TOWN BRIEFING: PERIVALE

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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 Perivale sub-area.
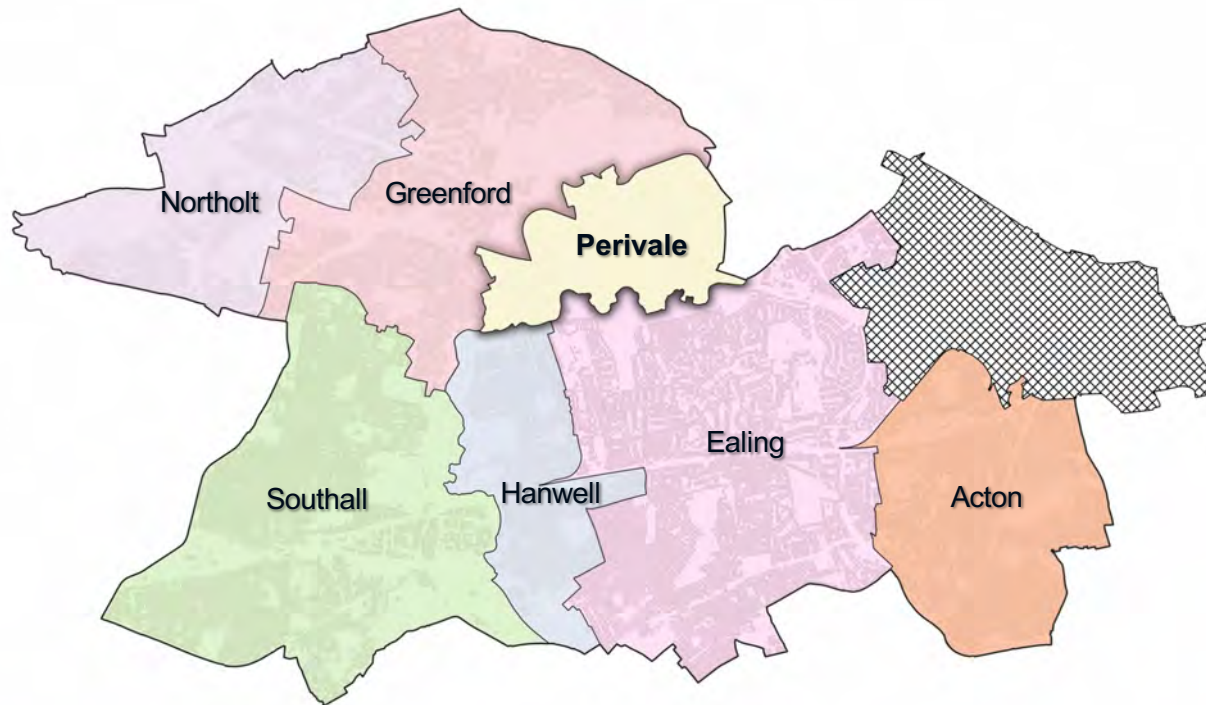
PERIVALE TOWN BRIEFING

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 Perivale. 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.

Perivale's Economic Profile

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

Economic evidence shows that Perivale performs poorly against environmental and COVID-19 impact indicators. However, Perivale performs strongly against quality of work, deprivation, and health metrics.

Perivale'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 Perivale.

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

Perivale's challenges

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

Key challenges include low pay, poverty, and deprivation, and the town centre environment.

Perivale's opportunities

Chapter 5 sets out three potential opportunities to explore within Perivale over the next four years. Drawing on national 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 improve visitor experience along retail parades, and establishing effective partnerships with the private sector to deliver shared objectives.

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.

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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

531,300

331,540
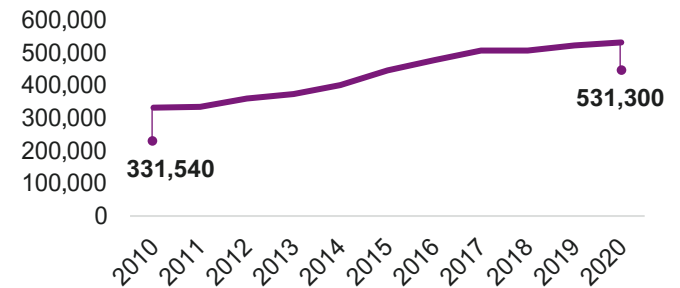
Change in children in absolute low income households by parental work status in London, 2015-2019

254,846

85,277

In working families ——— Not in working families
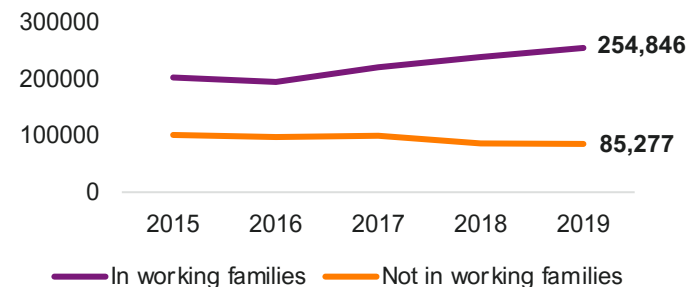
EALING'S PERFORMANCE IN LONDON: JOBS AND HOMES

	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

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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%				

Ealing
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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

Affordability Ratio
7.79 - 9.05
9.05 - 9.88
9.88 - 10.8
10.8 - 11.67
11.67 - 15.77
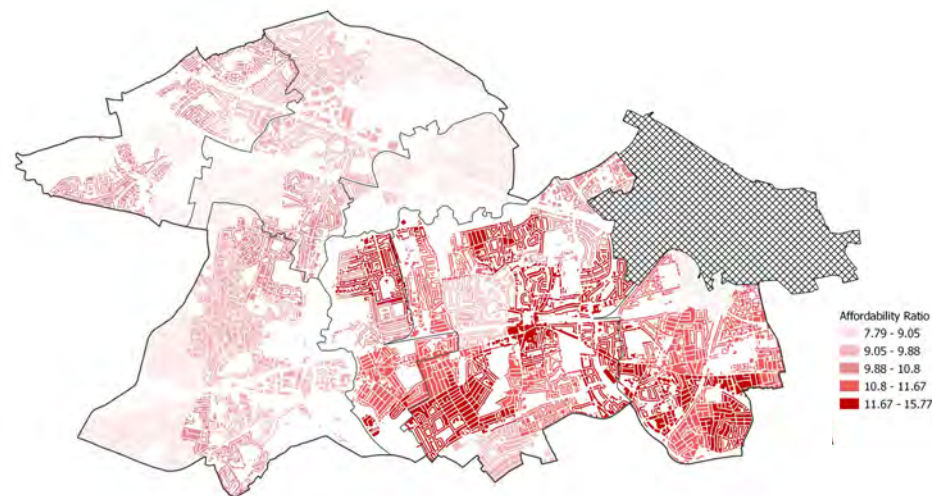
Housing affordability Ratio, 2002-2021

