TOWN BRIEFING: SOUTHALL

JUNE 2022

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EALING'S SEVEN TOWNS

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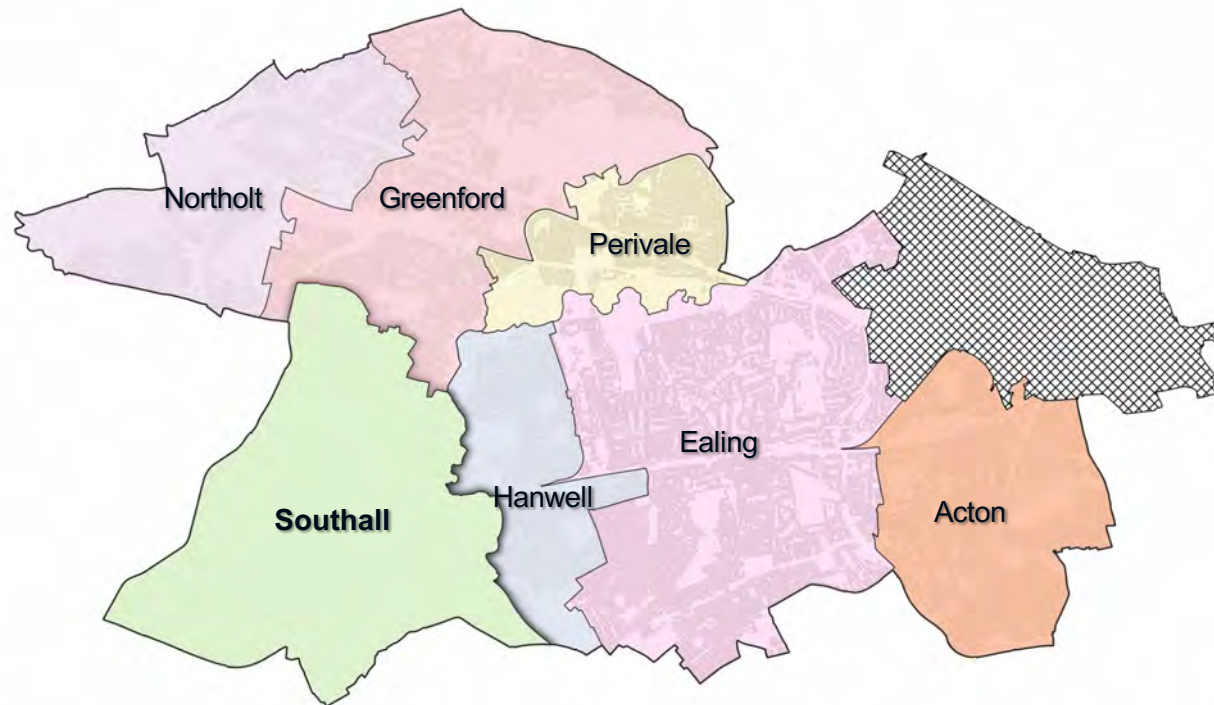
SOUTHALL TOWN BRIEFING

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

Ealing's Economic Context

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

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

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

- **Jobs and Homes**

- **Environment and Economy**

- **Equality and People**

This chapter contains several key factors that will define prosperity at a borough and local level. This includes a summary of the action the council is already taking, and information about relevant economic strategies, projects, and plans. Population data will be updated in Autumn 2022 following the publication of 2021 Census data at a town-level.

Southall's Economic Profile

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

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

Southall's Assets

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

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

Southall's challenges

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

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

Southall's opportunities

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

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

About this briefing:

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

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

CHAPTER 1

EALING'S ECONOMIC CONTEXT

LONDON'S ECONOMIC EVOLUTION…

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

A DECADE OF GROWTH…

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

London's population 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.

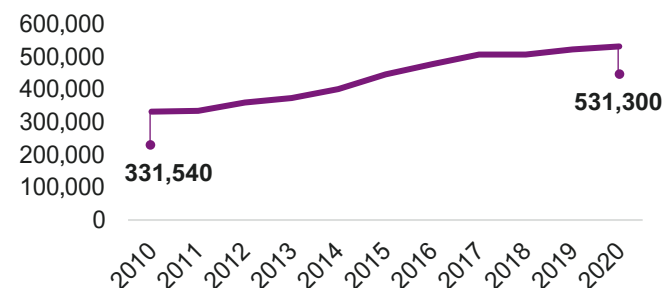## THESE FRAGILITIES HAVE BEEN EXPOSED BY THE PANDEMIC…

