OPDC
OLD OAK AND PARK ROYAL DEVELOPMENT CORPORATION

Socio Economic Baseline Study

LOCAL PLAN SUPPORTING STUDY

June 2018

MAYOR OF LONDON

48. Socio Economic Baseline Study

Document Title	Socio Economic Baseline Study
Lead Author	GLA Economics
Purpose of the Study	To provide a baseline of socio-economic and demographic indicators against which to measure the impacts of the Old Oak and Park Royal regeneration project over time.
Key outputs	The report assesses both the OPDC Area and OPDC Region against a number of social economic indicators, which are categorised within the following sections: • Geography: The area has a low population density due to its highly commercial nature. • Population and Demographics: The local community within the area is typically younger, and more ethnically diverse than the London average. • Housing: Households in the area typically larger than the London average, and residents are more likely to be living in socially rented accommodation. • Income and Employment: The area has lower household incomes than the London average, along with a higher proportion of long-term unemployment. • Community: Levels of education in the area are below the London average, as is the health of the general community. • Transport: The area has greater access to transport compared to the London average due to the high number or train stations. • Business: There are over 52,000 people employed in the area across 2,250 enterprises, primarily in the areas of wholesale and retail trade, and manufacturing industries. Generally, the study indicates that when compared to the Greater London, the OPDC Region and in particular the OPDC Area, is disadvantaged across a number of different indicators.
Key recommendations	• The report does not make recommendation as it is a baseline assessment of current socio-economic conditions. The indicators outlined in the study are intended to be measured on an ongoing basis to measure improvements in socio-economic conditions.
Key changes made since Reg 19 (1)	N/A
Relations to other studies	Interfaces with the OPDC Strategic Housing Market Assessment and Future Employment Growth Sectors Study.
Relevant Local Plan Policies and Chapters	• Policy SP1 (Catalyst for Growth), SP4 (Thriving Communities) and SP5 (Resilient Economy); • Introduction chapter • Housing Policies H2 (Affordable housing) and H3 (housing mix); • Town Centre and Community Uses Policy TCC4 (social infrastructure); • All Employment chapter policies

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Socio-economic baseline – Old Oak and Park Royal

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Contents

1 Introduction

The Mayor of London has set out an ambitious vision to use the once-in-a-lifetime opportunity created by the construction of the new world class High Speed 2 (HS2) and Crossrail interchange station at Old Oak Common in 2026, to create:

A thriving part of London connected to the rest of the UK and internationally.

Old Oak and Park Royal will be a centre for innovation and growth that will shape West London and strengthen London's role as a global city.

A new commercial hub with cultural uses, alongside a diverse network of vibrant neighbourhoods, will help create a London destination recognised as an exemplar in large-scale housing and employment-led regeneration.

Over 25,500 new homes and 65,000 new jobs are envisaged to be created across the area over the next 30 years.

Using powers created under the Localism Act 2011, the Mayor created the Old Oak and Park Royal Development Corporation (OPDC) on 1 April 2015 as his second only Mayoral Development Corporation (MDC). The Corporation's mission is to:

- Proactively lead the comprehensive and best practice planning of Old Oak and Park Royal that complements the wider area;
- Enable the delivery of a liveable new place for a mix of residents, employees and visitors, ensuring new development achieves the highest standards of design;
- Work positively with stakeholders to unlock and coordinate the area's regeneration potential;
- Engage with, and support the participation of, local communities during the plan making and development management processes;
- Run a responsive, customer focused planning service.

The objective of this study is to provide a baseline of socio-economic and demographic indicators against which to measure the impacts of the Old Oak and Park Royal regeneration project over time. This baseline will be used as a reference point in future years to measure changes in these indicators to assess the impact that the regeneration project is having on the Old Oak and Park Royal area.

2 Executive Summary

Old Oak and Park Royal is an area of concentrated commercial activity. The development zone itself, currently has a low number of residents and largely represents business activity and infrastructure. As a result, most of the analysis in the paper looks at a slightly larger area to encompass those residents most likely to be affected by the major redevelopment project at Old Oak and Park Royal, catalysed by new High Speed 2 (HS2)/Crossrail station, in order to measure changes into the future.

Generally the socio-economic measures of the area indicate that when compared to Greater London, the area is disadvantaged across a number of different indicators.

Some of this performance can be attributed, at least in part, to the population of the area being younger than the overall London population, with residents up to the age of 30 accounting for 5.3 per cent more of the population when compared to London as a whole. Since 2007, population growth in the area has generally been stronger than overall London population growth, whilst the population density of the area is quite low, this can be attributed to the small amount of residential land and the prominence of commercial land in the area.

Compared to Greater London, the community within the area has a larger share of Black / African / Caribbean / Black British ethnic groups and a lower proportion of white residents. Owner occupation rates are less common than across London, with a larger share of households living in social housing relative to London. This could at least be in part due to the younger age profile of the area. The average household size is slightly larger than the London average, with households also more likely to be overcrowded, which can be attributed to the lower share of households that are owner-occupiers (where overcrowding is less common), and higher rates of overcrowding in the private rented sector. The housing stock has a greater share of flats and terraced houses than across London, whilst median house prices are currently lower than in the surrounding Boroughs. New house building has been taking place within the boundaries of the Old Oak Park Royal development zone over the past year, with 161 new homes completed for the year, 85 per cent of which were for social rent or shared ownership.

Household incomes in the area are lower by around one-quarter when compared to London-wide incomes despite having experienced similar growth in incomes since the economic downturn. This is consistent with lower rates of economic activity, and higher rates of unemployment across most different demographic groups that live in the area. Long-term unemployment is also more common, resulting in a higher share of the population claiming benefits through Job Seekers Allowance or Universal Credit.

Levels of education tend to be below London averages in terms of both results for students still in school, and the level of qualifications that have been obtained for the working-age population. The health of the community in the area is also below London average levels, with the rates of disability or long-term illness, and childhood obesity higher than London averages. Life expectancy in the area was also lower, whilst the average rate of deprivation in the area places it in the most deprived 20 per cent of areas in London.

There is greater access to transport in the area when compared to the average across London, which is likely due to the number of tube stations in the area, with journeys into the area on the tube or overground more common than journeys leaving the area. Usual residents are less likely to have access to a vehicle, whilst on a per capita basis road accidents are more common than at the wider London level, but this is at least in part due to the low population density and commercial nature of the area. Over a third of land within the Old Oak Park Royal development zone is designated for manufacturing use alone. It is estimated the area generated £2.58 billion worth of economic activity in 2012, predominantly driven by industries, such as information and communication, wholesale and retail trade, and manufacturing. There are over 52,000 people employed in this commercial area, employed by 2,250 different enterprises. Wholesale and retail trade and manufacturing industries were the largest in the area in terms of the number of people employed.

3 Glossary

3.1 Geographical terms

- **3 Boroughs:** this refers to the three boroughs in which the OPDC Development Zone crosses: Brent, Ealing, and Hammersmith and Fulham.

- **MSOAs:** MSOA stands for middle super output area. This is a geographical level used by the ONS for small area statistics. The area an MSOA covers is based on the population and number of households in an area. Thresholds require that a MSOA must have a population between 5,000 and 15,000 people, and between 2,000 and 6,000 households.

- **OPDC Development Zone:** the area over which the OPDC has been granted planning powers through a statutory instrument of Parliament, as shown in Map 1.

- **OPDC Area:** the area that includes the statistical areas that cover the majority of the OPDC Development Zone. This area also includes some parts which lie outside the OPDC Development Boundary, with most of the households within these areas placed outside the OPDC Development Boundary. However, this is the most suitable area to analyse to measure changes that take place within the OPDC Development Zone into the future. Depending on the type of data that is being analysed, MSOAs or Wards, the OPDC Area is slightly different reflecting the different statistical area that's being used. The OPDC Area for MSOAs is defined in Map 2, and for Wards is defined in Map 3.

- **OPDC Region:** this is a wider area that surrounds the OPDC Development Zone and comprises 35 MSOAs or 25 Wards (including the three in the OPDC Area). This is the most suitable area to analyse to capture the broader impacts of development taking place within the OPDC Development Zone.

- **Strategic Housing Market Assessment (SHMA):** study undertaken to identify the objective housing need, and the required housing supply including the provision of affordable housing to meet this need. The SHMA is then used to inform the OPDC local plan.

3.2 Indicator terms

- **Bedroom standard:** Is defined in the Housing (Overcrowding) Bill of 2003 which states that "a separate bedroom shall be allocated to the following persons—
  a) A person living together with another as husband and wife (whether that other person is of the same sex or the opposite sex)
  b) A person aged 21 years or more
  c) Two persons of the same sex aged 10 years to 20 years
  d) Two persons (whether of the same sex or not) aged less than 10 years
  e) Two persons of the same sex where one person is aged between 10 years and 20 years and the other is aged less than 10 years
  f) Any person aged under 21 years in any case where he or she cannot be paired with another occupier of the dwelling so as to fall within (c), (d) or (e) above."

- **Mixed/multiple ethnic groups:** the ONS categorises mixed/multiple ethnic groups to include people of mixed ethnic groups. Sub categories of this group include:
  a) White and Black Caribbean

b) White and Black African
c) White and Asian
d) Another other Mixed/Multiple ethnic background.

- **Other ethnic groups:** the ONS categorises other ethnic groups to include people that are from the following ethnic groups:
  a) Arab
  b) Any other ethnic group

- **Economically inactive:** A person aged 16 and over is described as economically inactive if, in the week before the census, they were not in employment but did not meet the criteria to be classified as "Unemployed". This includes a person looking for work but not available to start work within two weeks, as well as anyone not looking for work, or unable to work - for example retired, looking after home/family, permanently sick or disabled. Students who fulfil any of these criteria are also classified as economically inactive. This does not necessarily mean they were in full-time education and excludes students who were working or in some other way economically active.

- **Unemployed:** A person aged 16 and over is classified as unemployed if they are not in employment, are available to start work in the next two weeks, and either looked for work in the last four weeks or is waiting to start a new job.

- **Long-term unemployed:** A person is defined as long-term unemployed at the time of the 2011 Census if they were unemployed and the year they last worked was 2009 or earlier.

- **Elementary occupations:** This major group covers occupations which require the knowledge and experience necessary to perform mostly routine tasks, often involving the use of simple hand-held tools and, in some cases, requiring a degree of physical effort. Most occupations in this major group do not require formal educational qualifications but will usually have an associated short period of formal experience-related training.

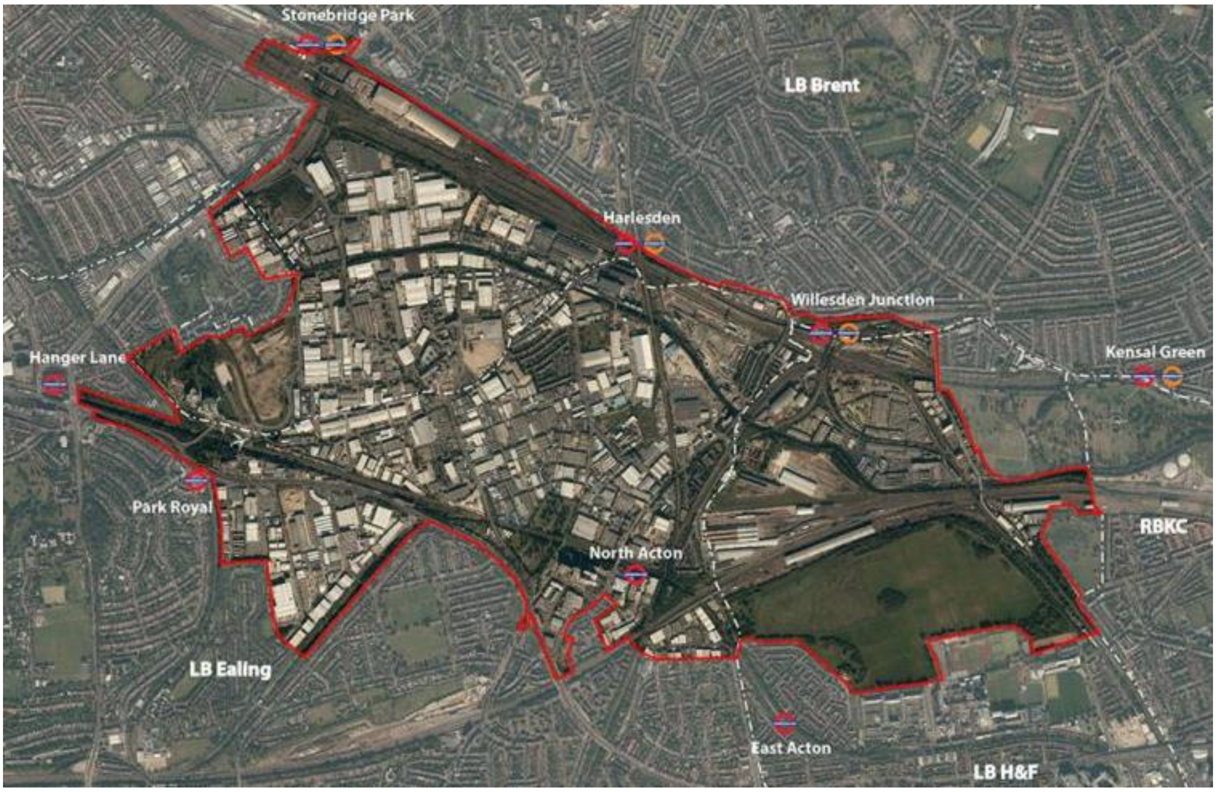
- **Excess weight:** in terms of childhood obesity, a child is considered to have excess weight if their body mass index (BMI) is equal to or greater than $25kg/m^2$.

- **Obese:** in terms of childhood obesity, a child is considered to be obese if their BMI is equal to or greater than $30kg/m^2$.

4 Methodology

The OPDC Development Zone covers 655 hectares and is located in West London in the Old Oak Common and Park Royal area. It lies within the borders of three different London boroughs: Brent, Ealing, and Hammersmith and Fulham.

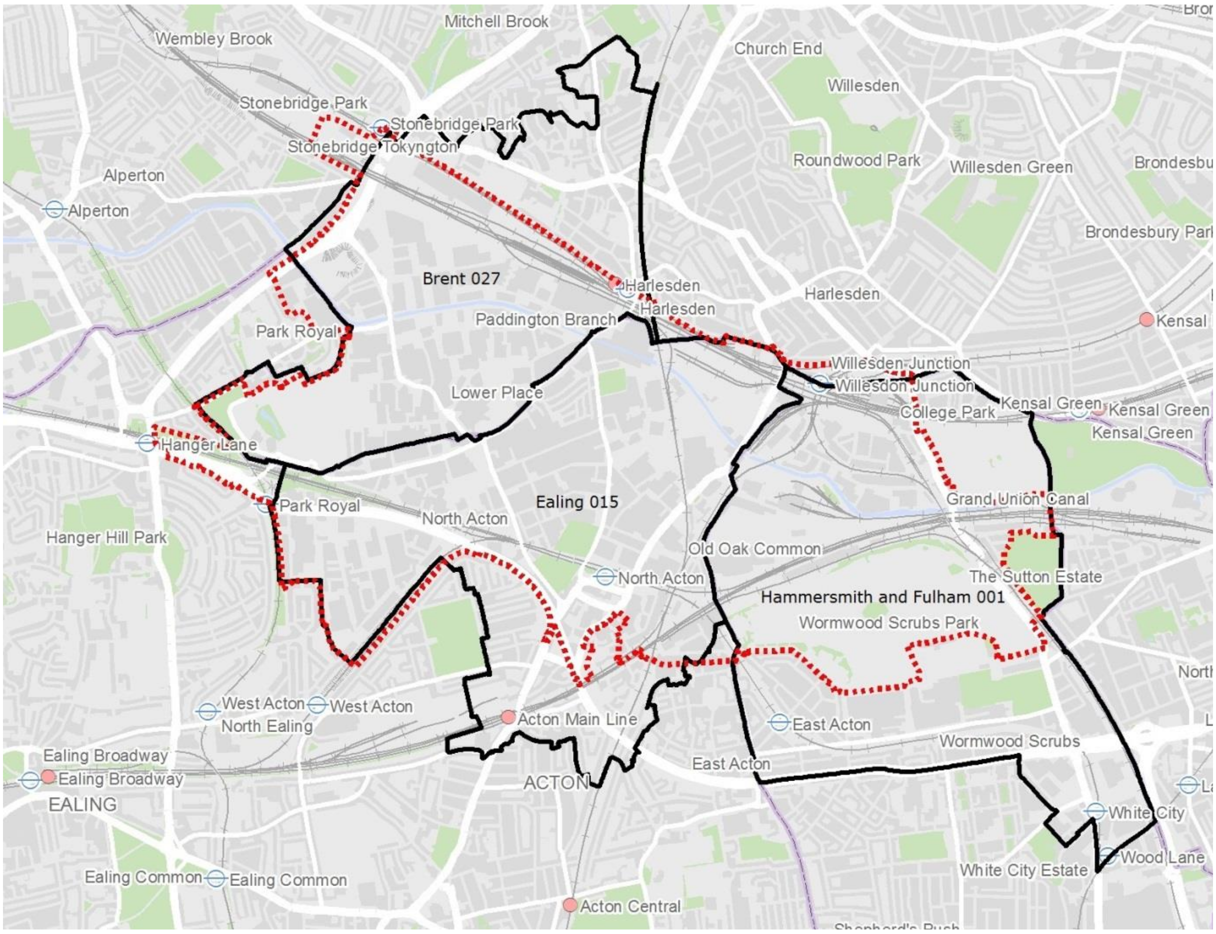
Map 1: Aerial view of OPDC Development Zone



The development area lies in a difficult location in terms of data analysis. As the Development Zone lies across three different Boroughs, Borough level data is not useful for any robust analysis of this specific area. In order for data to be robustly identified to apply for this analysis, it needs to be available at either the middle-super output area (MSOA), at ward level, or lower levels of geography. As the greatest number of indicators is available at these geographic levels, MSOA and ward level data was chosen as the geographic levels to use for this analysis.