Source: ASHE, ONS
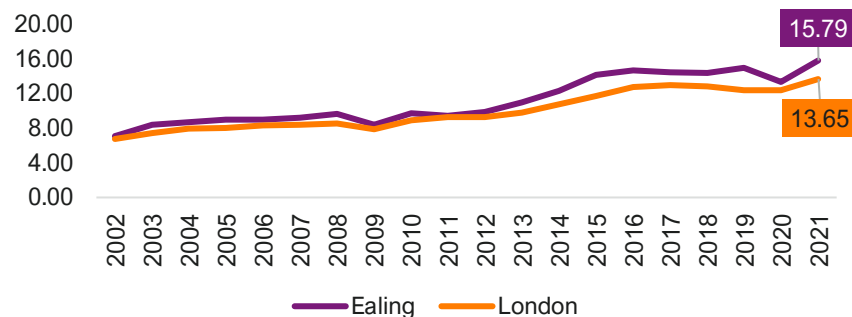
FACTORS SHAPING PROSPERITY: QUALITY OF WORK

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.

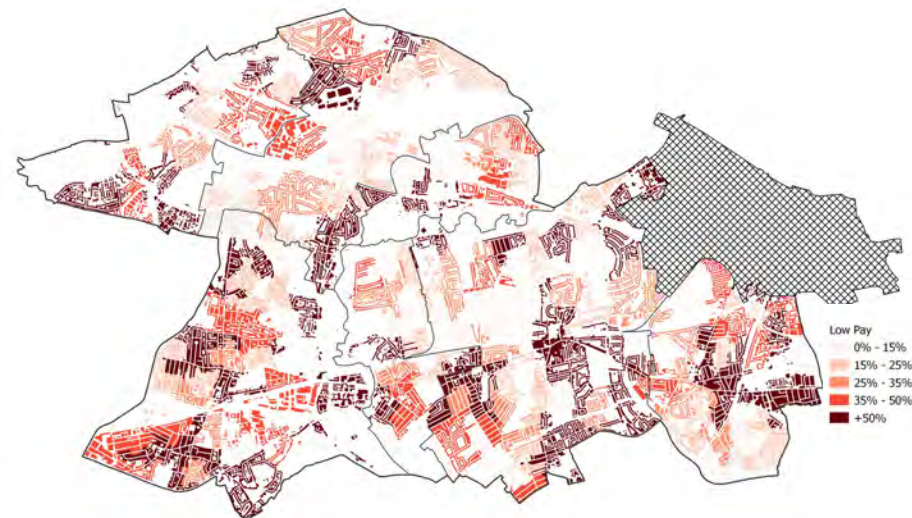## WHAT THE COUNCIL IS ALREADY DOING…

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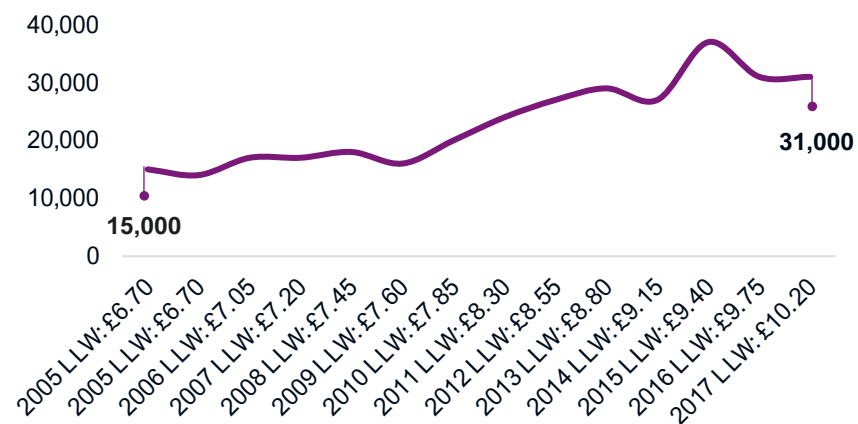
The Council's Plan for Good Jobs (see page 12) includes ongoing economic priorities for the next 12 months.

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

Low Pay
- 0% - 15%
- 15% - 25%
- 25% - 35%
- 35% - 50%
- +50%

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

15,000

31,000

2005 LLW: £6.70
2005 LLW: £6.70
2006 LLW: £7.05
2007 LLW: £7.20
2008 LLW: £7.45
2009 LLW: £7.60
2010 LLW: £7.85
2011 LLW: £8.30
2012 LLW: £8.55
2013 LLW: £8.80
2014 LLW: £9.15
2015 LLW: £9.40
2016 LLW: £9.75
2017 LLW: £10.20

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Source: DWP StatXplore

FACTORS SHAPING PROSPERITY: POVERTY

WHAT THE DATA SHOWS…

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

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

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

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

This is evidenced by the fact that in-work poverty is on the rise. Over the last few years, the borough has experienced an increase in children living in absolute low income households. An individual is in absolute low income (or absolute poverty) if they are living in households with income below 60% of the 2010/11 median, uprated for inflation. By using an income threshold that is fixed in time, this measure looks at how living standards of low-income households are changing over time (House of Commons Library).
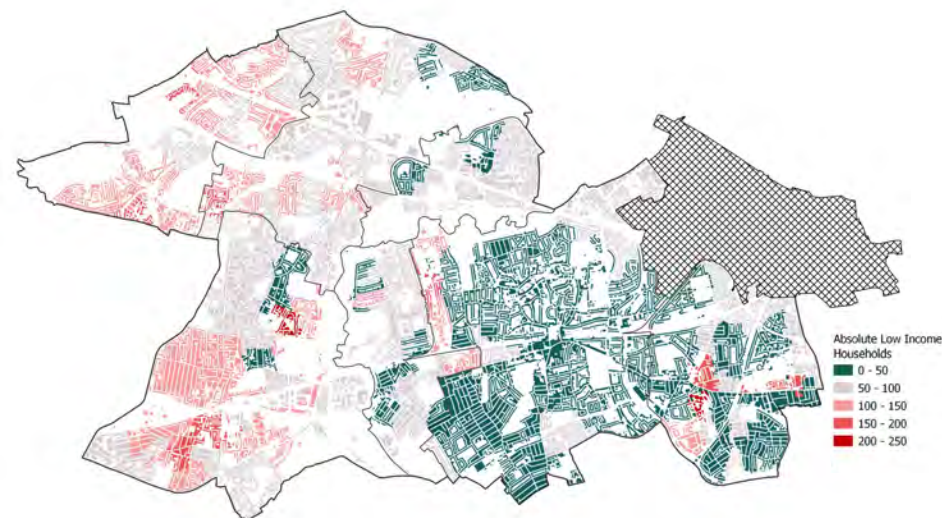
Low earnings, high housing costs, and poor quality work will all affect the economic resilience of households in the short-term as the cost of living crisis continues to bite.