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

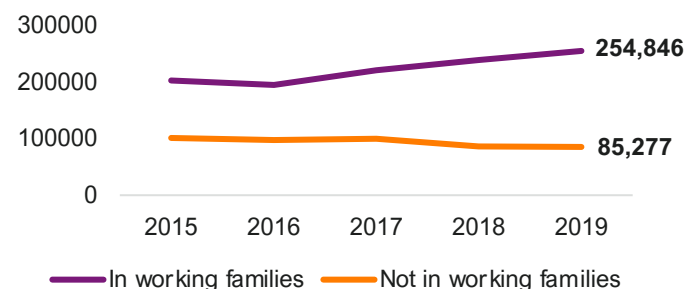This is reinforced by the following indicators:

- **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

600,000
500,000
400,000
300,000
200,000
100,000
0

2010 2011 2012 2013 2014 2015 2016 2017 2018 2019 2020

331,540
531,300

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

300000
200000
100000
0

2015 2016 2017 2018 2019

254,846
85,277

— In working families — Not in working families

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%

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%	Westminster 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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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%				

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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
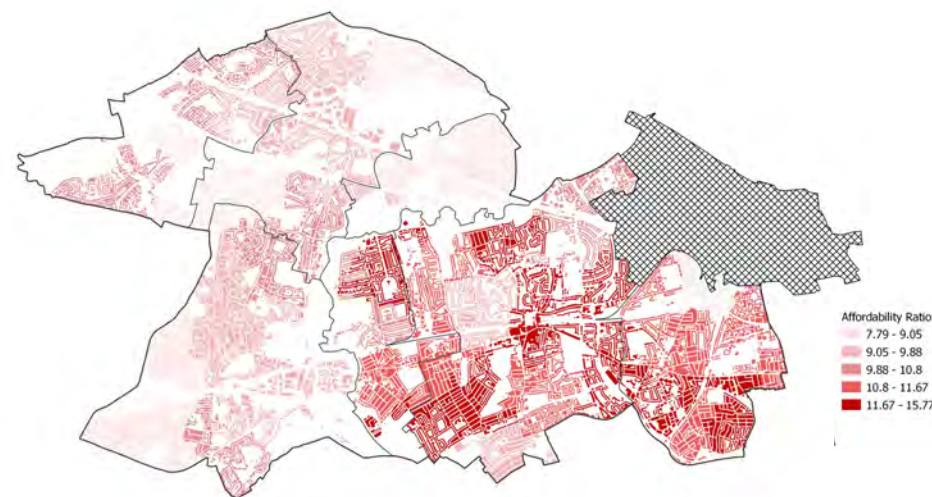
Housing affordability Ratio, 2002-2021

Ealing 15.79 — London 13.65

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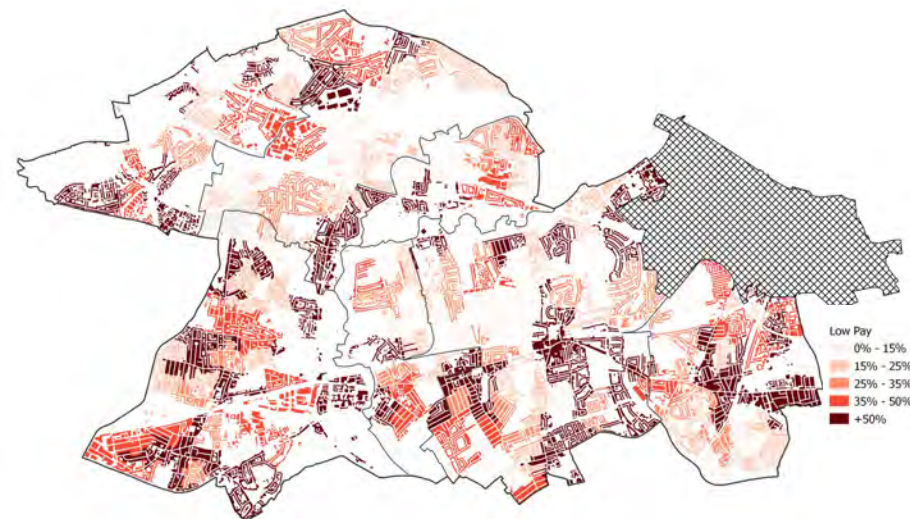
Number of jobs in Ealing paying less than the London Living Wage, 2006-2018