In terms of MSOAs, there are three that cover the majority of the OPDC Development Zone, one in each of the London Boroughs that intersect the Development Zone. These MSOAs have been designated by the Office of National Statistics (ONS) as Brent 027, Ealing 015, and Hammersmith and Fulham 001. However, these three areas also cover land that lies outside the OPDC Development Zone. There are also some areas within the development area not captured within these MSOAs, however these areas are relatively small, and mostly contain rail infrastructure, so are unlikely to impact on the measurement of the demographic baseline of the area (see Map 2).

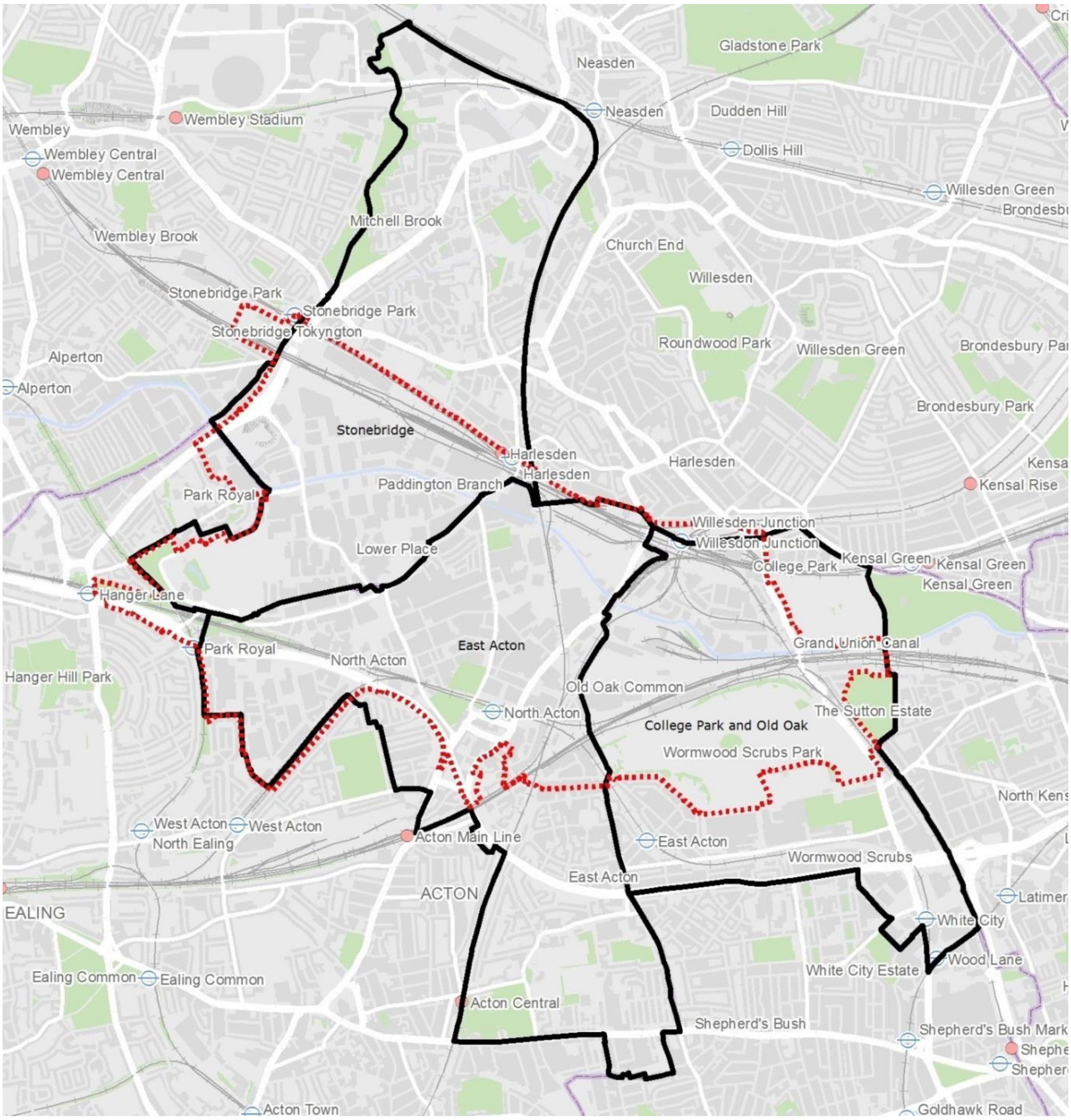
Map 2: MSOAs that lie within the OPDC development area



However, the majority of the residents within these MSOAs lie outside the OPDC development zone, with just 2 per cent of land within the boundaries designated for residential use. It is estimated that there are around 3,900 people that live within the OPDC development zone. This represents only around 14 per cent of the 27,565 people living in the three MSOAs that cover the development area. This low share of population of the broader statistical areas makes it difficult to match the local population within the development zone to the statistics available at MSOA level.

Similar issues exist for Ward level data. There are three wards which cover the majority of the development area (College Park and Old Oak, East Acton, and Stonebridge). Again, like with the three MSOAs that cover the majority of the development zone, there are some small parts of the development zone which are not covered by these wards, and the majority of the population within these wards lies outside the development area (Map 3).

Map 3: Wards that lie within the OPDC development area

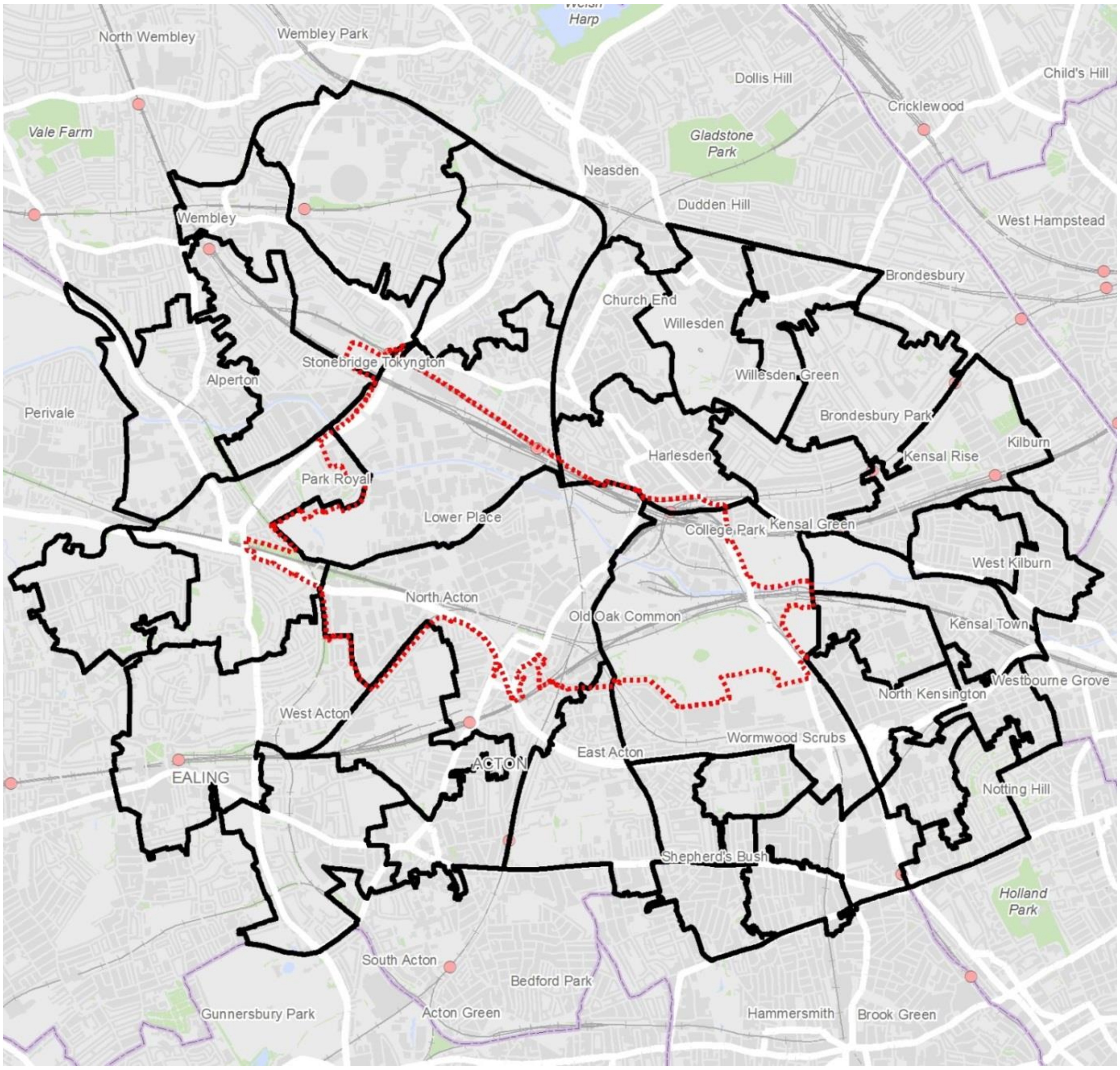


In contrast to the small amount of residents within the OPDC Development Zone, business activity is far more common, with manufacturing alone comprising over 36 per cent of land use within the zone. Furthermore, for the identified OPDC Area there is minimal land use for business purposes that lies outside the OPDC Development Zone itself. Therefore, unlike the indicators for residents in the area, the data available for the OPDC Area will give quite an accurate picture of the activity that takes place within the OPDC Development Zone.

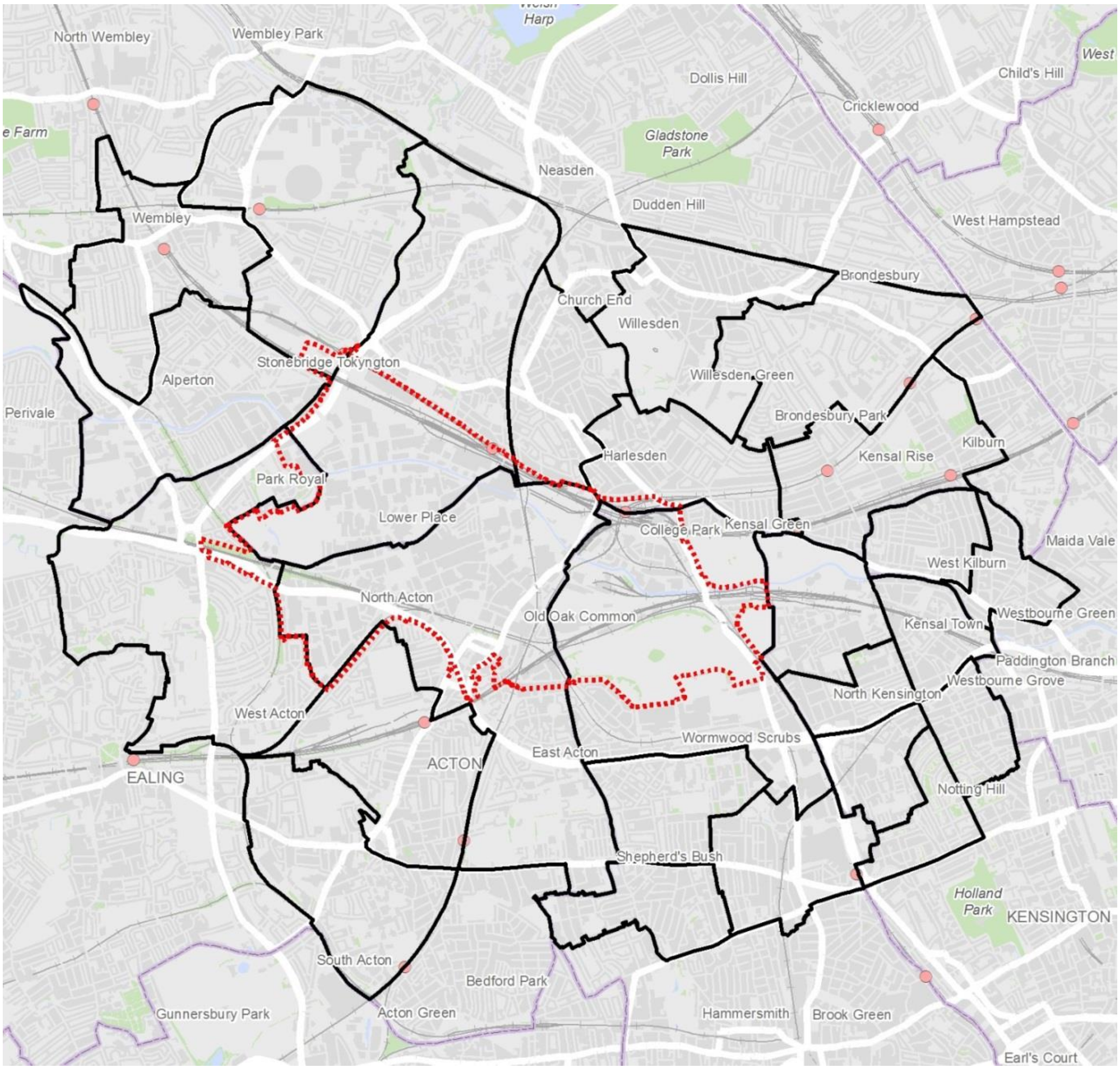
Given the issues with MSOA and Ward boundaries for residential indicators, and the likelihood that the benefits of development within the OPDC development zone will spread beyond the zone into the broader area, a two level approach has been adopted to analyse the socio-economic indicators of the area. The first level involves analysing the data from the three MSOAs and wards that have been identified above. The second level involves analysing the OPDC development area and the wider region that surrounds it, to capture the spill-over effects from the OPDC Development Zone into the wider region. Maps of the area defined as the wider OPDC region for MSOAs are included at Map 4, and for Wards at Map 5.

The majority of the analysis in this document is based on MSOA geographies. Where Ward data has been used as an alternative, this is specified within the analysis.

Map 4: MSOAs identified in OPDC Region



Map 5: Wards identified in OPDC Region



The OPDC Area and OPDC Region identified in this report differ from the geographies used in the OPDC Strategic Housing Market Assessment (SHMA). The OPDC Area in this report geographically is slightly larger than the OPDC Area defined in the SHMA. The difference is due to this report being based on the MSOAs that fall within the development zone, whilst the SHMA uses the smaller geography of output areas to describe the OPDC area. This report uses MSOA level geographies to ensure consistency across indicators, because many of the data sources used in this report are only available at MSOA level. Therefore the OPDC Area in this report includes some people that live just outside the development zone, which are not captured in the OPDC Area in the SHMA.

At a wider level, the OPDC Region is a collection of MSOAs that surround the OPDC Development Zone, selected based on their proximity to the development zone regardless of which Borough they lie. This is different to the geography defined in the OPDC's SHMA, which is based on the administrative boundaries of the three Boroughs which lie within the development zone. Maps which compare the difference in these geographies are included in the Appendix.

5 Analysis

In order to understand the socio-economic characteristics of the OPDC area, a wide variety of statistics have been analysed. However, given the size of the area is small in geographic terms, this limits the number of indicators that are able to provide both robust and timely estimates. Where timely data for desired indicators was not available, data from the 2011 Census has been used where possible.

The following indicators have been included in the socio-economic baseline on the basis of meeting the above criteria.