## WHAT THE COUNCIL IS ALREADY DOING…

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

- **Local Welfare Assistance scheme**: Local welfare assistance is a discretionary support scheme. The fund is there to help people to try to maintain an independent life or for those facing an immediate financial crisis. Ealing residents could be eligible for extra financial support over winter through this scheme. Residents who have unsuccessfully applied before may be able to receive help under the new rules.

- **Council tax support scheme**: Our council tax support scheme provides up to 100% discount on bills to the most vulnerable. Around 16,500 working age Ealing residents, and 7,400 pensioners, currently receive help paying their council tax through this scheme. That's around one out of every six households.

- **Free school meals:** Families will children who receive certain benefits, or who have no recourse to public funds, are strongly encouraged to apply for free school meals.

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

Absolute Low Income Households
- 0 - 50
- 50 - 100
- 100 - 150
- 150 - 200
- 200 - 250

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

12,591

13,848

Source: DWP StatXplore
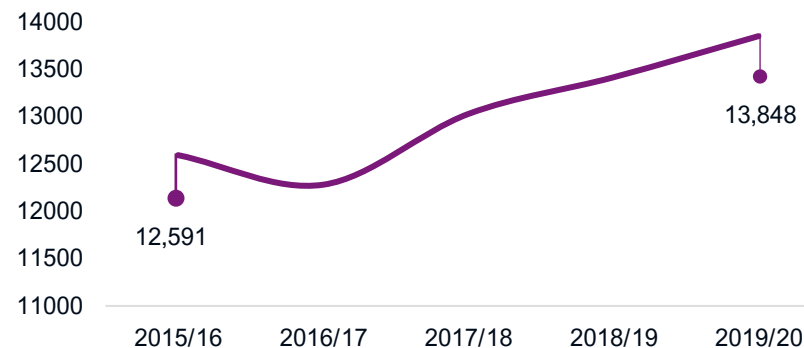
FACTORS SHAPING PROSPERITY: EALING'S GROWTH OPPORTUNITY

WHAT THE DATA SHOWS…

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

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

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

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

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

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

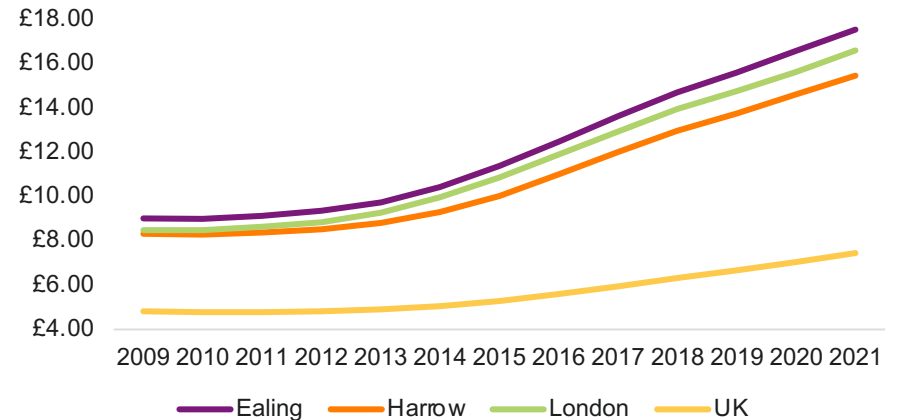## WHAT THE COUNCIL IS ALREADY DOING…

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

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

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

- Industrial intensification: understanding the potential to increase employment densities on industrial sites to create more jobs and make the best use of space.

- Co-location: where sensible and viable, exploring where residential and industrial uses can be located in close proximity to create thriving, mixed-use neighbourhoods.

- Growing and greening existing sectors: understanding how the green and low carbon economy can be supported to grow in industrial areas to accelerate the transition to net zero and create good new jobs.

Average industrial rents per sqft, 2009-2021

Employment change, 2016-2020

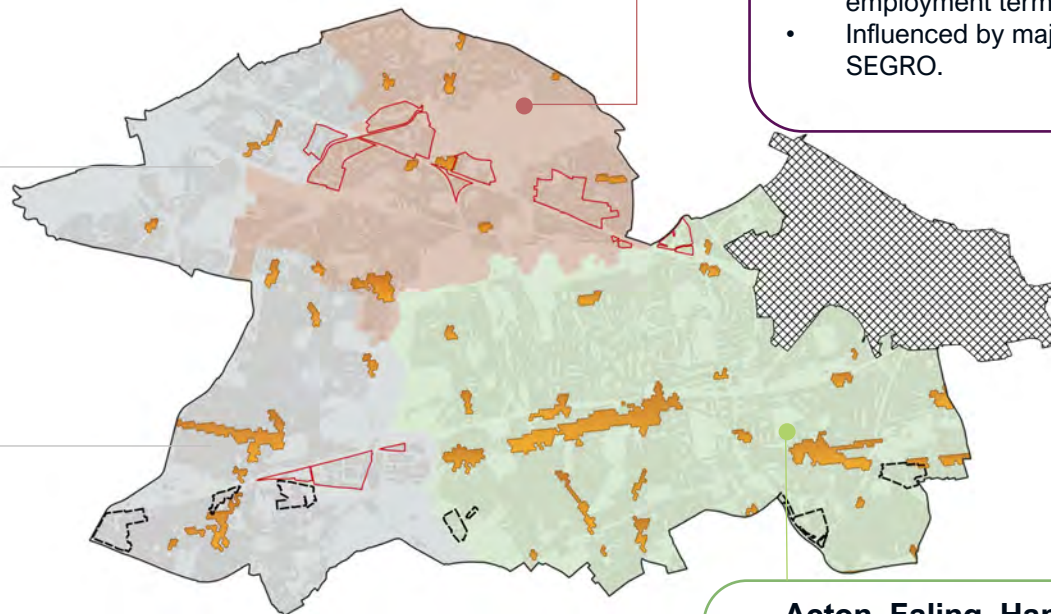Source: ONS BRES, Business Counts, CoStar – Iceni Employment Land Review
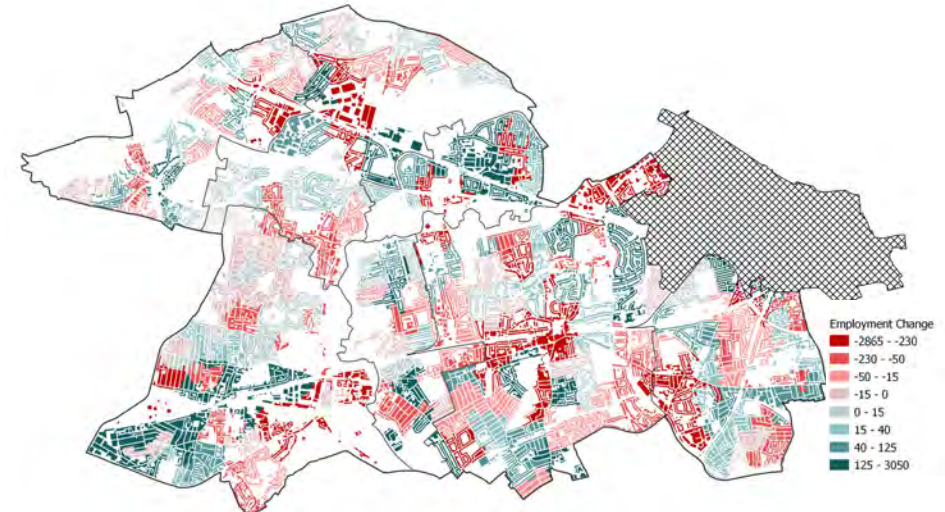
RESPONDING TO THE EVIDENCE: EALING'S THREE ECONOMIES