Source: DWP StatXplore
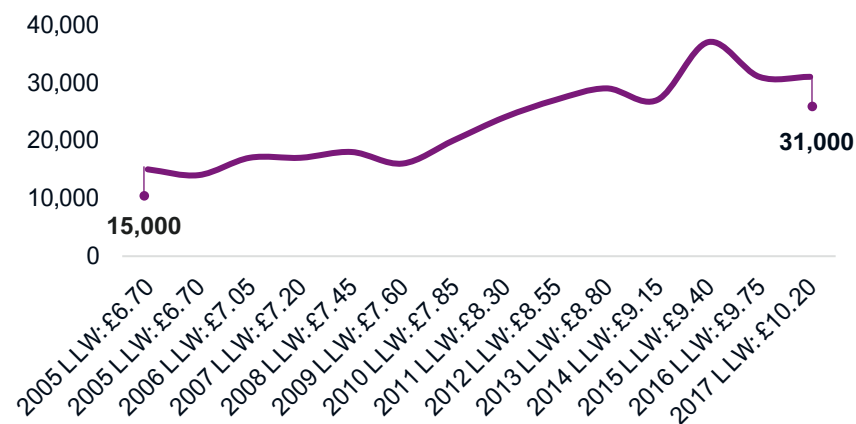
FACTORS SHAPING PROSPERITY: POVERTY

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.

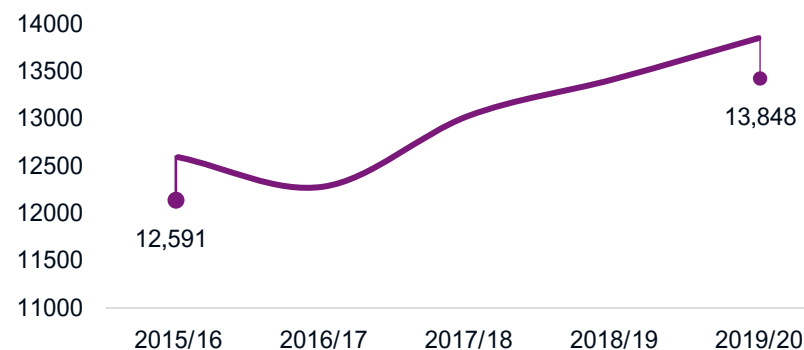## WHAT THE COUNCIL IS ALREADY DOING…

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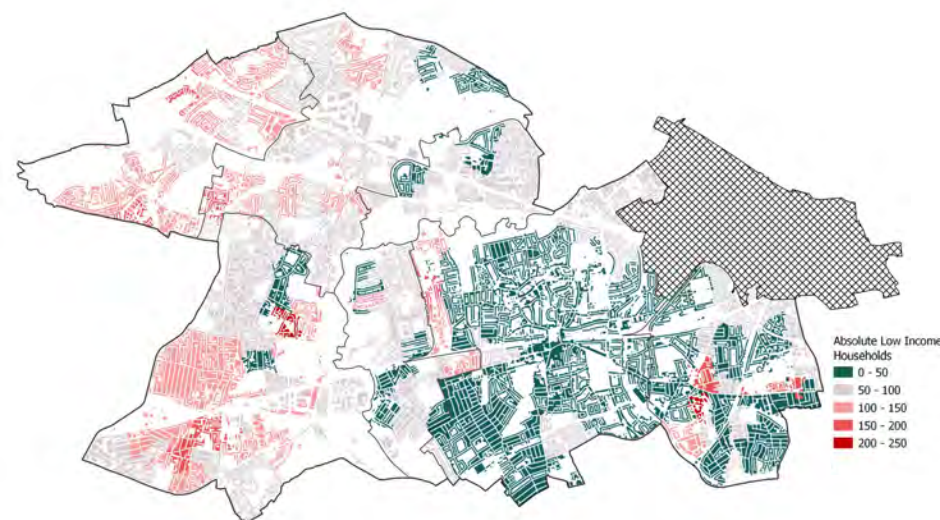
Absolute Low Income Households
- 0 - 50
- 50 - 100
- 100 - 150
- 150 - 200
- 200 - 250

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

12,591

13,848

| | 2015/16 | 2016/17 | 2017/18 | 2018/19 | 2019/20 |

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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.