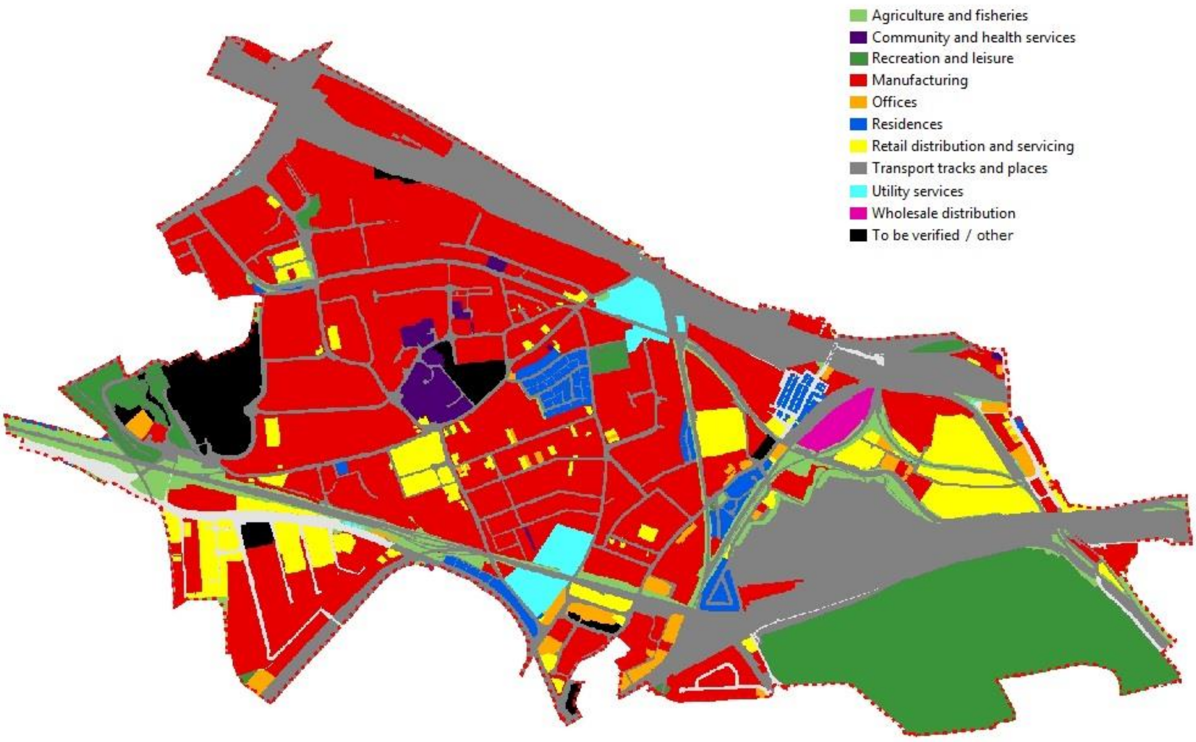
Table 1: List of indicators for analysis

Geography	**Community**
Land Use	Education Qualifications Disability or long-term illness Life expectancy Childhood obesity Deprivation Crime
Population and demographics	**Transport**
Population Population growth Population density Migration Ethnicity	Access to public transport Train journeys Fatalities and serious injuries on roads Access to a vehicle
Housing	**Business**
Housing tenure Average household size Occupancy rating Housing stock Housebuilding activity House prices Broadband	Gross value added Employment Enterprises
Income and employment	
Household income Economic activity and employment Economic activity by age Economic activity by ethnicity Economic activity by disability or long-term illness Unemployment at Borough level Long-term unemployment Claimant count Occupation	

5.1 Geography

Of the 655 hectares within the Development Zone, over a third of the land is designated for manufacturing use (36.3 per cent), with transport tracks and places comprising almost another third of the land (32.4 per cent). The land designated for housing use is small at just 2.0 per cent of land within the Development Zone, and in terms of green space, agriculture and fisheries and recreation and leisure comprise 15.6 per cent of the land, which is primarily due to Wormwood Scrubs Park which lies at the south-east end of the Development Zone. Land use in the zone is shown in Map 6 and in Table 2.

Map 6: Land use within the OPDC Development Zone



Source: 2015 UK Map, GeoInformation Group

Table 2: Designated land use type, OPDC Development Zone

Designated land use Type	Hectares	Percentage
Agriculture and fisheries	23.46	3.58
Community and health services	7.03	1.07
Recreation and leisure	78.96	12.05
Manufacturing	238.08	36.34
Offices	9.41	1.44
Residences	13.17	2.01
Retail distribution and servicing	39.51	6.03
Transport tracks and places	212.39	32.42
Utility services	10.21	1.56
Wholesale distribution	3.24	0.49
To be verified / other	19.71	3.01
Total	**655.18**	**100.00**

Source: 2015 UK Map, GeoInformation Group

5.2 Population and demographics

The population of the OPDC Area is generally younger than the overall London population, with younger people comprising a noticeably bigger share of the usual residents, offset primarily by a lower share of people aged 60 years or older. Since 2007, population growth in the area has generally been stronger than overall London population growth. Population density within the OPDC Area is quite low, however this can be attributed to the small amount of residential land that currently lies within the OPDC Development Zone boundary. The community within the ODPC Area has a lower proportion of white residents, which is offset by the Black / African / Caribbean / Black British ethnic groups which make up a larger share of the population, relative to Greater London.

5.2.1 Population

The population of the OPDC Area was 27,565 in 2014, of which it is estimated that around 3,900 live within the development zone[1]. In the wider OPDC Region the population was 318,120 people. For the OPDC Area, younger people account for a higher share of the population, with those aged under 29 accounting for 5.3 per cent more of the population compared to London, whilst those aged between 30 to 59 make up 1.5 per cent less of the population. People aged 60 years and over were also less common than in London, accounting for 3.5 per cent less of the people in the Area when compared to London as a whole.

Within the wider OPDC Region, the proportion of people between the ages of 30 and 59 accounts for 1.2 per cent more of the population when compared to London, whilst people 60 years or older account for 1.0 per cent less of the population, whilst those under the age of 20 account for 0.2 per cent less of the total population.

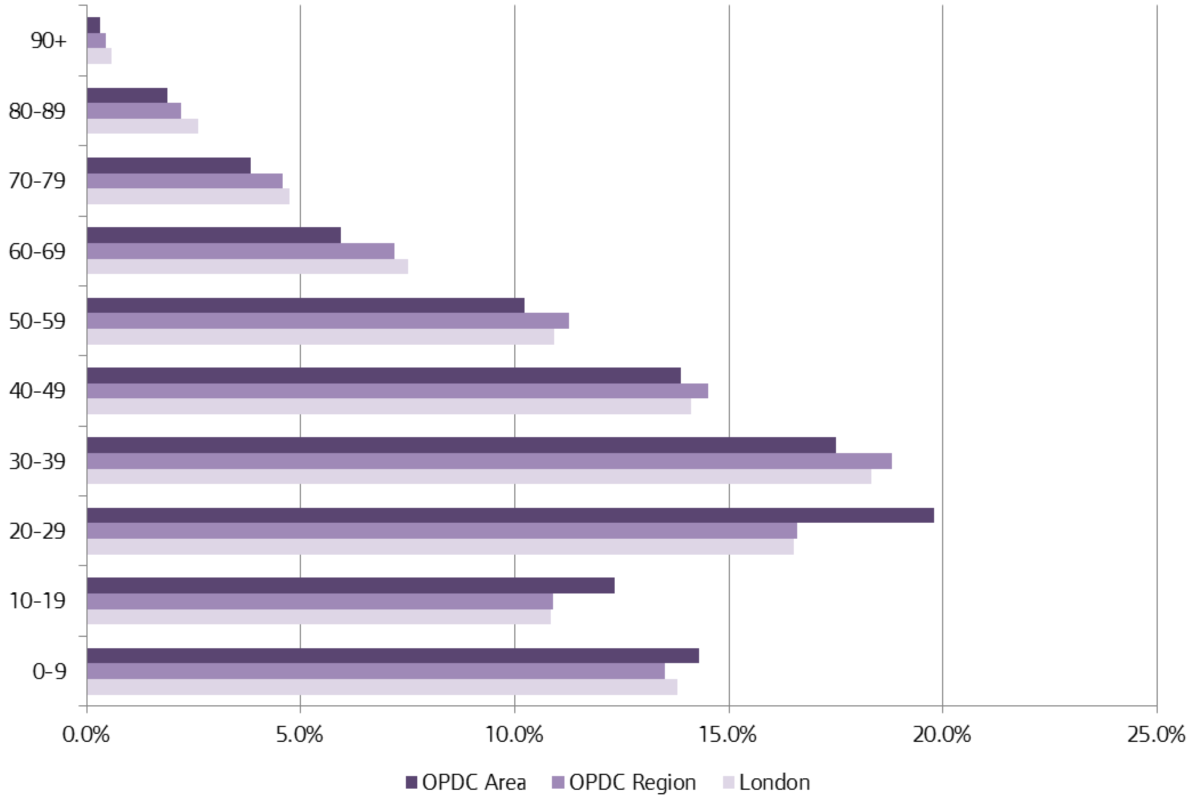
[1] This population estimate differs from the estimate in the SHMA of around 7,000 people that live within the OPDC development zone. The estimate in the SHMA includes some land that lies outside the OPDC boundaries, whilst this report includes an estimate of residents that live inside the development zone only.

Table 3: Population by age 2014

Age	OPDC Area		OPDC Region		London	
	Number	%	Number	%	Number	%
0-9	3,947	14.3%	42,968	13.5%	1,177,571	13.8%
10-19	3,401	12.3%	34,631	10.9%	926,236	10.8%
20-29	5,455	19.8%	52,786	16.6%	1,411,361	16.5%
30-39	4,823	17.5%	59,833	18.8%	1,564,589	18.3%
40-49	3,827	13.9%	46,154	14.5%	1,205,726	14.1%
50-59	2,817	10.2%	35,817	11.3%	932,421	10.9%
60-69	1,634	5.9%	22,851	7.2%	640,519	7.5%
70-79	1,054	3.8%	14,585	4.6%	403,852	4.7%
80-89	522	1.9%	7,065	2.2%	222,021	2.6%
90+	85	0.3%	1,430	0.4%	49,815	0.6%
Total	**27,565**		**318,120**		**8,534,111**	

Source: GLA Datastore from the ONS

Figure 1: Population by age, 2014

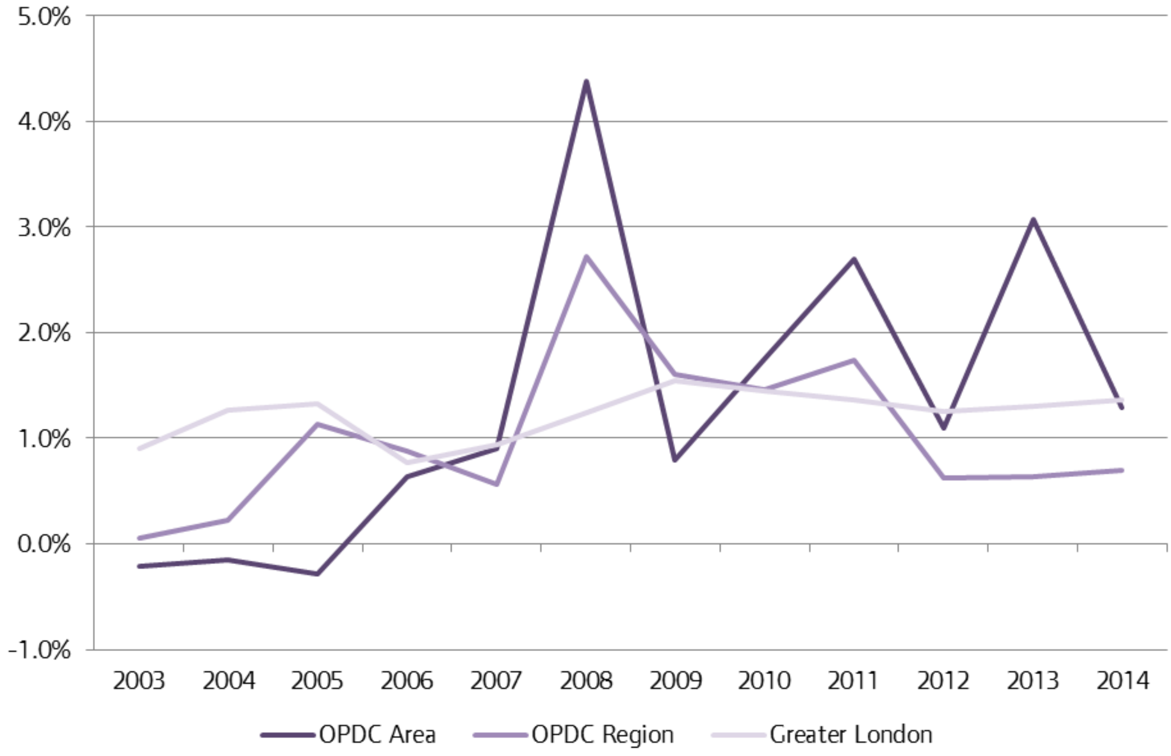


Source: GLA Datastore from the ONS

5.2.2 Population growth

As would be expected, population growth has been more volatile in the development area and the wider region than at London level. For the OPDC Area, the population declined each year between 2003 and 2005. Whilst in the wider OPDC Region the population increased over this period, it did so at a slower rate than population growth across Greater London (Figure 2). However, over the past decade, population growth has been stronger in the OPDC Area, growing by an average of 1.6 per cent a year between 2004 and 2014, peaking at 4.4 per cent in 2008. Over the same period the population of the OPDC Region grew at an average of 1.2 per cent a year, whilst Greater London increased by 1.3 per cent a year on average.

Figure 2: Population growth, 2003 – 2014

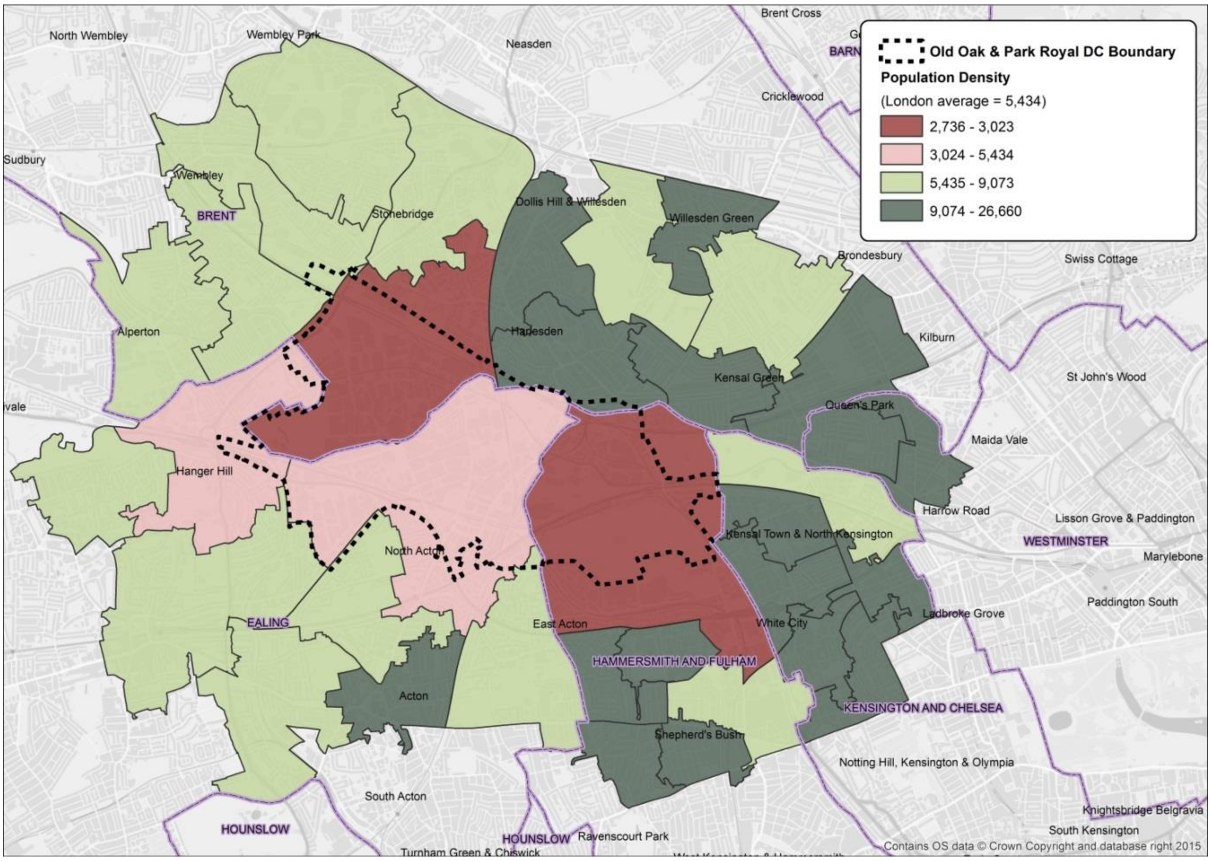


Source: GLA Datastore from the ONS

5.2.3 Population density

For the OPDC Area the population density in 2014 was relatively low at 2,994 people per square kilometre, whilst the population density of the wider OPDC Region was 8,050 people per square kilometre. The overall London population density in 2014 was 5,434 people per square kilometre, but with the population density of Inner London much higher at 10,621 people per square kilometre. However, the low population density in the OPDC Area is consistent with residential land making up just 2 per cent of land that lies within the Development Zone.

Map 7: Population density of OPDC Region



Source: GLA Datastore from the ONS

5.2.4 Migration

In the 12 months prior to the 2011 Census, 3,489 people that were living in the OPDC Area moved home to another home located in the UK[2], whilst 5,691 people moved into the OPDC Area from the rest of the UK and overseas (Table 4).

Table 4: Migration in and out of the OPDC area and Region, 2011 Census

	Out					
In	OPDC Area	OPDC Region	Rest of London	Rest of the UK	Outside the UK	Total
OPDC Area	392	903	2,729	477	1,190	5,691
OPDC Region	842	11,522	20,185	5,831	9,007	47,387
Rest of London	1,692	21,383	794,732	181,037	187,440	1,186,284
Rest of the UK	563	5,781	207,354	..	..	213,698
Total	3,489	39,589	1,025,000	187,345	197,637	

Source: 2011 Census

[2] As the Census only records those currently living in the UK, only those that have migrated into the UK can be recorded, as those that have left the UK are not captured by the Census.