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

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 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.
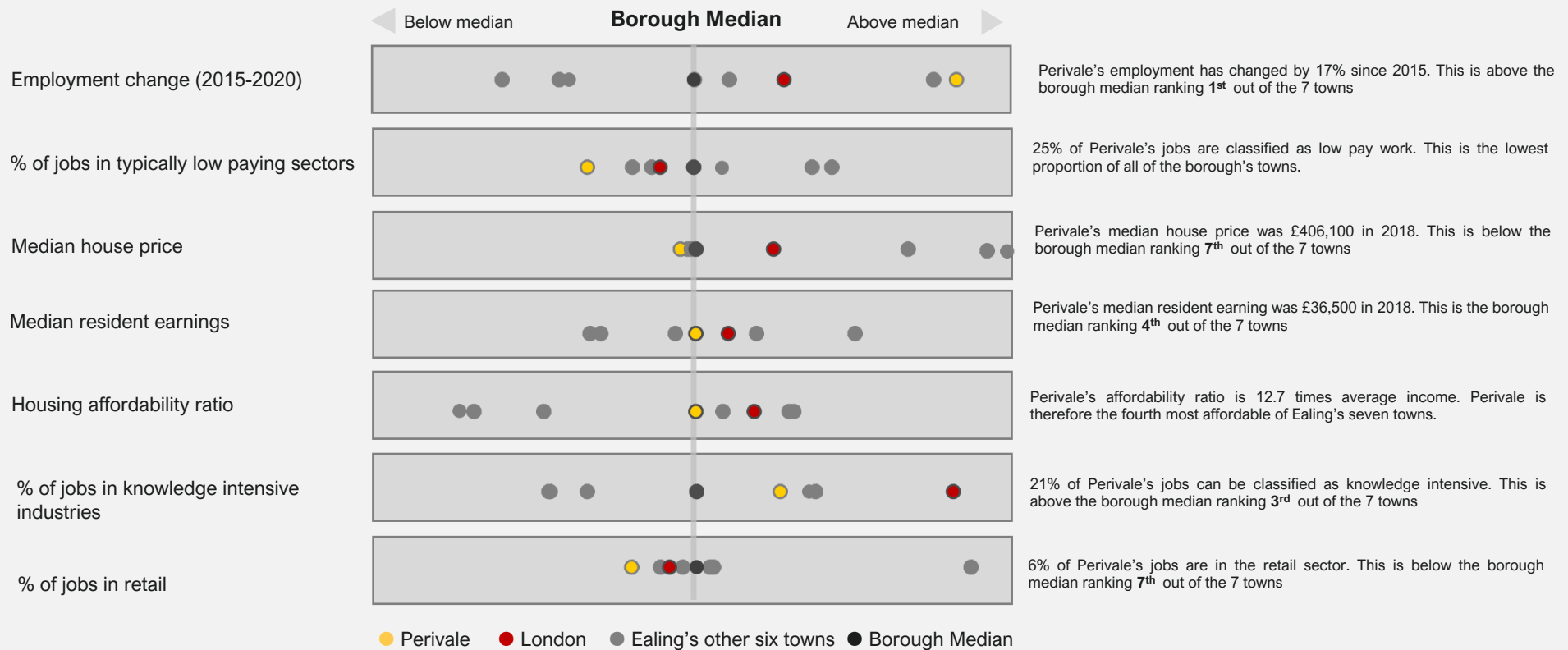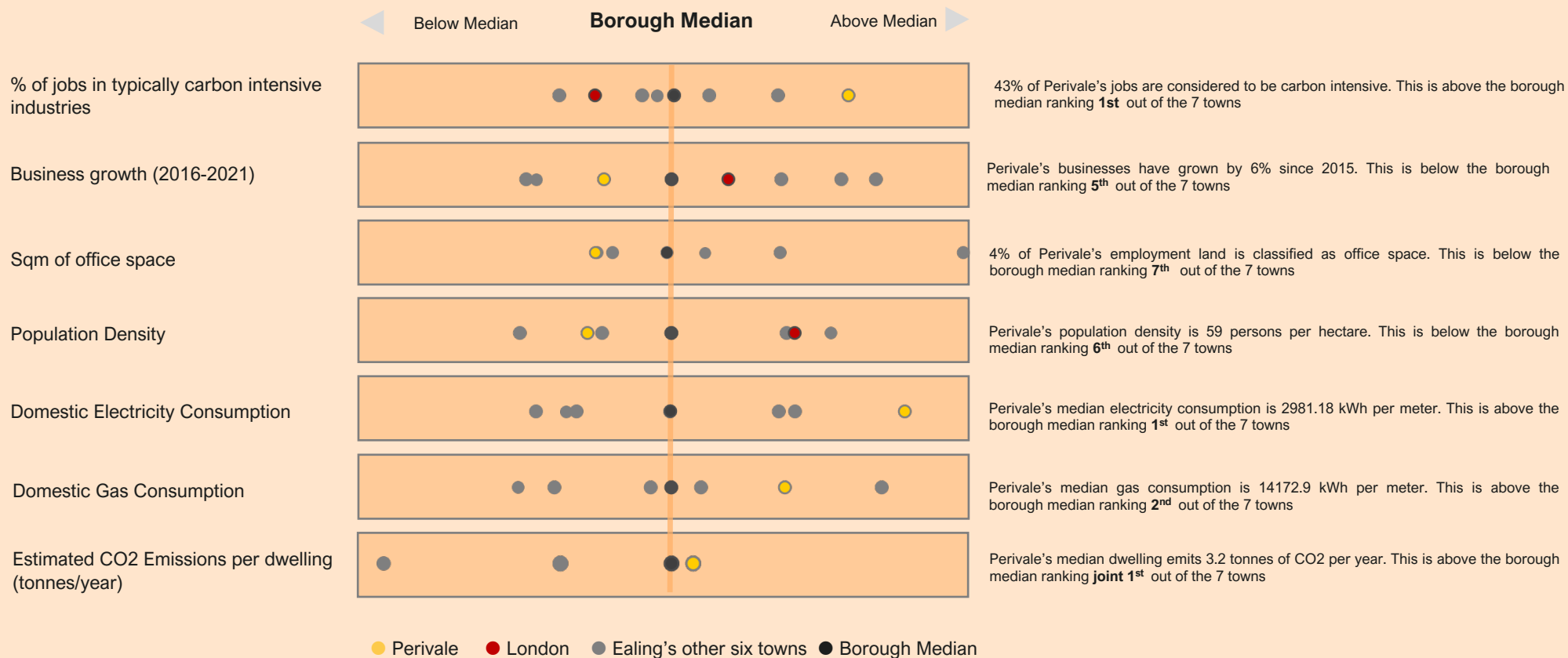
CHAPTER 2