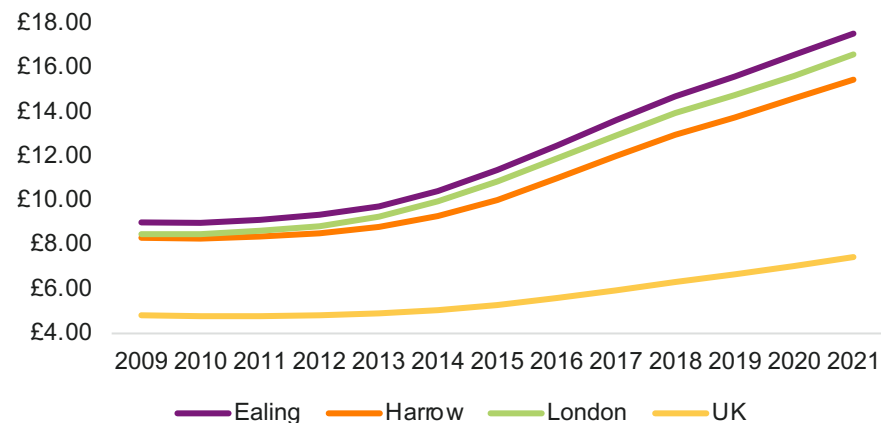## WHAT THE COUNCIL IS ALREADY DOING…

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
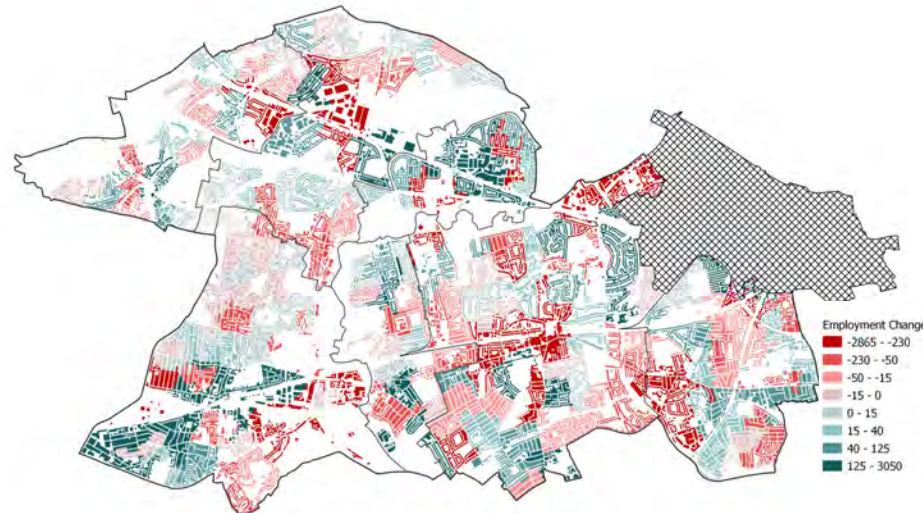
RESPONDING TO THE EVIDENCE: EALING'S THREE ECONOMIES

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.

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13.

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

SOUTHALL'S HEADLINE ECONOMIC PERFORMANCE

Ealing

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SOUTHALL'S HEADLINE ECONOMIC PERFORMANCE: JOBS AND HOMES

◁ Below median   **Borough Median**   Above median ▷

Employment change (2015-2020)
Southall's employment has changed by 15% since 2015. This is above the borough median ranking **2nd** out of the 7 towns

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

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

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

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

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

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

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

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SOUTHALL'S HEADLINE ECONOMIC PERFORMANCE: ENVIRONMENT AND ECONOMY

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

% of jobs in typically carbon intensive industries

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

Business growth (2016-2021)

Southall's businesses have grown by 20% since 2015. This is above the borough median ranking **1st** out of the 7 towns

Sqm of office space

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

Population Density

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

Domestic Electricity Consumption

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

Domestic Gas Consumption

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

Estimated CO2 Emissions per dwelling (tonnes/year)

Southall's median dwelling emits 3.2 tonnes of CO_2 per year. This is below the borough median ranking **joint 1st** out of the 7 towns

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

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

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SOUTHALL'S HEADLINE ECONOMIC PERFORMANCE: EQUALITY AND PEOPLE

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

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

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

Claimant as proportion economically active 16+ (Feb '22)
Southall's proportion of 16+ receiving claimant benefits is 14.1%. This is below the borough median ranking **7th** out of the 7 towns

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

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

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

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

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

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

Sources: ONS Claimant Counts, PHE, IMD

SOUTHALL'S HEADLINE ECONOMIC PERFORMANCE

STRENGTHS

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

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

WEAKNESSES

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

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

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

- **Emissions and energy consumption:** Domestic energy consumption and CO_2 emissions are amongst the highest in the borough. A focus on green jobs and upskilling local people in retrofitting can help to address this (see page 36).