Of this group, 11.2 per cent remained within the OPDC Area, 24.1 per cent moved outside of the OPDC Area, but remained within the OPDC Region, 48.5 per cent moved to other parts of London, whilst 16.1 per cent moved to other locations in the UK outside of London (Table 5).

Table 5: Share of migration out of the OPDC area and Region, 2011 Census

Out	OPDC Area	OPDC Region	Rest of London
OPDC Area	11.2%	2.3%	0.3%
OPDC Region	24.1%	29.1%	2.0%
Rest of London	48.5%	54.0%	77.5%
Rest of the UK	16.1%	14.6%	20.2%

Source: 2011 Census

Of the group that moved into the OPDC Area, 6.9 per cent were already living in the OPDC Area, 15.9 per cent were living in the wider OPDC Region, 48.0 per cent were previously living in the rest of London, 8.4 per cent were living elsewhere in the UK, and 20.9 per cent moved into the area from overseas. These statistics and others for migration in the OPDC Region can be found in Tables 4 to 6.

Table 6: Share of migration into the OPDC Area and Region, 2011 Census

	In				
	OPDC Area	OPDC Region	Rest of London	Rest of the UK	Outside the UK
OPDC Area	6.9%	15.9%	48.0%	8.4%	20.9%
OPDC Region	1.8%	24.3%	42.6%	12.3%	19.0%
Rest of London	0.1%	1.8%	67.0%	15.3%	15.8%

Source: 2011 Census

5.2.5 Ethnicity

Determining the ethnicity of the area is only possible using data collected in the 2011 Census. Both the OPDC Area and Region have a lower proportion of white residents, at 42 per cent and 49 per cent respectively compared to the overall London proportion of 60 per cent, and 57 per cent within Inner London. This is offset in the most part by a higher share of residents that identify as Black / African / Caribbean / Black British, which account for 28 per cent in the OPDC area and 19 per cent in the Region, compared to 13 per cent across wider London, and 17 per cent within Inner London.

Table 7: Population share by ethnicity, 2011 Census

Share of population	White:	Mixed / multiple ethnic groups:	Asian or Asian British:	Black / African / Caribbean / Black British:	Other ethnic group:
OPDC Area	42%	7%	15%	28%	8%
OPDC Region	49%	6%	19%	19%	7%
Inner London	57%	6%	16%	17%	4%
London	60%	5%	18%	13%	3%

Source: 2011 Census

5.3 Housing

Owner occupation rates are less common within the OPDC Area, with this offset by a larger share of households living in social housing relative to London. The average household size is slightly larger than the London average, with households also more likely to be overcrowded compared to Greater London levels. The housing stock has a greater share of flats and terraced houses than across London, whilst median house prices are currently lower than in the surrounding Boroughs[3]. New house building has been taking place within the OPDC Development Zone over the past year, with 161 new homes completed for the year, 85 per cent of which were for social rent or shared ownership.

5.3.1 Housing tenure

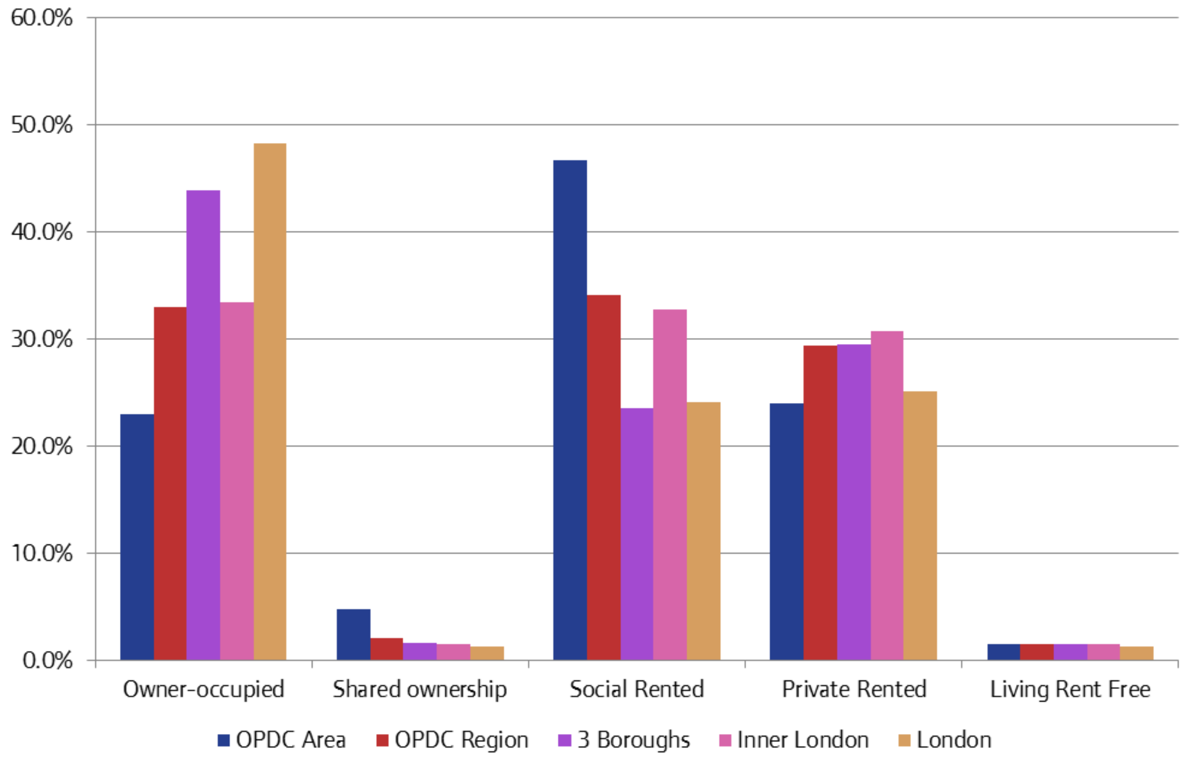
For both the OPDC Area and the OPDC Region, households are less likely to own their own home and are more likely to be social renters compared to the wider-London average. According to the 2011 Census, in the OPDC Area 23.0 per cent of households own their own home, compared to 33.0 per cent in the OPDC Region, and 43.9 per cent across the three Boroughs the OPDC Area covers. When compared to London overall, home ownership is much higher at 48.3 per cent across the city, and is also higher in Inner London as a whole (33.5 per cent). Some of this difference could be explained by the younger age profile of the residents of the OPDC Area when compared to Greater London.

Households living in social housing are more common in the OPDC Area, comprising 46.7 per cent of all households, compared to 34.2 per cent in the OPDC Region, and 23.6 per cent of households in the three adjoining boroughs. A similar trend is observed when comparing against tenure in Greater London, where 24.1 per cent of households are social tenants, with the 32.8 per cent of households that live in social housing in Inner London still lower than the rate of the ODPC Area.

The share of households that rent privately is broadly similar to those across London, with 24.0 per cent of households in the OPDC Area renting privately, compared to 29.4 per cent in the OPDC Region, and 25.1 per cent across London. The proportion of households renting privately is similar to the ODPC Region across the three adjoining Boroughs (29.5 per cent) and also in Inner London (30.7 per cent) (Figure 3).

[3] This is a different measure to house prices used in the SHMA in two ways. Firstly, this is a measure of median house prices rather than lower-quartile house prices used in the SHMA. Secondly, this statement reflects the prices in the OPDC Area whilst the SHMA analyses prices across the entire housing market area encompassing the boroughs of Brent, Ealing, and Hammersmith and Fulham.

Figure 3: Household tenure, 2011 Census



Source: 2011 Census

5.3.2 Average household size

In 2011, the average number of people per household was broadly similar across all three areas, but was slightly higher in the OPDC Area at 2.57 people per household, compared to 2.49 people per household in the wider region, and 2.47 people per household across London. The Inner London average household size was also lower than the OPDC Area at 2.33 people per household, but was higher in the 3 Boroughs where the OPDC Development Zone lies at 2.62 people per household[4].

5.3.3 Occupancy Rating

According to the 2011 Census households within the OPDC Area are more likely to be over occupied relative to Greater London, based on the bedroom standard[5]. In the OPDC Area, 16.6 per cent of households were considered to have an insufficient number of bedrooms to house the people that lived there, compared to 13.5 per cent in Inner London and 11.3 per cent across Greater London. This was offset by the 33.6 per cent of households that had surplus bedrooms, compared to 49.4 per cent of households across Greater London and 39.8 per cent in Inner London households that had more bedrooms than are considered to be needed.

[4] 2011 Census

[5] The bedroom standard is defined in the Housing (Overcrowding) Bill of 2003, which outlines the number of bedrooms that are deemed to be sufficient for households based on their composition. See the glossary for more detail.

Table 8: Occupancy rating, 2011 Census

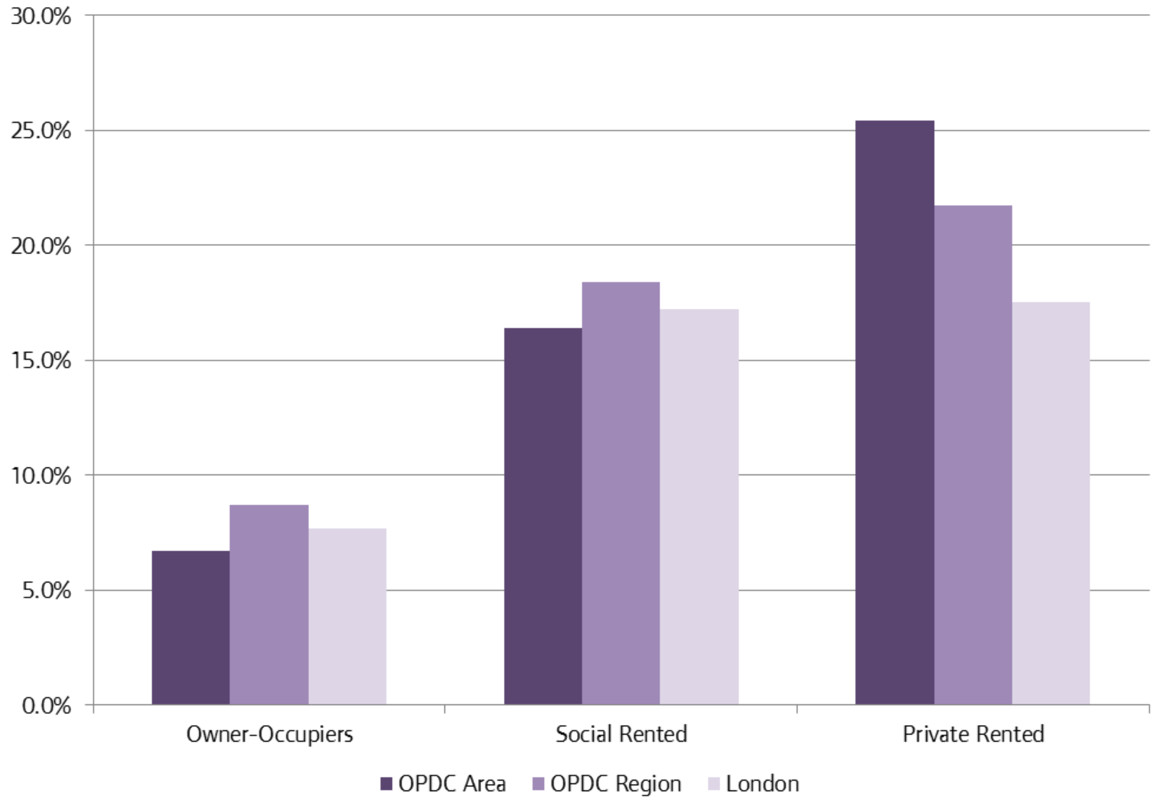
	Bedrooms of +2 or more	Bedrooms of +1	Bedrooms of 0	Bedrooms of -1	Bedrooms of -2 or less
OPDC Area	11.2%	22.4%	49.8%	13.1%	3.5%
OPDC Region	14.6%	23.1%	46.6%	12.4%	3.2%
3 Boroughs	18.7%	25.1%	41.4%	11.6%	3.2%
Inner London	14.3%	25.5%	46.7%	11.0%	2.6%
London	21.1%	28.3%	39.3%	9.2%	2.1%

Source: 2011 Census

The higher rate of overall overcrowding in the OPDC Area may be attributed to the lower proportion of owner-occupiers living in the area, and the higher instance of overcrowding in the private rented sector compared to Greater London. Rates of overcrowding are more common in both the social and private rented sectors at around 17 per cent, compared to around 8 per cent for owner-occupiers across London. Therefore the lower share of owner-occupation in the OPDC Area is likely to result in overall rates of overcrowding that are higher compared to Greater London due to the tenure mix of the area.

This can be seen with 16.4 per cent of households living in the social rented sector in the OPDC Area that were overcrowded, lower than the average across London of 17.2 per cent. However, given that almost half of all households in the OPDC Area live in social housing, this is likely to increase the overall rate of overcrowding. Also driving the higher rate of overcrowding is a higher rate of overcrowding in the private renting households of the OPDC Area (25.4 per cent), when compared to the London average of 17.5 per cent. However, overcrowding was more common in the OPDC Region than London averages across all three tenures (Figure 4).

Figure 4: Share of households with insufficient bedrooms, by tenure, 2011 Census



Source: 2011 Census

5.3.4 Housing stock

For the OPDC Area there were a total of 11,010 dwellings recorded in the 2011 Census. Of these dwellings there were 6,390 flats which comprised 58.0 per cent of the housing stock, with 3,670 terraced houses accounting for another third of the housing stock. These shares of the overall housing stock are higher when compared to the housing stock than at the Greater London level. Within the OPDC region there were 131,330 domestic properties. More than two-thirds of these homes (68.4 per cent) were flats which total 89,830, which is a higher proportion than Greater London. Terraced houses account for 20.5 per cent of the homes in the region, whilst detached and semi-detached homes made up 9.3 per cent, both of these categories were lower than the share across Greater London.

Table 9: Housing stock by type, 2011 Census

	OPDC Area		OPDC Region		London	
	Number	%	Number	%	Number	%
Flats	6,390	58.0	89,830	68.4	1,862,340	53.4
Terraced Houses	3,670	33.3	26,950	20.5	927,150	26.6
Detached and semi-detached houses	620	5.6	12,170	9.3	595,020	17.1
Other	330	3.0	2,360	1.8	102,070	2.9
Total	11,010		131,330		3,486,580	

Source: 2011 Census

5.3.5 House building activity

Within the OPDC development Zone itself there were 12 homes that commenced building during the 2014/15 financial year[6]. Of these starts, 3 replaced existing homes, meaning that 9 additional homes will be added to the housing stock from building that commenced during the 2014/15 year. All of these homes were market built homes, with none of them being built as social homes or intermediate homes (shared ownership).

Within the OPDC Area (which includes the development zone), there were 71 market homes that commenced construction, with 64 of these to be additional to the housing stock. Across the wider OPDC Region there were 552 homes that commenced construction with 401 of these being additional to the housing stock, and 113 constructed as intermediate or socially rented homes. According to the planning permissions database, no affordable rent homes were started across the region in 2014/15. Across the Boroughs of Brent, Ealing and Hammersmith and Fulham, there were a total of 1,006 homes started during the year, of which 795 would be additional to the dwelling stock (Table 10).

Table 10: Housing starts by tenure, 2014/15

		OPDC Development Zone	OPDC Area	OPDC Region	3 Boroughs
Number of Starts	Affordable Rent	0	0	0	10
	Intermediate (Shared ownership)	0	0	54	119
	Market	12	71	439	790
	Social Rented	0	0	59	87
	Total	12	71	552	1,006
Existing Units on Site	Affordable Rent	0	0	0	0
	Intermediate (Shared ownership)	0	0	0	0
	Market	3	7	81	211
	Social Rented	0	0	2	0
	Total	3	7	83	211
Net Additions from Starts	Affordable Rent	0	0	0	10
	Intermediate (Shared ownership)	0	0	54	119
	Market	9	64	290	579
	Social Rented	0	0	57	87
	Total	9	64	401	795

Source: GLA London Development Database

In terms of completions, there were 161 homes in the OPDC Development Zone completed during the 2014/15 financial year, with only 5 homes removed this added 156 homes in net terms to the housing stock in the area. In terms of tenure shared ownership was the most common comprising 70 of these homes, 68 were for social rent, whilst 23 were built by private house builders for sale or rent at market prices.

In the OPDC Area, there were 279 homes completed in 2014/15, 273 of which were net additions, whilst in the wider region there were 2,117 homes completed of which 1,889 were

[6] The data on housing starts and completions comes from the London Development Database. This is a live database and can change as new permissions are lodged, however entries are usually made within six months of the activity taking place. For this time lag, the 2014/15 financial year has been chosen for the baseline.

net additions. This is over half the number of net dwellings completed across the three Boroughs of Brent, Ealing and Hammersmith and Fulham (Table 11).

