportunities in the town.

Case Study 3: Industria, Barking

- Located on a brownfield site zoned for industrial use in Barking and Dagenham, Industria represents an innovative and ambitious approach to modern industrial design.
- Be First is a to deliver a building that densifies and diversifies the space in a move away from the traditional typology of single-storey, low density 'sheds'.
- The building will deliver around 10,000sqm of industrial space across 45 SME and Flatted Factory units of varying scales, achieved through stacking vertically and, importantly, providing vehicular access to upper floors by a helical van ramp that will allow tenants to service their businesses directly.



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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