CHAPTER 3

SOUTHALL'S ASSETS, STRENGTHS AND USPs

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WHAT WE'VE HEARD

Initial engagement to inform the new Local Plan for Ealing was launched on 10 November 2021. It consisted of an online survey on the GiveMyView digital platform and a series of community engagement events held in various parts of the borough. The online survey has received over 10,000 responses. The proportion of responses varies by area, and while responses from Ealing (41% of total as compared to 25% of the borough's population resident in Ealing) and Hanwell (10% vs 8% population) towns are disproportionately larger, responses from all other town are smaller as compared to their populations. Responses from Southall are noticeably lower (10% as compared to 21% population). It is worth noting that respondents from Southall were significantly more negative than the borough average. However, the key things which Southall residents were most positive about are presented below:
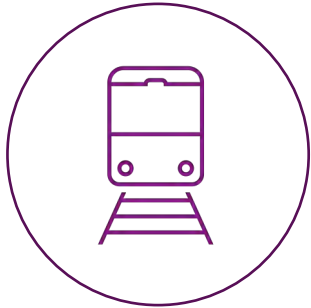
There was **26%** net agreement that Southall has good public transport. This is likely to improve with the arrival of Crossrail.

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

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

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

SOUTHALL'S POPULATION

Southall is home to **70,600** people according to the ONS Mid Year Population Estimates.

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

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

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

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

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

SOUTHALL'S MAJOR EMPLOYERS (1)

Ealing Hospital NHS Trust

General hospital providing a range of clinical services.

St Bernard's Hospital

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

Noon Products

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

Noon Product Delifrance Ealing Hospital Nhs Trust
London Workwear Rental
St Bernards Hospital

SOUTHALL'S MAJOR EMPLOYERS (2)

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

Delifrance

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

London Workwear Rental

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

Noon Product
London Workwear Rental
Delifrance Ealing Hospital Nhs Trust
St Bernards Hospital

SOUTHALL'S KEY PUBLIC SECTOR ASSETS

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

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

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

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

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

25.
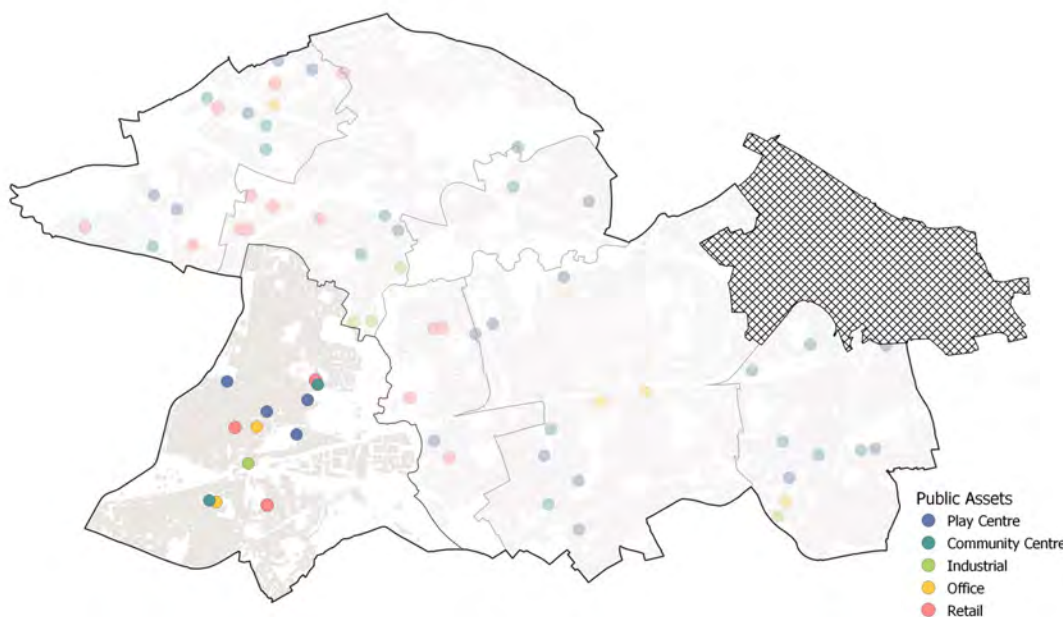
SOUTHALL'S CULTURAL INFRASTRUCTURE

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

Jewellery

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

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

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

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

26.