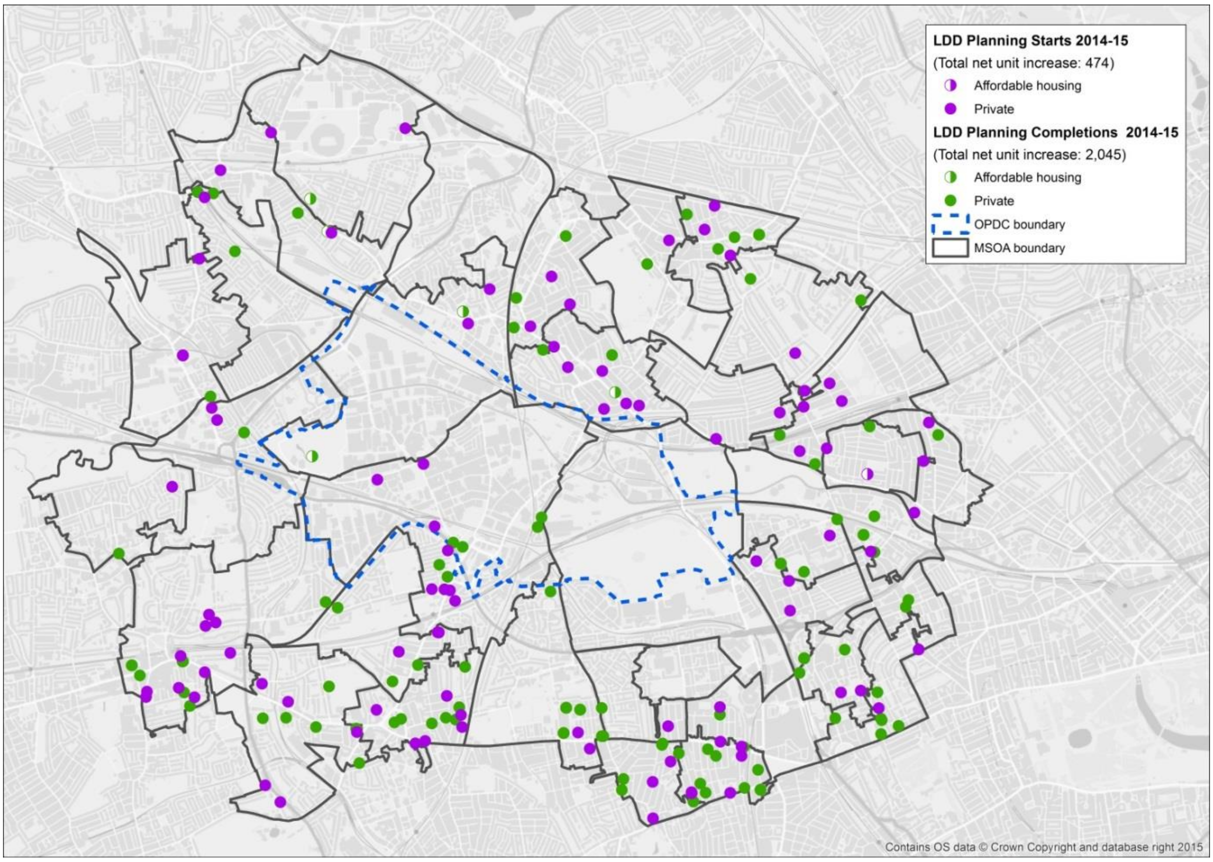
Table 11: Housing completions by tenure, 2014/15

		OPDC Development Zone	OPDC Area	OPDC Region	3 Boroughs
Number of completions	Affordable Rent	0	35	104	148
	Intermediate (Shared Ownership)	70	70	239	489
	Market	23	79	1,488	2,648
	Social Rented	68	95	286	512
	Total	161	279	2,117	3,797
Existing units on site	Affordable Rent	0	0	0	0
	Intermediate (Shared Ownership)	0	0	80	80
	Market	5	6	146	330
	Social Rented	0	0	2	129
	Total	5	6	228	539
Net additions from completions	Affordable Rent	0	35	104	148
	Intermediate (Shared Ownership)	70	70	159	409
	Market	18	73	1,342	2,318
	Social Rented	68	95	284	383
	Total	156	273	1,889	3,258

Source: GLA London Development Database

The location of where these homes were started and completed during 2014/15 can be seen in Map 8.

Map 8: Housing completions within the OPDC Region, 2014/15



Source: GLA London Development Database

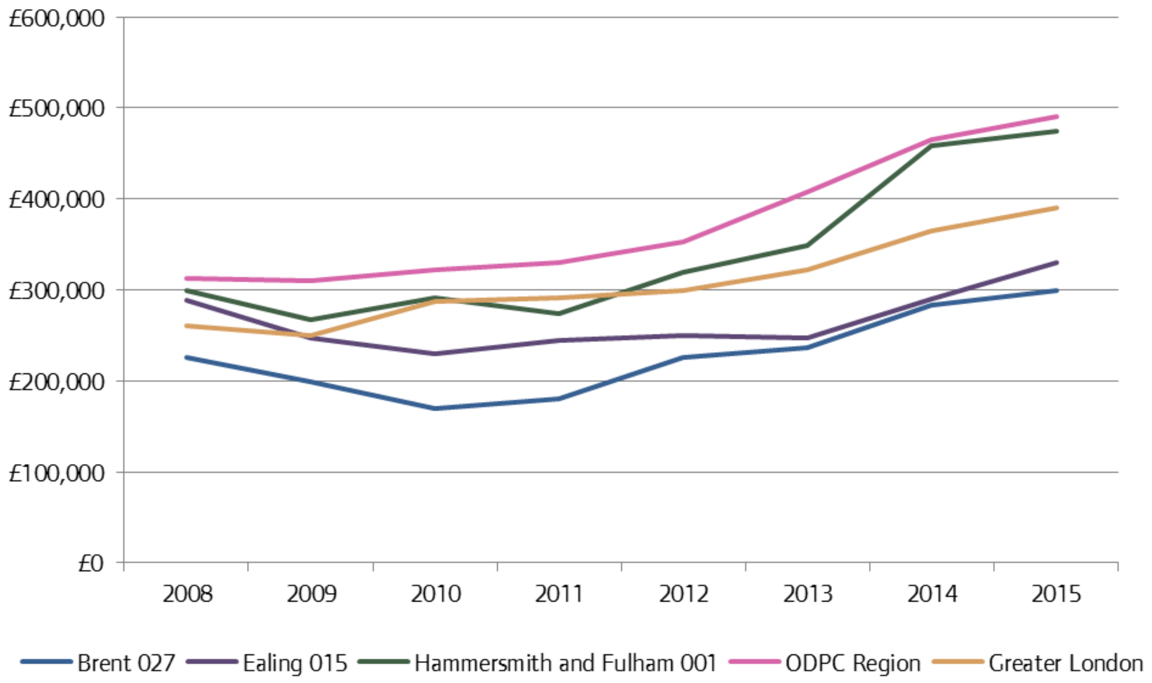
5.3.6 House Prices

Median house prices in the OPDC Area vary from £300,000 in Brent 027, £330,000 in Ealing 015 and £475,000 in Hammersmith and Fulham 001 in 2015[7]. This compares to the median house price of the OPDC Region of £490,000 in 2015, compared to the wider London median house price of £390,000. In the neighbouring boroughs the median house price was £416,000 in Brent, £420,000 in Ealing, and £725,000 in Hammersmith and Fulham.

Since 2008, prices in these MSOAs have increased by 32.7, 14.3 and 58.3 per cent respectively. These rates of growth are all slower than the overall rate of growth in the respective Boroughs for these MSOAs, with Brent growing by 49.9 per cent, Ealing by 55.6 per cent, and Hammersmith and Fulham growing by 66.7 per cent over the period. This compares to a rise in house prices for the wider OPDC Area of 56.8 per cent since 2008, greater than the rise in prices across greater London of 50 per cent over this period.

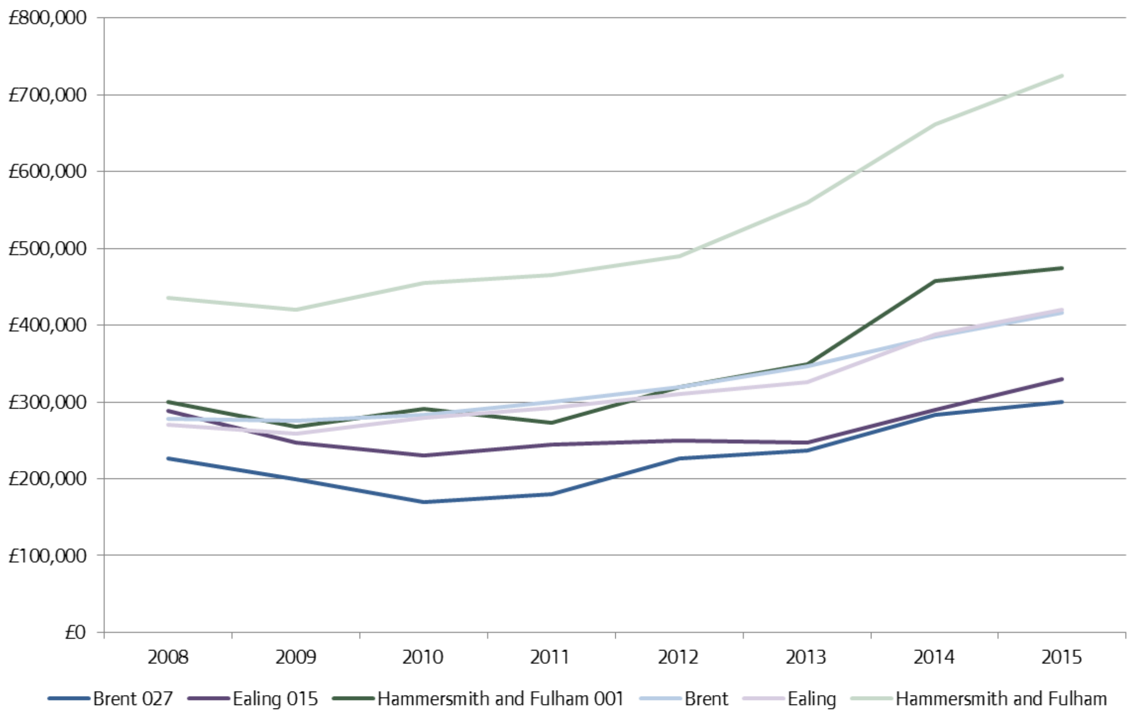
[7] House price data for 2015 is currently provisional, and based on prices for the first three quarters of the year.

Figure 5: Median house price – OPDC Area, Region, and Greater London, 2008 -2015



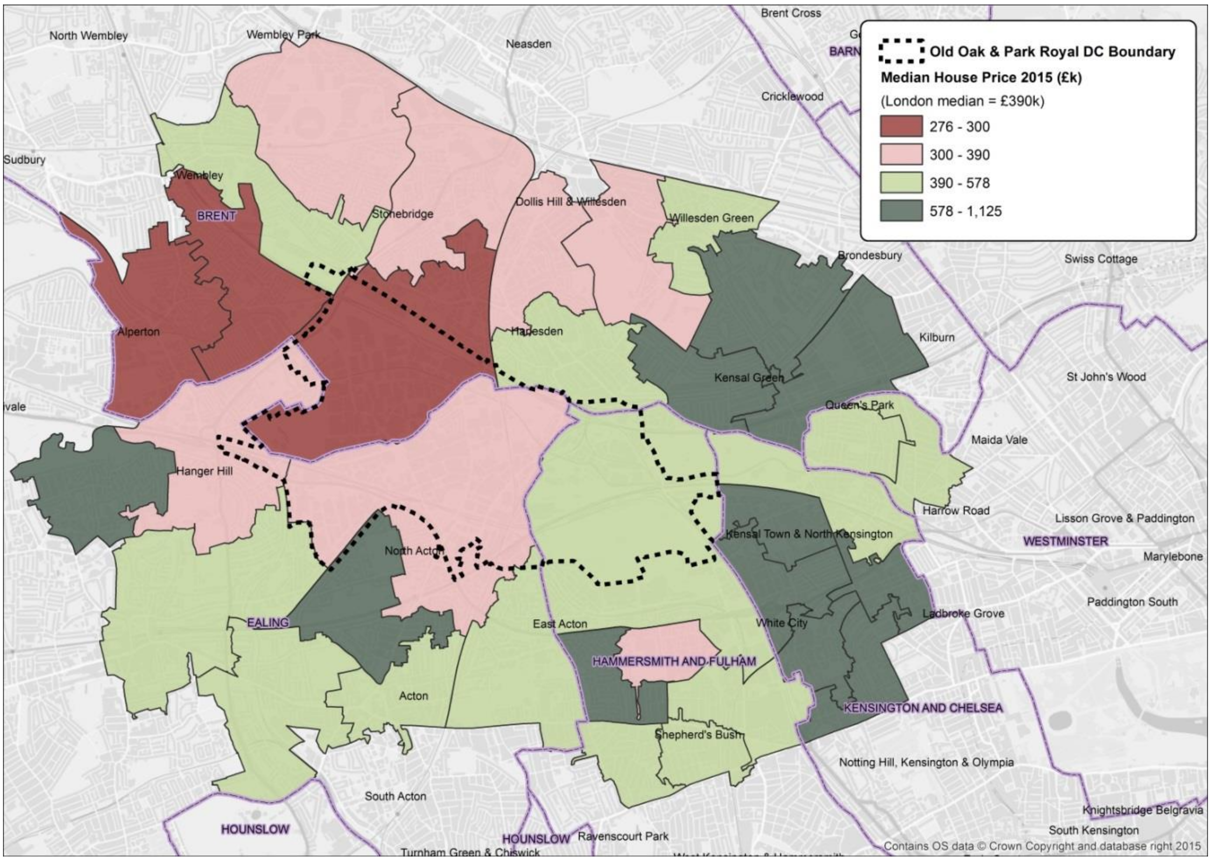
Source: GLA Datastore from Land Registry data

Figure 6: Median house price – OPDC Area, 3 Boroughs, 2008-2015



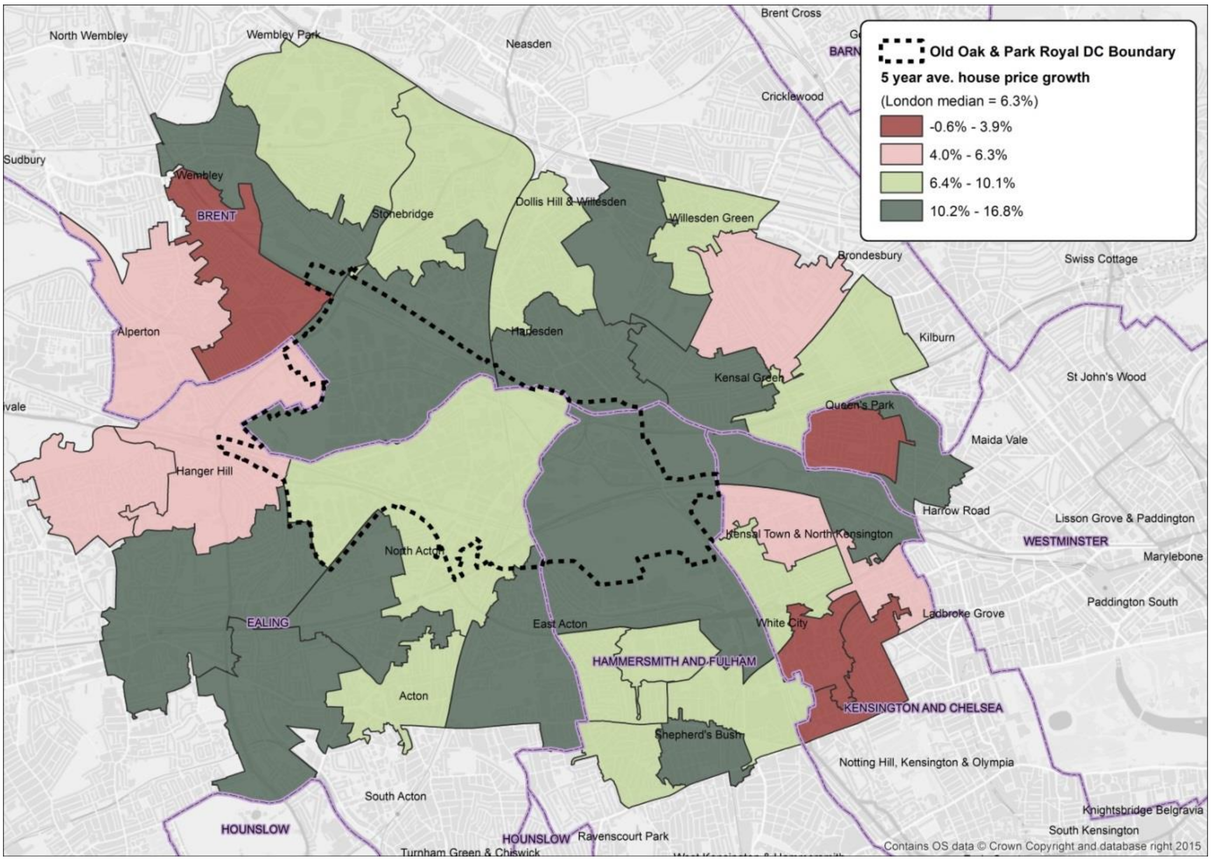
Source: GLA Datastore from Land Registry data