PERIVALE'S HEADLINE ECONOMIC PERFORMANCE

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PERIVALE'S HEADLINE ECONOMIC PERFORMANCE: JOBS AND HOMES

Below median **Borough Median** Above median

Employment change (2015-2020)

Perivale's employment has changed by 17% since 2015. This is above the borough median ranking **1st** out of the 7 towns

% of jobs in typically low paying sectors

25% of Perivale's jobs are classified as low pay work. This is the lowest proportion of all of the borough's towns.

Median house price

Perivale's median house price was £406,100 in 2018. This is below the borough median ranking **7th** out of the 7 towns

Median resident earnings

Perivale's median resident earning was £36,500 in 2018. This is the borough median ranking **4th** out of the 7 towns

Housing affordability ratio

Perivale's affordability ratio is 12.7 times average income. Perivale is therefore the fourth most affordable of Ealing's seven towns.

% of jobs in knowledge intensive industries

21% of Perivale's jobs can be classified as knowledge intensive. This is above the borough median ranking **3rd** out of the 7 towns

% of jobs in retail

6% of Perivale's jobs are in the retail sector. This is below the borough median ranking **7th** out of the 7 towns

● Perivale ● London ● Ealing's other six towns ● Borough Median

Sources: BRES, Business Counts, ASHE

Ealing
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PERIVALE'S HEADLINE ECONOMIC PERFORMANCE: ENVIRONMENT AND ECONOMY

◄ Below Median   **Borough Median**   Above Median ►

% of jobs in typically carbon intensive industries

43% of Perivale's jobs are considered to be carbon intensive. This is above the borough median ranking **1st** out of the 7 towns

Business growth (2016-2021)

Perivale's businesses have grown by 6% since 2015. This is below the borough median ranking **5th** out of the 7 towns

Sqm of office space

4% of Perivale's employment land is classified as office space. This is below the borough median ranking **7th** out of the 7 towns

Population Density

Perivale's population density is 59 persons per hectare. This is below the borough median ranking **6th** out of the 7 towns

Domestic Electricity Consumption

Perivale's median electricity consumption is 2981.18 kWh per meter. This is above the borough median ranking **1st** out of the 7 towns

Domestic Gas Consumption

Perivale's median gas consumption is 14172.9 kWh per meter. This is above the borough median ranking **2nd** out of the 7 towns

Estimated CO2 Emissions per dwelling (tonnes/year)

Perivale's median dwelling emits 3.2 tonnes of CO2 per year. This is above the borough median ranking **joint 1st** out of the 7 towns

● Perivale   ● London   ● Ealing's other six towns   ● Borough Median

PERIVALE'S HEADLINE ECONOMIC PERFORMANCE: EQUALITY AND PEOPLE

◄ Below Median   **Borough Median**   Above Median ►

% of LSOAs in top 20% most deprived nationally
None of Perivale's LSOAs are in the top 20% deprived nationally. This is below the borough median ranking **7th** out of the 7 towns

% of children living in absolute low income families
As of 2020/2021 there were 371 relatively low income households. This is the borough median ranking **4th** out of the 7 towns

Claimant as proportion economically active 16+ (Feb '22)
Perivale's proportion of 16+ receiving claimant benefits is 10.4. This is below the borough median ranking **6th** out of the 7 towns

Claimant count increase vs the start of the pandemic
Perivale's claimant count increase since the start of the pandemic is 99%. This is above the borough median ranking **joint 2nd** out of the 7 towns.

% in bad or very bad health
4.2% of Perivale's population are in bad or very bad health. This is below the borough median ranking **5th** out of the 7 towns

Median resident age
Perivale's median age is 38 . This is more than the borough median ranking **joint 2nd** out of the 7 towns

Life expectancy male
Perivale's male life expectancy is 80.9. This is equal to the borough median ranking **1st** out of the 7 towns

Life expectancy female
Perivale's female life expectancy is 85. This is below the borough median ranking **3rd** out of the 7 towns

● Perivale   ● London   ● Ealing's other six towns   ● Borough Median

Sources: ONS Claimant Counts, PHE, IMD

PERIVALE'S HEADLINE ECONOMIC PERFORMANCE

STRENGTHS

+ **Low Deprivation:** Perivale has no neighbourhoods that are in the 20% most deprived in the country.

+ **Good Quality Jobs:** Perivale has the lowest proportion of low-wage jobs in the borough. Similarly, despite Perivale's industrial character, over one in five jobs are considered to be 'knowledge intensive'. This suggests that there could be opportunities to diversify Perivale's economy and provide more good jobs for local people.

+ **Healthy resident population:** Resident life expectancy in Perivale is amongst the highest in the borough. Similarly, the proportion of residents living in bad or very bad health is below the borough median.

WEAKNESSES

- **Carbon Intensive and transition to net zero:** Perivale has the highest proportion of carbon-intensive industries in the borough. Households in the borough also consume the most electricity and gas as well as having the highest per dwelling emissions. This means that Perivale could be more exposed than other parts of the borough to the cost of living crisis in the short-term but also the net zero transition in the longer term.

- **Claimant Count Increase:** Whilst Perivale has the second lowest proportion of claimants of working age, the town's claimant count increased significantly at the start of the pandemic and is still significantly above pre-pandemic levels.

CHAPTER 3

PERIVALE'S ASSETS

Ealing
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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 over 10,000 responses. The proportion of responses varies by area, and while responses from Ealing (41% of total as compared to 25% of the borough's population resident in Ealing) and Hanwell (10% vs 8% population) towns are disproportionately larger, responses from all other town are smaller as compared to their populations. Responses from Southall are noticeably lower (10% as compared to 21% population). On the whole, Perivale respondents were more negative about their area than the borough average. However, the key things which Perivale residents were most positive about are presented below:
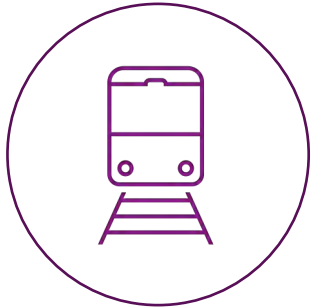
There was **33%** net agreement that Perivale has good public transport.

There was **26%** net agreement that people in Perivale feel welcome in the local area.

There was **42%** net agreement that people from different backgrounds in Hanwell get on well together.