SOUTHALL'S MAJOR DEVELOPMENTS

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

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

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

The Arches (Merrick Place)
4 towers ranging from 15 to 23 storeys. Delivering 575 new homes and 2,549 sqm of flexible commercial space. Construction is yet to commence.
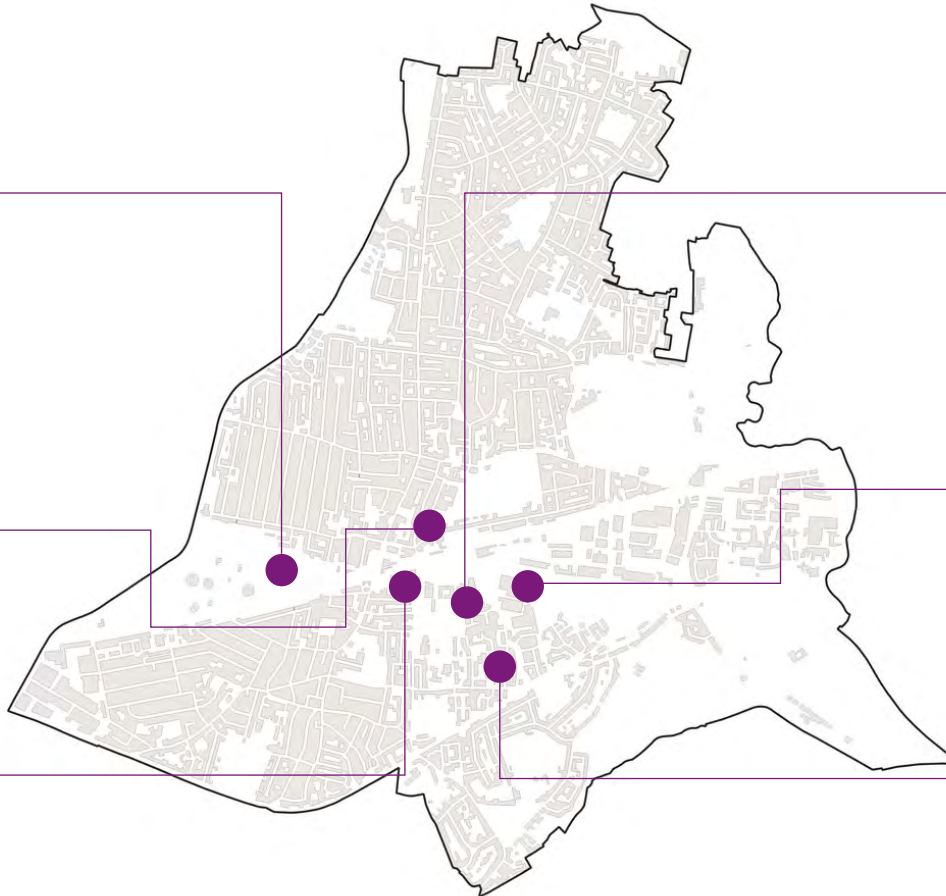
Margarine Works
This project will deliver 2,083 new homes, 10,076 sqm of flexible commercial space, 2,688sqm retail space, and 7,199sqm for a hotel. Construction is yet to commence.

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

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

CHAPTER 4

TOWN CHALLENGES

WHAT WE'VE HEARD

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

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

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

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

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

KEY CHALLENGE 1: LOW PAY, POVERTY AND DEPRIVATION

WHAT THE EVIDENCE SHOWS…

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

- The financial resilience of Southall's residents is likely to be severely tested by the cost of living crisis. High levels of domestic gas and energy consumption (see Page 17) is also likely to mean residents will be hit hardest by rising wholesale energy prices, which are due to increase again in October 2022.

- Earnings in Southall are the second lowest in the borough and significantly below the London average. Once housing costs are considered, net annual income is 18% less than the London average.

- This is exacerbated by high proportions of local employment in typically low paying sectors. The 2021 Low Pay Commission Report defines low paying sectors as: "industries which contain a high number or large proportion of low-paid workers based on the Standard Occupation Classification (SOC) and Standard Industrial Classification (SIC) codes published by ONS." Lowest paying industries in London includes Accommodation and Food (£16,303) and Wholesale and Retail (£22,974). By this definition, over half (52%) of Southall's jobs are in low paying sectors.

- These factors are compounded by high levels of deprivation, and has the second highest rates of extreme deprivation in the borough. 24% of Southall's neighbourhoods are within the top 20% most deprived nationally.

- This is contributing towards poor health and wellbeing outcomes in Southall – which are amongst the worst in Ealing. It has the lowest life expectancy in the borough as well as the highest proportion of people in bad or very bad health.