Map 9: Median house price in OPDC region



Source: GLA Datastore from Land Registry data

Map 10: Five year average house price growth in OPDC region, 2011-2015



Source: GLA Datastore from Land Registry data

5.3.7 Broadband

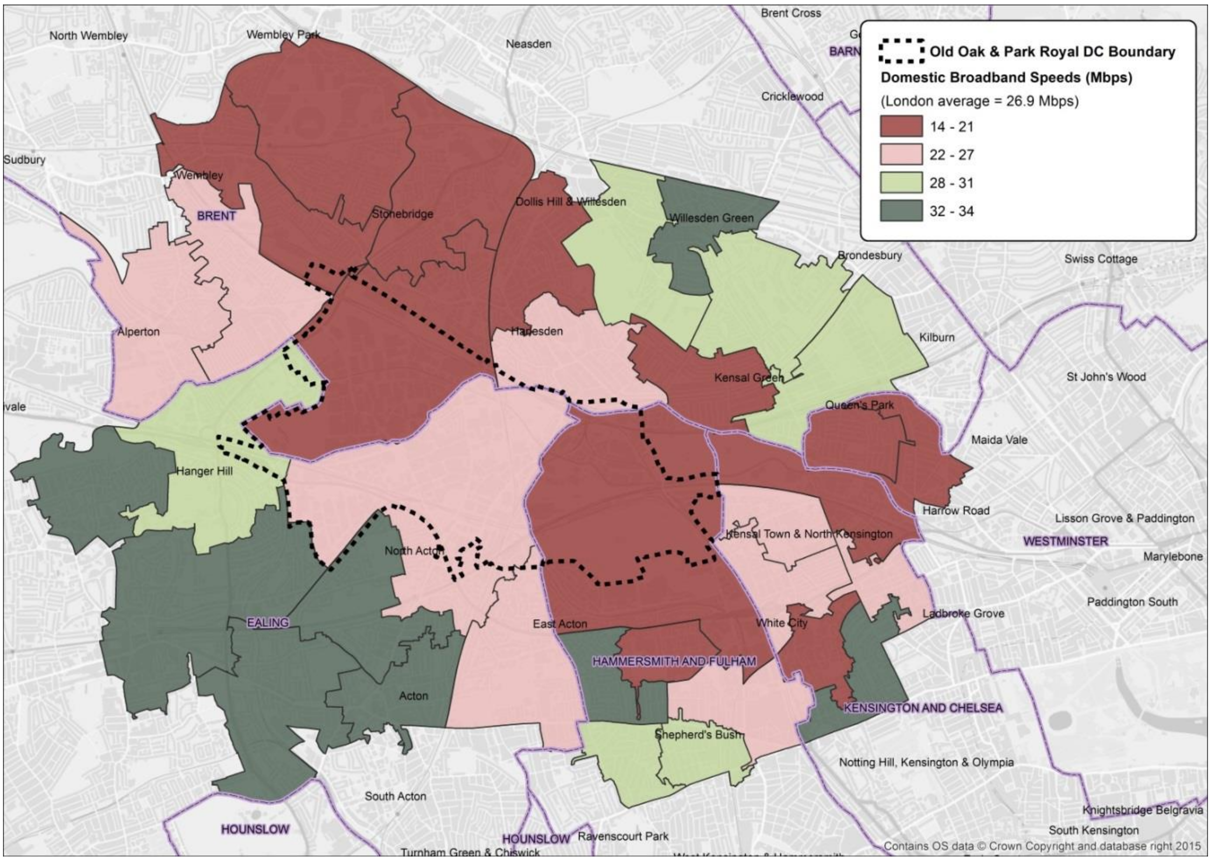
According to Ofcom[8], broadband speeds should be considered in three different tiers:

- Basic broadband is at a speed of at least 2 megabits per second (Mbit/s). This is the aim of the Government's Universal Service Commitment, and speeds below this threshold can pose considerable problems for those affected. It is estimated 3 per cent of UK households do not have access to basic broadband.
- Standard broadband is at a speed of at least 10Mbit/s. There is emerging evidence that a typical household requires a download speed of around 10Mbit/s, with 15 per cent of UK households not having access to this broadband speed.
- Superfast broadband is at a speed of at least 30Mbit/s. Superfast broadband is now available to 75 per cent of households across the UK.

Across the OPDC region average download speeds from broadband for domestic use are on average 24.2Mbit/s, slightly slower than the London average of 26.9Mbit/s. For the OPDC Area, speeds are also slower, averaging 17.3Mbit/s, and reach as low as 13.9Mbit/s in Brent 027. However, all of these speeds are above the 10Mbit/s that is considered to be required to meet the needs of households.

[8] Ofcom Infrastructure Report 2014

Map 11: Ofcom Domestic broadband speeds, 2014



Source: GLA Datastore from Ofcom

The trends are similar for business broadband speeds, with the OPDC Region average speed of 19.7Mbit/s below the London average of 21.8 Mbit/s. Again, within the OPDC Area, business broadband speeds are slower, averaging 10.9Mbit/s, half the average download speed for business broadband across London.

5.4 Income and employment

Household incomes in the OPDC area are noticeably lower than across wider-London despite having experienced similar growth to London since the economic downturn. Whilst the rates of economic activity are lower, and unemployment rates are higher across most different demographic groups that live in the area. Long-term unemployment is also more common, resulting in a higher share of the population claiming benefits through Job Seekers Allowance or Universal Credit.

5.4.1 Household income

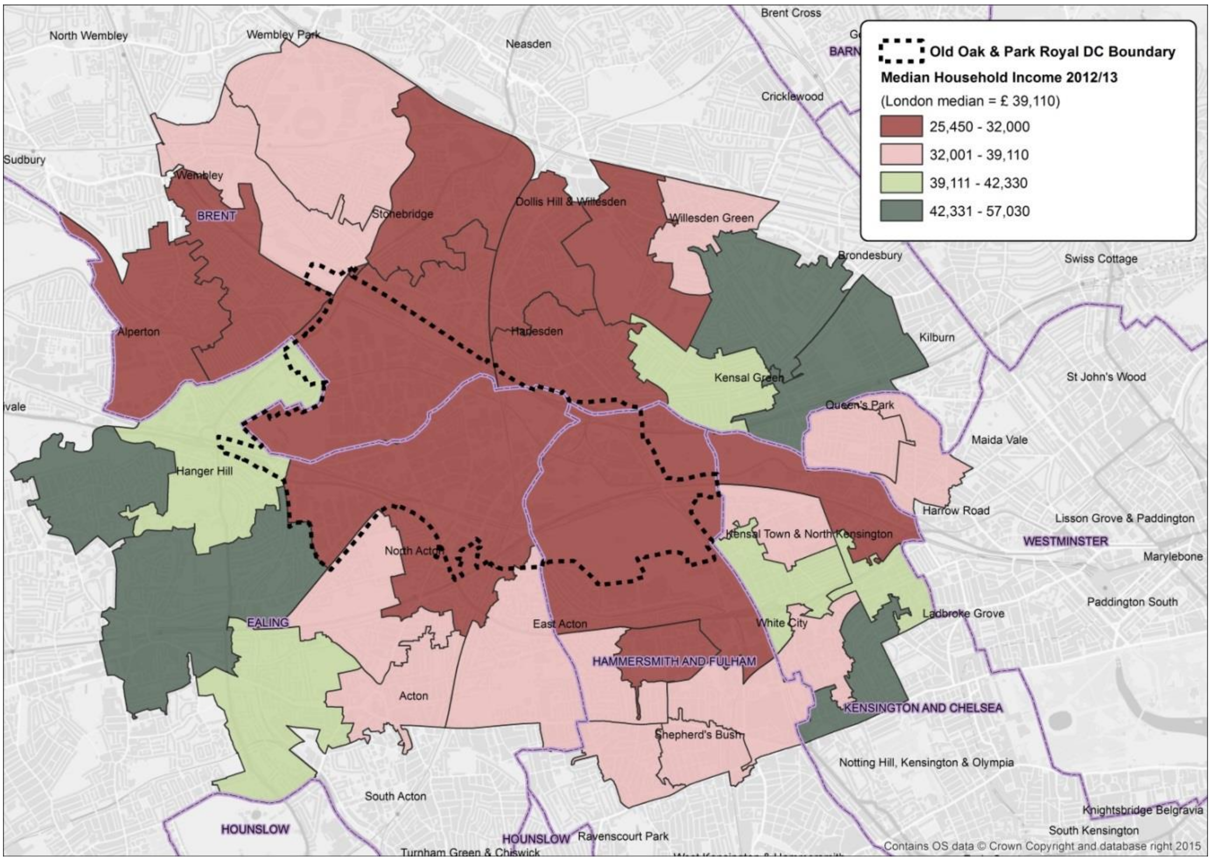
Median household income is materially lower in both the wider OPDC Region and in the MSOAs located within the boundaries of the development area. For the OPDC Region, median household income of £35,791 per annum is 8.5 per cent lower than at a London-wide level. The gap increases further when looking at the OPDC Area, with incomes 23.5 per cent lower at £29,927 compared to £39,100 for Greater London. This gap has been present since 2007-08, with income growth across all three geographies similar at around 3.5 per cent (Table 12). Lower incomes could be explained in part by the younger age profile of OPDC Area residents when compared to Greater London.

Table 12: Median household income 2012/13

	Median Household Income 2012/13	5 year annual average growth (since 2007-08)
OPDC Area	£29,927	3.4%
OPDC Region	£35,791	3.4%
London	£39,110	3.5%

Source: GLA Datastore

Map 12: Median household income 2012/13



Source: GLA Datastore

5.4.2 Economic activity and employment

In the OPDC Area residents are less likely to be economically active (67.8 per cent) than in the wider region (70.6 per cent) or Greater London (71.7 per cent). Unemployment was also more common in the OPDC Area (10.4 per cent) and Region (8.6 per cent) compared to Greater London (7.3 per cent). Of those residents that were in employment, those in the OPDC Area were more likely to be employed full or part time, and less likely to be self-employed than in the wider region or across Greater London.

For the group that were not economically active, residents of the OPDC Area were more likely to be students, disabled or suffering from long-term illness, or for other reasons compared to the wider region and Greater London. Only 20.9 per cent of inactive residents were retired in the OPDC Area, compared to 25 per cent in the wider region, and 29.5 per cent across Greater London (Table 13).

Table 13: Economic activity, 2011 Census

	OPDC Area	OPDC Region	London
All usual residents aged 16 to 74			
Economically active	67.8%	70.6%	71.7%
Economically Inactive	32.2%	29.4%	28.3%
Economically active residents			
In employment	82.5%	85.7%	87.1%
Unemployed	10.4%	8.6%	7.3%
Full-time student	7.1%	5.7%	5.7%
Residents in employment			
Employee: Full-time	64.3%	63.2%	63.9%
Employee: Part-time	18.7%	16.5%	17.5%
Self-employed	17.0%	20.3%	18.7%
Residents economically inactive			
Retired	20.9%	25.0%	29.5%
Student (including full-time students)	29.3%	26.9%	27.6%
Looking after home or family	18.5%	18.7%	18.5%
Long-term sick or disabled	16.1%	16.1%	13.1%
Other	15.3%	13.3%	11.3%

Source: 2011 Census

5.4.3 Economic activity by age

In the OPDC Area rates of economic activity are lower across all age groups when compared to wider London. The largest difference between the rates of economic activity between the ODPC Area and Greater London are in the older age cohorts, with the rate of economic activity 7.7 per cent lower in the 45-54 year old age cohort, with the gap also above 6 per cent in the 35-44 and 55-64 year old cohorts. For 16-24 year olds economic activity is also lower than the London average, but is closer to the London average than these older age groups at 54.3 per cent (Table 14).

Table 14: Economic activity by age, 2011 Census

Age	16-24	25-34	35-44	45-54	55-64	65+
OPDC Area	54.3%	81.5%	76.3%	73.9%	57.0%	11.2%
OPDC Region	55.0%	84.7%	79.9%	77.3%	61.1%	14.4%
London	56.2%	84.9%	82.7%	81.6%	63.5%	13.3%

Source: 2011 Census

When looking at unemployment, similar to rates of economic activity, the rate of unemployment is higher in the OPDC Area when compared to the Greater London rate of unemployment across different age groups. The unemployment rate is highest amongst 16-24 year olds at 25.7 per cent, compared to the London rate of 21.7 per cent. However, the largest gap is in the 35-44 and 45-54 year old cohorts, in which the unemployment rate was 4.9 per cent and 4.7 per cent higher respectively (Table 15).

Table 15: Unemployment rate by age, 2011 Census

Age	16-24	25-34	35-44	45-54	55-64	65+
OPDC Area	25.7%	8.8%	12.0%	11.7%	7.3%	4.1%
OPDC Region	23.4%	7.9%	8.9%	9.4%	7.3%	3.2%
London	21.7%	7.2%	7.2%	7.0%	5.7%	2.8%

Source: 2011 Census

5.4.4 Economic activity by ethnicity

The trends of economic activity are broadly similar when looking at different ethnic groups, however there are some noticeable differences. In terms of the share of the working population that were economically active at the time of the 2011 Census, the rate of activity is very similar in the OPDC area and region for white, mixed or multiple, and Asian ethnic groups, however the rate of economic activity was lower than the London rate in the OPDC area and region for the Black/African/Caribbean and other ethnic groups (Table 16).

Table 16: Economic activity by ethnicity, 2011 Census

Economically active	White	Mixed or multiple	Asian	Black/African/ Caribbean	Other
OPDC Area	69.0%	69.7%	68.2%	58.8%	49.3%
OPDC Region	71.5%	68.1%	65.5%	61.0%	53.6%
London	68.4%	68.1%	64.4%	67.9%	59.4%

Source: 2011 Census

The highest rate of unemployment in the Black/African/Caribbean ethnic group, is consistent with the unemployment rate across London. However unemployment in this group is higher in the OPDC region and the wider area, than it is for this ethnic group across London. This is the case across all different ethnic groups except for the Asian group, where unemployment is 0.9 percentage points lower in the area and the region compared to London (Table 17).

Table 17: Economically active unemployed by ethnicity, 2011 Census

Economically active: Unemployed	White	Mixed or multiple	Asian	Black/African/ Caribbean	Other
OPDC Area	7.8%	14.4%	9.2%	22.2%	17.2%
OPDC Region	6.5%	14.2%	9.2%	20.7%	16.0%
London	6.2%	14.0%	10.1%	17.7%	13.2%

Source: 2011 Census

5.4.5 Economic activity by disability and long-term sickness

At the time of the 2011 Census economic activity amongst residents with a long-term illness or disability was slightly lower in the OPDC Area at 24.9 per cent amongst this group, compared to 26.1 per cent across Greater London. In the wider region economic activity amongst this group was slightly higher than at the wider London level.

Of those that were economically active from this group, 20.6 per cent were unemployed at the time of the 2011 Census, higher than the unemployment rate in the OPDC Region of 17.5 per cent, and the rate across Greater London of 14.5 per cent.

Table 18: Economic activity of residents with a disability or long-term illness, 2011 Census

	Economically active	Economically inactive	Economically active: In employment	Economically active: Unemployed
OPDC Area	24.9%	75.1%	79.4%	20.6%
OPDC Region	26.5%	73.5%	82.5%	17.5%
London	26.1%	73.9%	85.5%	14.5%

Source: 2011 Census

5.4.6 Unemployment at Borough level

Timely data on the labour market is not available at a detailed enough level to produce robust estimates of labour market activity for either the OPDC Area or the wider region. However, the ONS models unemployment indicators at local authority level based on the Labour Force Survey and the claimant count, so this indicator is useful to understand the more recent trends in the labour market at Borough level[9].

For the year to June 2015 the unemployment rate in Ealing of 6.9 per cent was above the London unemployment rate of 6.6 per cent, whilst the unemployment rate in both Brent and Hammersmith and Fulham was lower than the London-wide rate (Table 19). Across the three Boroughs there were a total of 30,200 unemployed residents in the year to June 2015.

Table 19: Unemployment statistics, year to June 2015

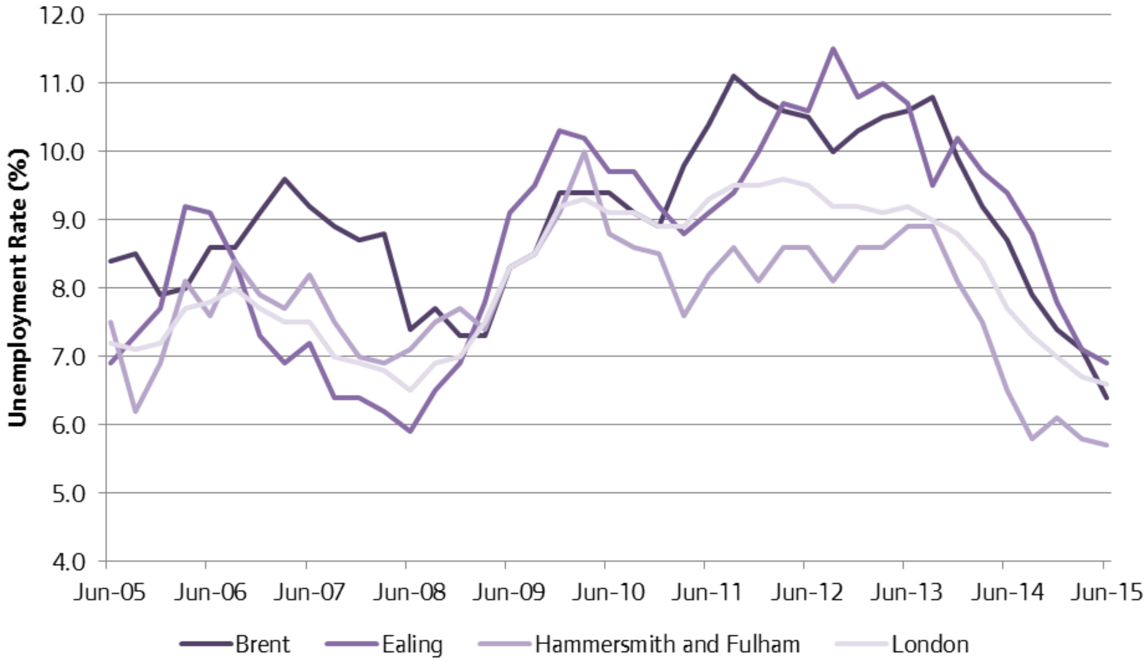
	Unemployment Rate	Unemployment Level
Brent	6.4	10,900
Ealing	6.9	13,000
Hammersmith and Fulham	5.7	6,300
London	6.6	303,800

Source: Model based unemployment estimates, GLA Datastore from ONS

Looking at the changes in the unemployment rate of these boroughs over time, the unemployment rate has declined across all three boroughs over the past two years. The declines in these boroughs have also been at a faster pace than the London-wide unemployment rate. Between the years to June 2013 and June 2015, the unemployment rate fell by 4.2 percentage points in Brent, 3.6 percentage points in Ealing, and 3.2 percentage points in Hammersmith and Fulham, compared to a fall of 2.6 percentage points in the London-wide unemployment rate (Figure 7).