There was **17%** net agreement that people in Perivale felt a sense of belonging.

PERIVALE'S POPULATION

Perivale is home to **15,700** people according to the ONS Mid Year Population Estimates.

75% of Perivale's population are educated to degree-level (NVQ 4+) compared to **66%** in Ealing and **60%** in London.

The average age of a Perivale resident is **38**. This is higher than the median age of Ealing and London residents. Despite this, **21%** of Perivale's residents are under the age of 15, compared **22%** in the borough as a whole.

17% of Perivale's population have no qualifications compared to **7%** in Ealing, **6%** in London.

Perivale is one of the most diverse places in the borough. In 2011, **55%** of Perivale's population was non-white. **33%** are Asian/Asian British and there is evidence to suggest the population is becoming increasingly diverse.

7.1% of Perivale's economically active population are claiming benefits. This is slightly lower than the Ealing average which stands at **6.8%.**

PERIVALE'S MAJOR EMPLOYERS (1)

Deluxe

Offers a range of services related to television and motion picture activities. Supporting content creators, broadcasters, streaming platforms and distributors.

B N S Colorama

Operates in the healthcare sector. Business activities include the supply, distribution and wholesale of pharmaceuticals.

Medicareplus International

Manufacturing of medical equipment; research, manufacture and distribution of protective and regenerative healthcare products.

Oliver Connell & Son Ltd
Deluxe
Microminder
Medicareplus International
B & S Colorama

PERIVALE'S MAJOR EMPLOYERS (2)

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

Microminder

Offers IT support for dentists and practices such as consultancy, hardware supply, communication services, backup and recovery.

Connell Oliver & Son Ltd

RC Frame and Groundworks subcontractors; Construction of civil engineering projects such as specialist rail, civil and aviation division.

Oliver Connell & Son Ltd
Deluxe
Microminder
B & S Colorama
Medicareplus International
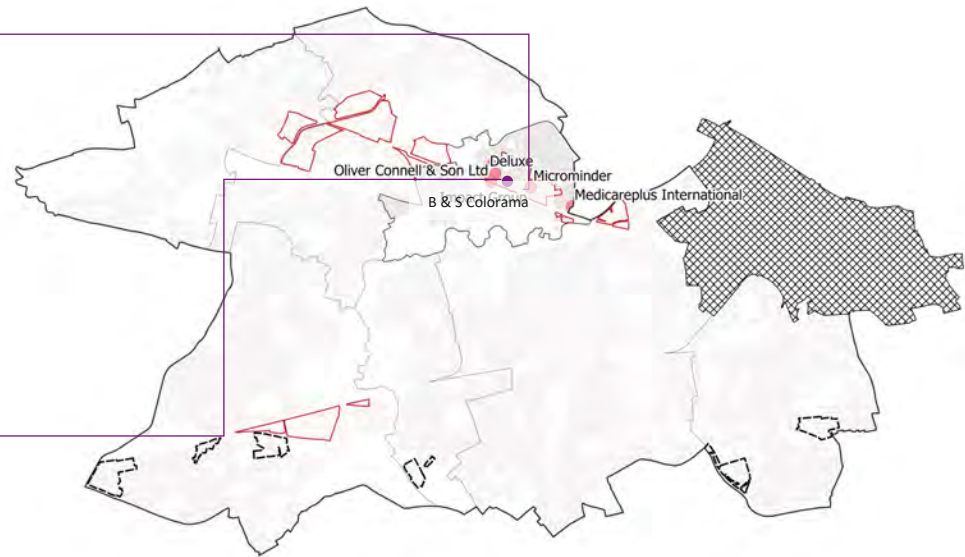
PERIVALE'S KEY PUBLIC SECTOR ASSETS

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

Ealing Central Sports Ground: A large park that is used as sports pitches for football & cricket. he park also has a library support office and the Perivale Residents Association.

Perivale Community Centre: has a Sports Hall, Social Hall and meeting rooms.

Public Assets
- Play Centre
- Community Centre
- Industrial
- Office
- Retail

PERIVALE'S CULTURAL INFRASTRUCTURE (1)

Perivale Library

A community-managed library that offers community activities and events to the general public.

Electro Props

Prop specialists in medical, scientific equipment and a range of electrical and electronic props.

Embroidery by Design Limited

Large scale, bespoke embroidery of badges, banners and flags for fashion, film and TV.

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

PERIVALE'S CULTURAL INFRASTRUCTURE (2)

Impact Studio Theatre

Hosts a range of activities such as dance rehearsal, film/video shoot, music rehearsal, performance spaces, theatre rehearsal and workshops/classes.

Stewkley House

Provides creative art workspaces with a range of art studios, office spaces and warehouse spaces.

Music Studios

Perivale has 2 music recording studios. These are: Tiger Books Ltd, Sigmum Records.

Cultural Infrastructure

- Arts centres
- Cinemas
- Museums and public galleries
- Theatres
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- Music rehearsal studios

PERIVALE'S MAJOR DEVELOPMENTS

40 residential units
Proposals include residential units and a community/caretaker facility.

Western Avenue
100% affordable housing development. 57 new homes, with 29 of these earmarked as London Affordable Rent and the remaining for 28 shared ownership.

Bilton Rd
105 apartments for affordable rent and private sale. The development includes landscaping, amenity, and parking spaces.

The Wiltern
Art deco build-to-rent scheme. This will deliver 278 homes of which 35% will be affordable, providing new rental housing for Ealing, over a range of market rents.

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 over 10,000 responses. The proportion of responses varies by area, and while responses from Ealing (41% of total as compared to 25% of the borough's population resident in Ealing) and Hanwell (10% vs 8% population) towns are disproportionately larger, responses from all other town are smaller as compared to their populations. Responses from Southall are noticeably lower (10% as compared to 21% population). The key things which Perivale residents believed to be bad about their local area are presented below:

There was **41%** net disagreement that Perivale has a good range of affordable homes.

There was **19%** net disagreement that Perivale has clean air.

There was **53%** net disagreement people were happy with the way Perivale is changing. This was a significantly higher net dissatisfaction than the borough average.

There was **29%** net disagreement that Perivale has good employment opportunities.

KEY CHALLENGE 1: TOWN CENTRE ENVIRONMENT

WHAT THE EVIDENCE SHOWS…

Perivale is the smallest town centre in the borough. The functional area is comprised of a single shopping parade along the northern side of Bilton Road. Whilst town centre vacancy is low, retail parades could do more to encourage people to visit and stay for longer.

- Perivale has the lowest proportion of opportunities to eat on-site compared with other town centres. Although 17% of the town centre uses provide a food and beverage offering, the offering is not conducive to a successful night-time economy, nor does it encourage time to be spent within the town centre given the quantity of takeaways.

- The Arup Town Centre Heath Check also noted that the environment is not particularly appealing; shops and buildings are run down and there is limited planting and greenery. It suggested that street space provision is poor, with limited places to sit, enjoy the space, or rest.