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

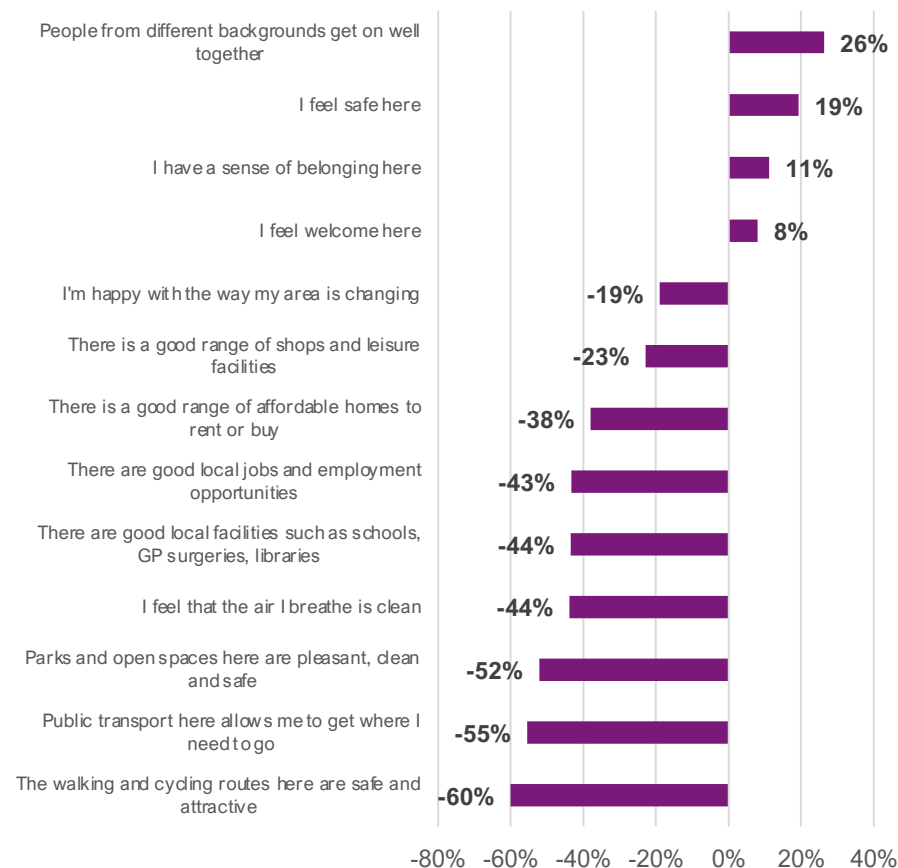|	Net annual income (2018)	Net annual income after housing costs (2018)	% of jobs in low paying industries	% of LSOAs in the top 20% most deprived nationally
1.	Ealing (£52,200)	Ealing (£37,578)	**Southall (52%)**	Northolt (40%)
2.	Acton (£47,843)	Acton (£33,143)	Northolt (47%)	**Southall (24%)**
3.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

Sources: ONS, BRES, IMD

Ealing

KEY CHALLENGE 2: PLACE PERCEPTION

WHAT THE EVIDENCE SHOWS…

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

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

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

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

- Generally, these findings run contrary to the professional audit of the town. The Town Centre Health Check undertaken by Arup which suggested that Southall town centre performed relatively well compared to other centres in the borough.

- This suggests a significant disconnect between resident and visitor place perception which the Town Forum should seek to address.

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

	Net score
People from different backgrounds get on well together	26%
I feel safe here	19%
I have a sense of belonging here	11%
I feel welcome here	8%
I'm happy with the way my area is changing	-19%
There is a good range of shops and leisure facilities	-23%
There is a good range of affordable homes to rent or buy	-38%
There are good local jobs and employment opportunities	-43%
There are good local facilities such as schools, GP surgeries, libraries	-44%
I feel that the air I breathe is clean	-44%
Parks and open spaces here are pleasant, clean and safe	-52%
Public transport here allows me to get where I need to go	-55%
The walking and cycling routes here are safe and attractive	-60%

Source: Shaping Ealing Survey

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

WHAT THE EVIDENCE SHOWS…

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

- Southall is identified in the Mayor's London Plan as an Opportunity Area (OA) with potential for 9,000 new homes and 3,000 new jobs by 2041.

- However, Research undertaken as part of the Shaping Ealing consultation suggested that local people were concerned about the pace of change in Southall. There was 38% net disagreement that people from Southall were happy with how their area was changing, which was more unfavourable that the borough average.