[9] The modelled estimates produced by the ONS are certified as national statistics, and are considered to be more accurate than the results that come directly from the Labour Force Survey.

Figure 7: Unemployment rate, rolling 12 month average



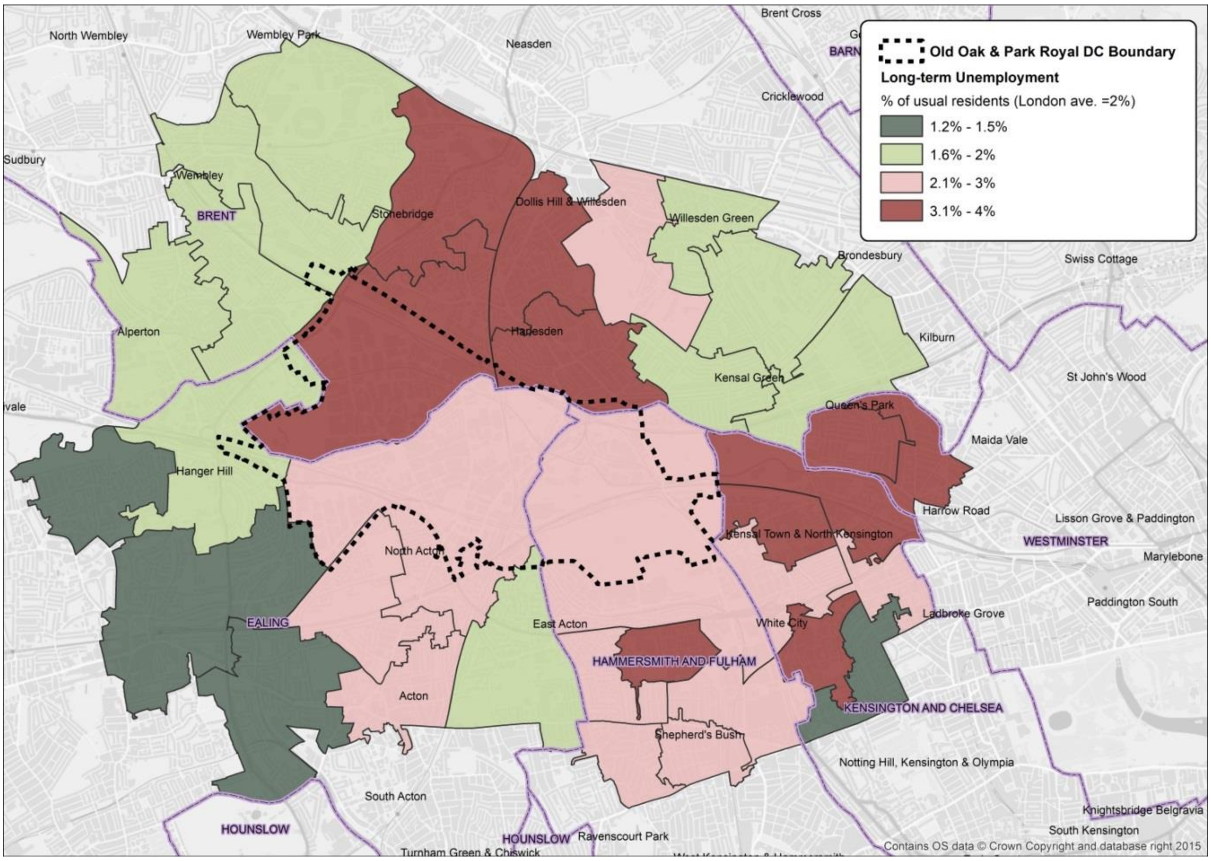
Source: Model based unemployment estimates, GLA Datastore from the ONS

5.4.7 Long-term unemployment

Within the OPDC Area at the time of the 2011 Census there were 550 people who were long-term unemployed, 2.8 per cent of the usual resident population. Of this group there were 313 males (3.2 per cent) and 237 females (2.4 per cent) that were long-term unemployed. In the wider region 2.4 per cent of usual residents in the area aged from 16 to 74 were long-term unemployed[10], a total of 5,700 people. Long-term unemployment was more common for males at 2.7 per cent than for females at 2.1 per cent. These rates of long-term unemployment were both higher than the London rate of 2.0 per cent of usual residents.

[10] A person is defined as Long-term unemployed at Census (27 March 2011), if they were unemployed and the year they last worked was 2009 or earlier.

Map 13: Long-term unemployment, 2011 Census



Source: 2011 Census

5.4.8 Claimant count

Data on the number of claimants counts the number of people claiming Jobseeker's Allowance (JSA) plus those who claim Universal Credit who are out of work and that are aged 16 years and older[11]. This series includes some recipients of Universal Credit that are out of work but are not required to look for work, as it is not currently possible to identify these recipients of Universal Credit.

Within the OPDC Area, there was an average of 787 claimants fitting this category over the 2014/15 financial year, with an average of 7,448 claimants in the wider OPDC Region. Based on the population estimates for these areas in 2014, this is equivalent to 3.6 per cent of the population aged 16 years or older for the OPDC Area, and 2.9 per cent of the population in the wider region. These claimant rates are higher than the London-wide rate of 2.0 per cent of the population aged 16 and older over the same period.

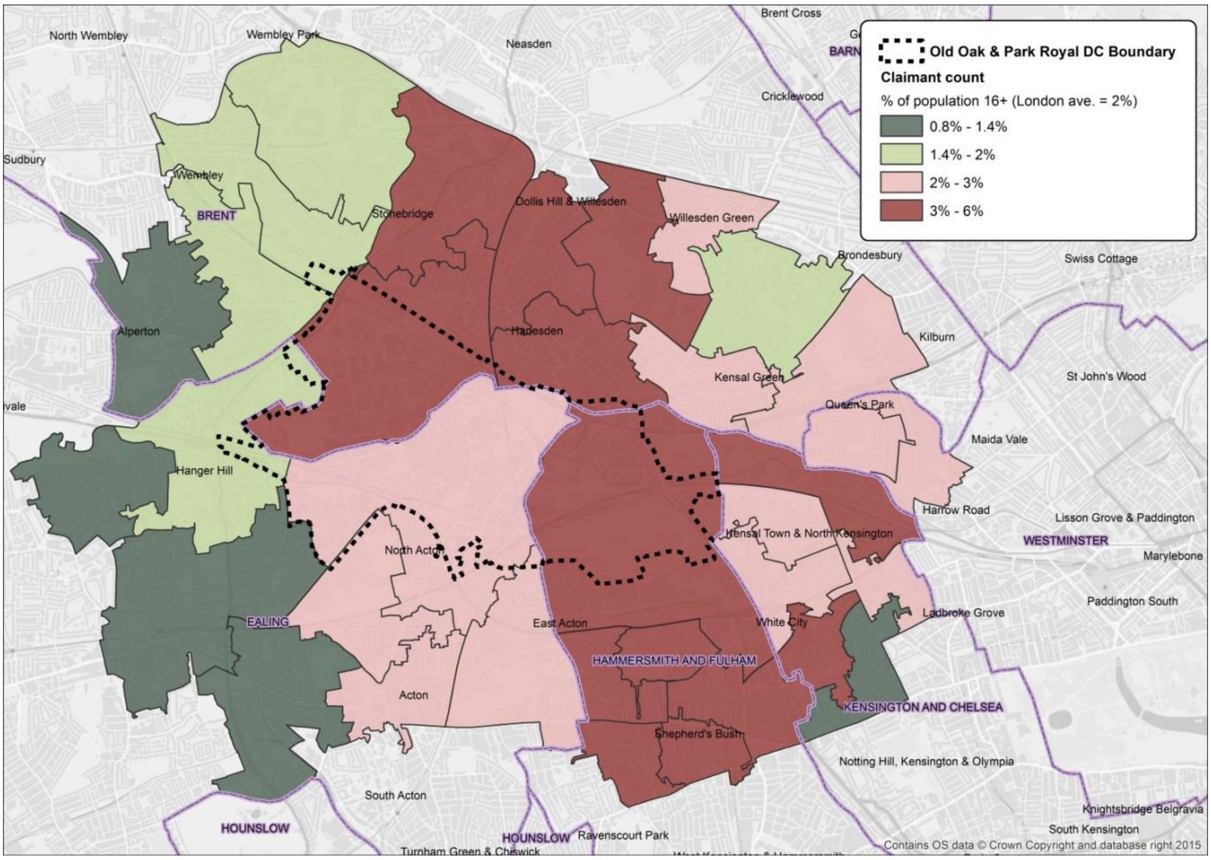
[11] This series is currently designated as experimental by the ONS. Experimental statistics are releases from the ONS that are still in development and have not been certified as national statistics. There have been recent changes to the claimant count to include recipients of Universal Credit, which are still being developed by the Department for Work and Pensions. Therefore these statistics are currently designated as experimental statistics even though they are now the headline measure used by the ONS to measure the number of claimants.

Table 20: Average claimant count, 2014/15

	Average number of claimants	16+ population 2014	Share of Population
OPDC Area	787	21,625	3.6%
OPDC Region	7,449	254,192	2.9%
London	136,775	6,806,412	2.0%

Source: Claimant count, ONS

Map 14: Claimant count as share of 2014 population, 2014/15



Source: Claimant count, ONS

In terms of age, claimants in the OPDC Region are less likely to be younger than at the wider London level, with 15.8 per cent of claimants between the ages of 16 to 24 during 2014-15, similar to the share of this age-group in the OPDC Area of 16.2 per cent, both lower than the 18.9 per cent share for this age group across London. As a result, the share of claimants for older age groups is higher by around 1.5 percentage points for both the 25-49 and 50+ age groups for both the OPDC Area and wider region compared to London (see Table 21).

Table 21: Average claimant count by age, 2014/15[12]

Age	OPDC Area	OPDC Region	London
Aged 16-24	16.2%	15.8%	18.9%
Aged 25-49	61.5%	61.3%	59.9%
Aged 50+	22.4%	22.8%	21.1%

Source: Claimant count, ONS

Across the OPDC Region, claimants are slightly more likely to be male compared to the London level, but the rates of male claimants within the OPDC Area are in-line with the wider London share of claimants that are male (Table 22).

Table 22: Claimant count by gender, 2014/15[8]

Gender	OPDC Area	OPDC Region	London
Male	58.8%	61.6%	58.7%
Female	40.9%	38.4%	41.3%

Source: Claimant count, ONS

For those that are claiming JSA in the OPDC Area, they are more likely to have been claiming JSA for a longer period of time than at the London level as of November 2015. Whilst around half of claimants in the OPDC Area have been claiming JSA for at least six months, this falls to around 40 per cent at London level. Similarly, around a third of claimants have been on JSA for at least a year, compared to around one-quarter for claimants across London.

Table 23: JSA claimant duration, November 2015

Duration	OPDC Area	OPDC Region	London
At least 6 months	52.5%	47.9%	41.2%
At least 12 months	33.2%	30.3%	25.5%

Source: Claimant count, ONS

5.4.9 Occupation

Data collected from the 2011 Census suggests that professional occupations are the most common for those that live in both the OPDC Area and the wider region, accounting for 19.7 per cent and 20.8 per cent of all occupations respectively. However the share of professional occupations for these areas is lower than the London share of 22.5 per cent. Elementary occupations are the second most common in the OPDC Area, making up 13.5 per cent of occupations. This is noticeably higher than in the wider area where they account for 11.8 per cent of occupations, and just 9.6 per cent across London where they are the fifth most common type of occupation.

Of the other occupations, skilled trades, caring, leisure and other services, sales and customer services, and process plant and machine operatives are all more common in the OPDC area than in Greater London, whilst managers, directors and senior officials, professional and associate professional and technical occupations are less common in the area than across wider London. The full breakdown of occupations is shown in Table 24.

[12] Percentages may not total 100 per cent due to rounding of estimates.

Table 24: Occupation by type, 2011 Census

	OPDC Area	OPDC Region	London
Managers, directors and senior officials	7.5%	10.9%	11.6%
Professional occupations	19.7%	20.8%	22.5%
Associate professional and technical occupations	13.1%	16.8%	16.3%
Administrative and secretarial occupations	11.0%	9.9%	11.7%
Skilled trades occupations	10.4%	8.7%	8.3%
Caring, leisure and other service occupations	9.2%	8.0%	7.9%
Sales and customer service occupations	9.5%	7.7%	7.5%
Process plant and machine operatives	6.1%	5.3%	4.7%
Elementary occupations	13.5%	11.8%	9.6%

Source: 2011 Census

5.5 Community

Levels of education tend to be below London averages in terms of both results for students still in school, and the level of qualifications that have been obtained for the working-age population. The health of the community in the OPDC area is also below London average levels, with the rates of disability or long-term health problems and childhood obesity higher than London averages, alongside lower life expectancy in the Area. This is consistent with the average rate of deprivation across the OPDC Area placing it in the top 20 per cent of areas in London in terms of deprivation. Crime is also more common in the OPDC Area on a per-capita basis, however this is likely to be skewed somewhat by the low population density of the area.

5.5.1 Education

Educational attainment tends to be slightly lower in both the OPDC Area and the wider region when compared to London. Educational results are available at different key stages of a pupil's education. This report looks at student results from key stage two and key stage four. Key stage two covers pupils in years three to six, while key stage four covers pupils in years 10 and 11 when they usually undertake General Certificate of Secondary Education (GCSE) exams.

The proportion of pupils in the OPDC Area and wider region that were achieving the expected levels was below the London average across reading, writing and mathematics. The share of students that achieved the expected levels across all three disciplines was 80.9 per cent in the OPDC region, slightly lower at 78.8 per cent in the OPDC Area. Across Greater London, 81.9 per cent of students were achieving the expected level across all three disciplines.

Table 25: Educational attainment results key stage two, 2013/14

	Achieving expected level Reading	Achieving expected level writing	Achieving expected level maths	Achieving expected level All
OPDC Area	88.1%	86.4%	88.1%	78.8%
OPDC Region	89.6%	86.2%	88.4%	80.9%
London	90.4%	87.8%	88.6%	81.9%

Source: Neighbourhood statistics in England, Department for Education

Similar results are found for older students completing their GCSEs. The proportion of pupils achieving 5 or more grades between A* and C was 67.9 per cent across the OPDC Area, slightly lower at 67.7 per cent for the OPDC Region, both below the London-wide average by around 3 percentage points. There is a similar trend when looking at the proportion of pupils that achieve those grades across 5 subjects including English and Mathematics, or considering the English and Mathematics grades on their own.

Table 26: Educational attainment results key stage 4, 2013/14

	Total number of pupils achieving 5 or more A*-C grades at GCSE or equivalent	Total number of pupils achieving 5 or more A*-C grades at GCSE or equivalent including english and mathematics GCSEs	Total number of pupils achieving A*-C grades in english and mathematics GCSEs
OPDC Area	67.9%	59.7%	61.4%
OPDC Region	67.7%	59.5%	61.1%
London	70.8%	61.8%	64.0%

Source: Neighbourhood statistics in England, Department for Education

5.5.2 Qualifications

Information on the qualification levels of residents is also available from the 2011 Census. The Census has a breakdown of qualifications into the following categories:

- No qualifications: no academic or professional qualifications;
- Level 1: 1-4 GCSEs or equivalent;
- Level 2: 5+ GCSEs or equivalent;
- Apprenticeship: apprenticeship;
- Level 3: 2+ A-levels or equivalent;
- Level 4: degree level or above; and
- Other qualifications: includes vocational and work related qualifications, foreign qualifications where the level of the qualification or not known.

For residents of the OPDC Area, the main difference in qualification levels when compared to London was a lower share of residents that had a degree level qualification or above, with 31.1 per cent of residents having a Level 4 or higher qualification, compared to 37.7 per cent at London level. This was offset primarily by a higher proportion of residents that had no qualification (21.0 per cent) compared to Greater London (17.6 per cent) or that had a different qualification (14.4 per cent to 10.0 per cent).