- Evidence shows that this is being borne out through Perivale's footfall figures. The chart (top right) is taken from the GLA's High Street Data Service which Ealing Council subscribes to. This allows for ongoing, real-time monitoring of high street footfall and spend to understand town centre vitality. The evidence shows that whilst daytime footfall is relatively consistent throughout the week, it falls off significantly after 4PM.

Source: GLA High Street Data Service

Perivale March 2022 visitor pattern

	h0	h6	h7	h8	h9	h10	h11	h12	h13	h14	h15	h16	h17	h18	h19	h20	h21	h22	h23
Mo	328	319	450	548	688	823	902	915	955	918	793	748	700	621	521	471	424	370	275
Tu	362	403	468	608	791	930	1052	1075	1039	905	835	769	714	608	579	518	467	398	332
We	363	363	494	623	803	872	887	930	937	928	870	796	733	699	632	531	492	419	335
Th	357	352	502	596	735	846	946	974	937*	1011	903	807	750	680	598	593	559	461	351
Fr	380	384	497	575	698	828	861	909	935	883	818	806	776	729	672	606	581	511	483
Sa	439	365	421	526	650	783	880	974	1019	987	992	987	884	842	788	742	702	636	512
Su	518	359	375	421	494	631	773	897	953	970	1005	930	793	704	660	608	469	375	304

Note: Numbers above refer to average numbers of visitors throughout the week.

ARUP town centre health check for Perivale
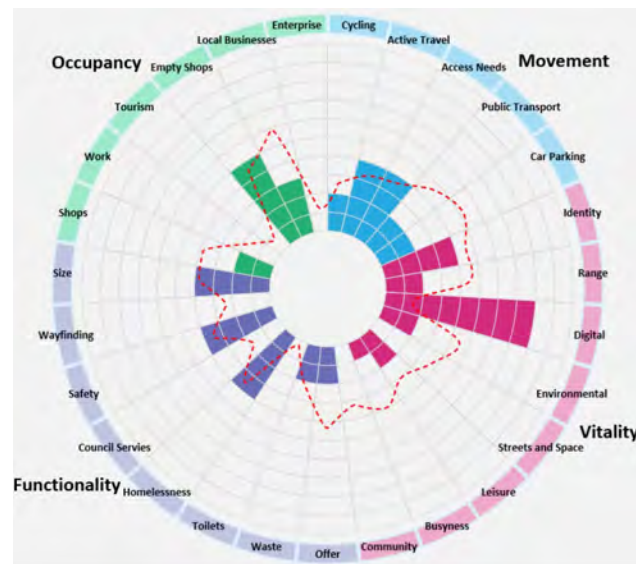
KEY CHALLENGE 2: KEY EMPLOYMENT SECTORS AT RISK OF DISPLACEMENT

WHAT THE EVIDENCE SHOWS…

Perivale hosts significant traditional manufacturing specialisms which provides good quality local jobs. Trends in demand for the borough's industrial land means that these uses are at risk.

- Designated industrial areas are integral to Ealing's economic prosperity.

- The majority of industrial land within Perivale is designated as London's Strategic Industrial Land (SIL). SIL is London's main reservoirs of industrial and related capacity, and are protected in the London Plan to reflect their importance to London's economy.

- Perivale's industrial land contains a range of important manufacturing and urban services uses (such as Motor Trades) which together provide over 700 jobs in the town. However, evidence from Industrious Ealing suggests that these sectors are most at risk of being pushed out of the borough due to rising rents and increased demand from other sectors.

- This is reflected through recent industrial employment change. Whilst warehousing and logistics employment has grown over the last five years, manufacturing employment in Perivale has shrunk by 120 jobs over the last five years.

Source: ONS BRES, Iceni analysis of CoStar for the Ealing Employment Land Review Update

Perivale economic profile, 2021

Industry	Businesses	% of businesses	LQ	Jobs	% of jobs	LQ
Construction	200	29%	**2.58**	615	10%	**2.87**
ICT, Media and Creative Services	85	12%	0.48	805	13%	1.17
Manufacturing	85	12%	0.48	520	8%	**3.71**
Hospitality, Leisure and Recreation	85	12%	0.48	455	7%	0.70
Financial and Professional Services	85	12%	0.48	400	6%	0.29
Public Admin, Education, Health	60	9%	**6.49**	745	12%	0.49
Retail	60	9%	1.03	445	7%	0.83
Motor Trades	60	9%	**6.49**	195	3%	**4.75**
Other Services	60	9%	**6.49**	140	2%	**1.68**
Business Support Services	55	8%	0.89	185	3%	0.31
Transport	35	5%	**2.38**	910	14%	**3.63**
Warehousing and Logistics	15	2%	**1.67**	165	3%	**2.41**
Utilities and waste	15	2%	0.40	10	0%	0.25
Wholesale	5	1%	0.26	800	13%	**3.93**

Average industrial rents per sqft, 2009-2021
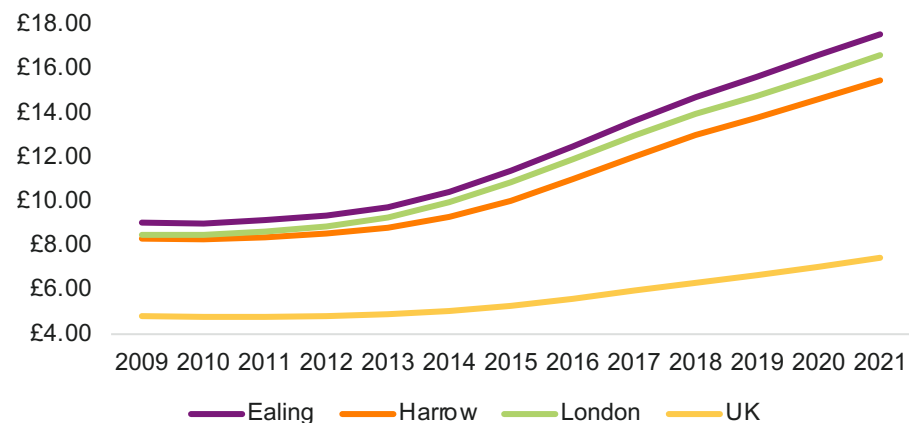
CHAPTER 5

PERIVALE'S OPPORTUNITIES

Ealing
www.ealing.gov.uk

# OPPORTUNITY 1: IMPROVING EXPERIENCE ALONG KEY RETAIL PARADES

A POTENTIAL PRIORITY COULD BE…

To secure funding to improve Perivale's retail parades to increase footfall, dwell time, and spend.