- This was also reflected within Southall's business community, as reflected by on-the-ground research by the architecture and urbanism practice, We Made That. This revealed that many businesses expressed anxiety over the future of their premises and concerns that their businesses would not be viable should they be required to move outside the area.

- Particular concerns came from MOT and auto repair traders, who have recently seen other traders lose their premises to forthcoming development.

- The study suggested that businesses benefitted from strong formal and informal networks within Southall and recognised that the cost of higher quality premises would be prohibitive to their continued operation.

- Southall and its cluster of industrial estates continue to attract and retain a wide mix of industrial activities and employment opportunities and businesses operating across the sites were noted to see the area as a productive place to do business.

Proposed development in Southall

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

CHAPTER 5

SOUTHALL'S OPPORTUNITIES

OPPORTUNITY 1: IMPROVING TOWN CENTRE ENVIRONMENT AND SAFETY

A POTENTIAL PRIORITY COULD BE…

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

- There are a range of examples showing how business collaboration can help to address local challenges of crime and improving town centre experience. One route to achieving this could be a Business Improvement District for Southall town centre.

- Business Improvement Districts (BIDs) have been delivering a wide range of benefits across UK business communities since 2003. However, over the past 16 years has presented the BID industry with significant challenges to demonstrate their value in light of austerity and the wider challenges facing high streets.

- BID consultation feedback gathered from business communities across the capital has clearly demonstrated that 'safe and secure' issues consistently rate amongst the top concerns for levy payers. There are a wide range of examples for how BIDs have supported crime reduction and there is evidence of a more holistic approach to crime reduction which includes working with working with the Metropolitan Police (BID Safe and Secure Report).

- BIDs also play a key role in improving the town centre environment. For example, InStreatham BID and Brixton BID have funded deep street cleaning, jet washing and removing chewing gum throughout the BID area, and this is a service Brixton BID plans to repeat annually.

- In Streatham, Vauxhall One and Team London Bridge have introduced greenery using hanging boxes, planters, and green walls to enhance the streetscape.

Case Study 2: Hammersmith BID and Crime Reduction Partnership

- The Hammersmith ShopWatch Scheme is a component of the wider Hammersmith BID – Crime Reduction Partnership (BID-CRP).

- Working in partnership with the Metropolitan Police and local authority (LBHF), our objectives are to support the business community by reducing crime and anti-social behaviour, and to establish a safer environment in which to work, visit and invest in.

- Hammersmith BID are also committed to supporting the public realm and greening investment. We will consult with our stakeholders to create a strategy for a more resilient and attractive town centre. This will include provision of safe, outdoor spaces, green public art, enhanced lighting, and potential pedestrian zones.

OPPORTUNITY 2: HARNESSING INVESTMENT TO CREATE GREEN JOBS

A POTENTIAL PRIORITY COULD BE…

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

- Currently, just over one in five jobs (22%) in Southall are in carbon intensive industries. This means that these jobs are in sectors that typically produce more CO2 emissions such as Transport, Manufacturing, and Construction. These jobs will need to change significantly if the UK is to meet its net zero obligations.

- Whilst the transition to net zero represents a key local challenge, there is also significant opportunity for economic renewal for places such as Southall. As shown on Page 17, domestic properties in Southall perform poorly for emissions and energy consumption – meaning the town should be a key focus for interventions such as retrofitting and enhancing energy performance of domestic and commercial property.

- Local institutions are already leading the way in ensuring residents and businesses have the skills to adapt to this. For example, the West London Green Skills Hub (see case study right) will be locating key bits of teaching in Southall.

- Initially, this will include equipping pupils at Southall Community College with skills in retrofitting and energy efficiency. This could create significant employment opportunities for Southall's residents, helping to diversify the activities and specialisms of existing local construction businesses.

Case Study 2: West London Green Skills Hub

- The West London Green Skills Hub, part of the Mayor's Academies Programme, was launched today at West London College (31 January 2022). This £44m Programme will support Londoners into good jobs in sectors key to London's recovery.

- The West London Green Skills Hub is dedicated to improving employment opportunities, reskilling the workforce, boosting West London's economy and playing its role in helping to achieve the Mayor's net zero target for carbon emissions by 2030.

- Initial focus will be on five key components of the future green economy: Retrofitting and Energy Efficiency; low carbon transport; Green spaces; circular economy; light green skills. Each area will have an industry lead which will help to define short, medium, and long-term skills needs.

Ealing

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