- New residential development around Bilton Road (see Page 28) can help to increase the vitality of Perivale's retail parades. However, these need to be enhanced to improve user experience.
- Ealing Council is currently commissioning a 20-minute neighbourhood study for Greenford and Perivale which is due to complete in Summer 2022. This will advise on the types of interventions which could support the vitality of Perivale's retail parades. Recommendations are will include:
    - Densifying and enhancing the offer of local parades including Oldfields Circus Greenford Station, Greenford Road, and Bilton Road.
    - Improving the landscape at these smaller centres celebrating what's currently there and creating a more attractive environment for local people who access it.
    - Better integration of incidental greenery into the streetscape and better provision of spaces to sit and relax in the town centre given the generous width of the public footway.
    - Uplift to unit frontages along the shopping parade.
- There are a range of smaller scale, inexpensive interventions that could be considered to support this to encourage more people to visit Perivale post-COVID.

Case study 1: Enfield Fountain Island

- Al fresco dining was launched in Enfield during the summer of 2021 to help support local businesses to welcome customers in a fun and safe outdoor environment.
- Enfield Council has helped three businesses to expand onto the area known as Fountain Island. This in turn will help increase footfall to the town centre and support the wider local economy in its recovery and renewal.
- Gooey Waffle, Bonito Café and The Art Town all feature on this exciting new mini-plaza. The scheme includes the loan of furniture and equipment to the businesses and the assembly of safety features and attractive planting.
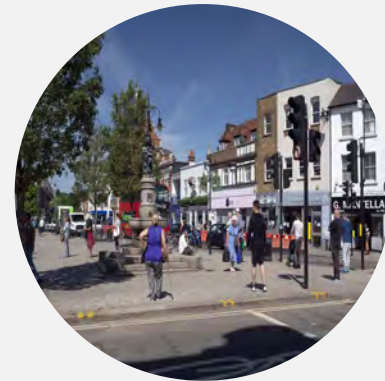
OPPORTUNITY 2: HARNESSING THE POTENTIAL OF CONSOLIDATED INDUSTRIAL LAND OWNERSHIP

A POTENTIAL PRIORITY COULD BE…

Engaging key decision makers to deliver shared priorities. Industrial areas are key to Perivale's economy and host the borough's largest employers. Working with major landowners on shared priorities can help to deliver more for Perivale's residents.

- Perivale contains a significant proportion of Ealing's protected industrial land and this is where the majority of the town's economic activity is concentrated.

- There is a wider opportunity to create better strategic links with major businesses and landowners to develop shared priorities.

- SEGRO recently purchased Perivale Park and engagement undertaken with them as part of Industrious Ealing suggested that they intend to invest significantly in improving the estate in the next few years.

- SEGRO are now major landowners in Greenford and Perivale and coordinated ownership presents good opportunity to explore synergies and how working with the council can help to scale/compliment Segro's existing skills and environmental programmes within the borough.

- As a result, this could be considered as a shared priority with the Greenford Town Forum to maximise its scale and reach.

Case Study 2: Havering Works Job Brokerage

- SEGRO has recently invested heavily in Ealing and has plans to improve its stock across the borough. It has experience of partnering with local authorities to advance shared objectives.

- SEGRO is working with Havering Council, Havering College and Havering Job Centre Plus to deliver the Havering Works Job Brokerage Service which is a dedicated skills, training and employment service for local people to support both construction and occupation of the SEGRO Park Rainham development.

- The service seeks to offer support for vulnerable groups in the borough and residents who are under-employed or looking for in-work progression.

- The Havering Works Job Brokerage Service is available to all industrial occupiers in the surrounding area to help people in the local community access a wider range of job opportunities.
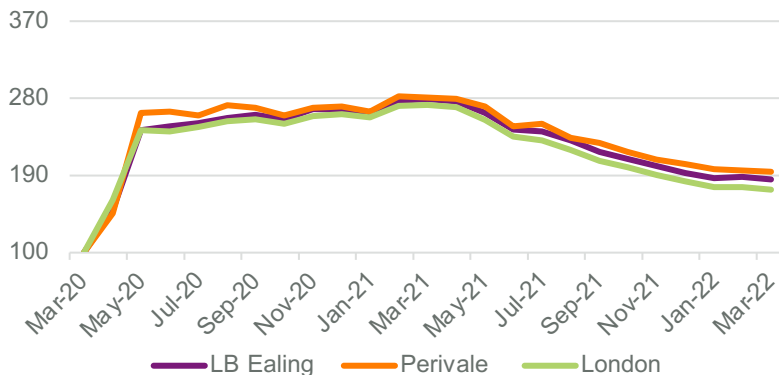
KEY CHALLENGE 3: SIGNIFICANT CLAIMANT COUNT INCREASE
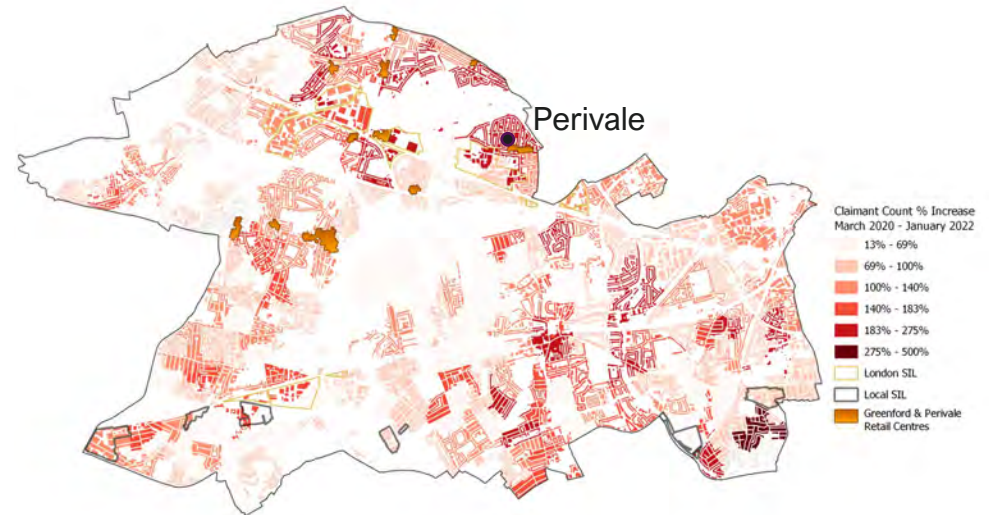
WHAT THE EVIDENCE SHOWS…

The impact of the pandemic has had a disproportionately large impact on Perivale.

- In February 2021, Perivale claimant count peaked to just under 3 times pre-pandemic levels.

- As of March 2022, the claimant count was still around double pre-pandemic levels. Since the start of the pandemic, the claimant count has remained above the borough and London averages.

- Claimant count increase has been most acute to the North of the A40. There is therefore potential to increase awareness/broker local skills and employment opportunities in businesses that are struggling to recruit locally (e.g. Brompton Bikes in Greenford). Also ensure that local people have access to skills and training to take advantage of local opportunities and identify gaps in provision.

Claimant count increase, pre-COVID-19 to January 2022

Indexed claimant count, March 2020-March 2022, March 2020=100

Source: ONS Claimant Count