Table 27: Qualification of working-age resident population, 2011 Census

	No qualification	Level 1	Level 2	Apprenticeship	Level 3	Level 4 and above	Other
OPDC Area	21.0%	11.1%	11.1%	1.6%	9.7%	31.1%	14.4%
OPDC Region	17.7%	9.4%	10.2%	1.2%	9.7%	37.5%	14.3%
London	17.6%	10.7%	11.8%	1.6%	10.5%	37.7%	10.0%

Source: 2011 Census

5.5.3 Disability and long-term health problems

The occurrence of long-term health problems or disabilities in the residents as recorded in 2011 was slightly higher than at the London level overall. Whilst the proportion of residents that have their day-to-day activities limited a little is broadly in-line with that of Greater London, those that are limited a lot is slightly higher, at 7.4 per cent of residents in the OPDC region, 7.8 per cent in the OPDC Area, compared to 6.7 per cent of residents across London (Table 28).

Table 28: Share of residents with a long-term health problem or disability, 2011 Census

	Day-to-day activities limited a lot	Day-to-day activities limited a little	Day-to-day activities not limited
OPDC Area	7.8%	7.2%	84.9%
OPDC Region	7.4%	7.5%	85.1%
London	6.7%	7.4%	85.8%

Source: 2011 Census

In the OPDC Area there were a total of 3,938 usual residents that had their day-to-day activities limited by a disability or long-term illness, with more than half of these people (2,051) that had their day-to-day activities limited a lot. In the wider OPDC Region, there were 46,408 residents that had their day-to-day activities limited, just under half of this group had their day-to-day activities limited a lot (Table 29).

Table 29: Number of residents with a long-term health problem or disability, 2011 Census

	Day-to-day activities limited a lot	Day-to-day activities limited a little	Day-to-day activities not limited
OPDC Area	2,051	1,887	22,191
OPDC Region	23,119	23,289	265,533
London	551,664	605,501	7,016,776

Source: 2011 Census

5.5.4 Life expectancy

Based on Ward level data, life expectancy in the OPDC Area between 2009 and 2013 is generally lower than the London average at 80.3 years overall, compared to 81.8 years across London. For males life expectancy is 76.6 years which is lower than the London average, and for females is 83.8 years in-line with life expectancy for females across the capital.

In the OPDC region life expectancy is 81.6 years, slightly below the overall London life expectancy. For males, life expectancy is lower in the region at 78.8 years compared to 79.7 years for London, however for females life expectancy in the region is higher than for London overall, with a life expectancy of 84.7 years compared to 83.8 years at a city-wide level (Table 30).

Table 30: Life expectancy, 2009-13

	OPDC Area	OPDC Region	London
Persons	80.3	81.6	81.8
Males	76.6	78.8	79.7
Females	83.8	84.7	83.8

Source: Life expectancy by ward, GLA Datastore from ONS

5.5.5 Childhood obesity

The latest data available on childhood obesity from 2011/12 to 2013/14 shows that in the OPDC Area it is slightly higher or equal to London averages across a number of measures. Across the OPDC Area for children of reception age[13], the rate of obesity was 14 per cent, slightly higher than the London average of 11 per cent. Across the OPDC Region obesity rates were in-line with the London average at 11 per cent at reception age. For year 6 students the rate of obesity in both the OPDC Area and the wider region was 24 per cent, higher than the London average rate of 22 per cent.

Using excess weight as a measure, 28 per cent of children at reception age carried excess weight in the OPDC Area, and 24 per cent in the OPDC Region. These rates were higher than the London average of 23 per cent. At year 6 age the rate was 39 per cent in the OPDC Area, and 38 per cent in the wider region, compared to the London average of 37 per cent (Table 31).

Table 31: Rate of childhood obesity, 2011/12 – 2013/14

	Reception age		Year 6 age	
	Excess Weight	Obese	Excess Weight	Obese
OPDC Area	28%	14%	39%	24%
OPDC Region	24%	11%	38%	24%
London	23%	11%	37%	22%

Source: Prevalence of Childhood Obesity, GLA Datastore from Information Centre for Health and Social Care

5.5.6 Deprivation

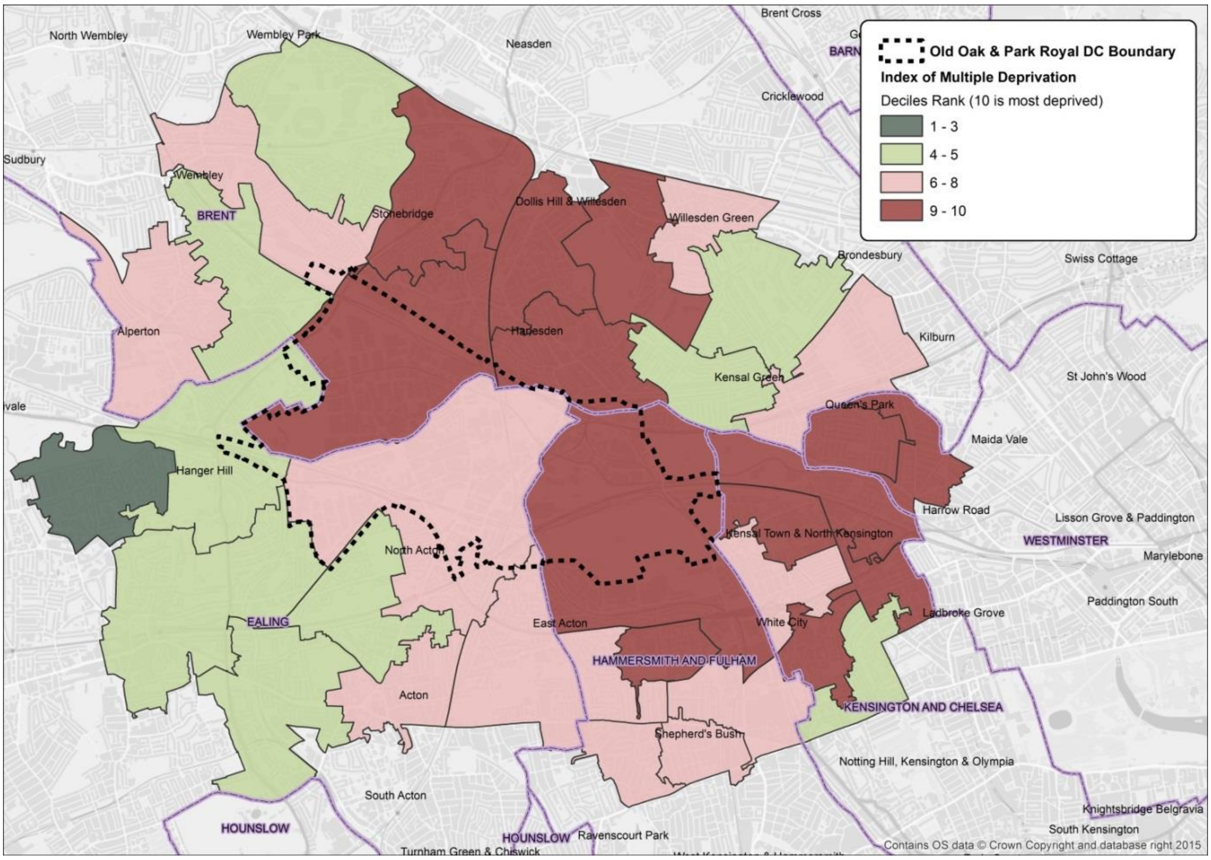
Deprivation is measured across seven different areas or domains - income, employment, health, education, living environment, crime and barriers to services using a wide range of indicators. These measures are aggregated to create the index of multiple deprivation (IMD), which gives an indication of overall deprivation. The higher the IMD score, the greater the level of deprivation. However, IMD scores are somewhat intangible, and the ranking based on the IMD score is easier to understand. Therefore this analysis will focus on the decile in which particular geographies are ranked, relative to all areas across London[14].

In the OPDC Region in 2015 the IMD places it in the top 30 per cent of areas across London in terms of Deprivation. Deprivation is again higher across the OPDC Area placing it in the top 20 per cent of deprived areas compared to the rest of London. These measures hide different levels of deprivation in smaller areas. Within the OPDC Area, Brent 027 had the highest level of

[13] Reception age is the age at when children first commence school, sometimes 4 years of age but usually 5.
[14] This comparison is comparing areas of different sizes, as the London rankings are based upon Lower Super Output Areas. These are smaller than the MSOAs that have been used to analyse this area

deprivation sitting in the top 10 per cent of areas across London, Hammersmith and Fulham 001 was in the top 20 per cent, and Ealing 015 was in the top 30 per cent.

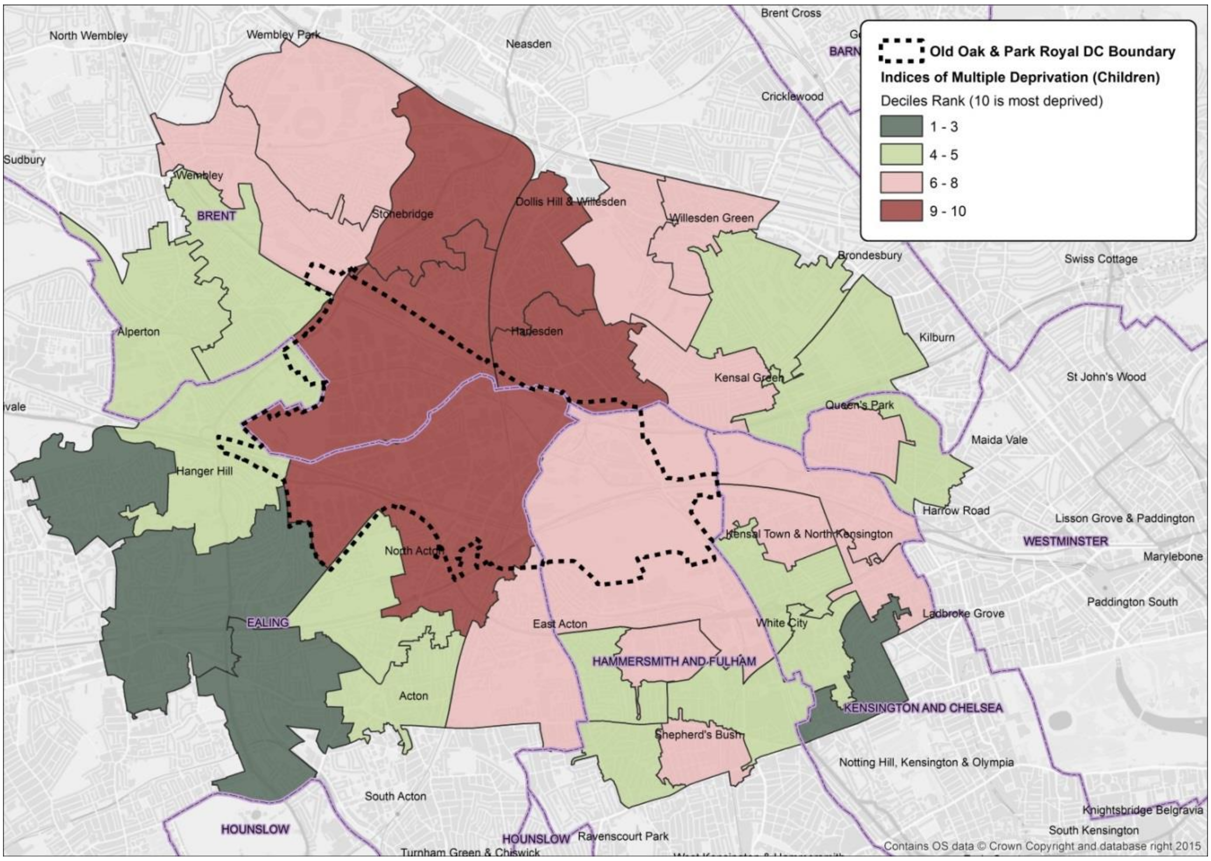
Map 15: Index of multiple deprivation, 2015



Source: Indices of Multiple Deprivation, GLA Datastore from DCLG

There are a number of supplementary indices of deprivation that are also available, one of which is for deprivation of children and young people. In the OPDC Region in 2015 the IMD for children and young people which places it in sixth decile of areas across London in terms of Deprivation. Deprivation is higher across the OPDC Area placing it in the ninth decile or the top 20 per cent of deprived areas compared to the rest of London.

Map 16: Deprivation of children and young people



Source: Indices of Multiple Deprivation, GLA Datastore from DCLG

5.5.7 Crime

Criminal activity is difficult to measure, as not all crimes are reported and some crimes that are reported are not assigned to a particular location. For example, in 2014/15 there were 694,185 crimes reported in London[15], with around 1.5 per cent of these crimes were not associated with a particular location at MSOA level.

In 2014/15 there were 32,266 crimes reported in the OPDC region, with 3,295 of these reported within the OPDC Area. For the purpose of comparability, this is equivalent to 101 crimes per 1,000 people living in the wider region, with the rate increasing to 120 crimes per 1,000 people reported in the OPDC Area, higher rates of crime than the 80 crimes per 1,000 people across London.

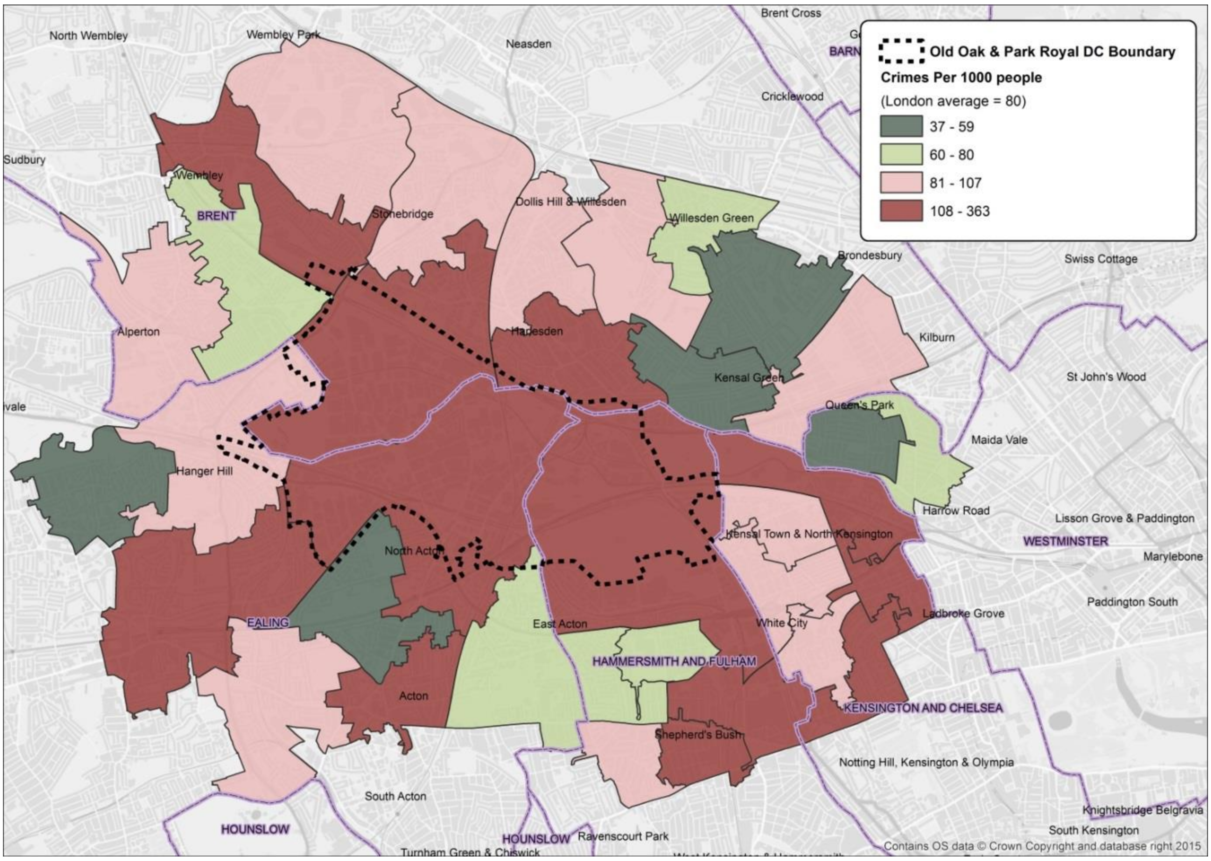
Table 32: Crime statistics, 2014/15

	Total number of Crimes	Crimes per 1000 people
OPDC Area	3,295	120
OPDC Region	32,266	101
London[16]	683,792	80

Source: Metropolitan Police

[15] Crimes categorised as sexual, or fraudulent/forgery are not available at MSOA level and have been excluded from this analysis
[16] For comparability purposes, only crimes that were recorded at MSOA level have been included for the London total.

Map 17: Number of crimes per 1,000 people, 2014/15



Source: Metropolitan Police

In terms of the types of crimes, theft and the handling of stolen goods was the most common, comprising around 40 per cent of crimes reported, with violent crimes the second most common reported crimes at around 30 per cent of reported crimes. Violence and drug related offences were slightly more common in the area when compared to London, with burglary and robbery slightly less common (Table 33).

Table 33: Share of reported crimes, 2014/15

	Burglary	Criminal Damage	Drugs	Robbery	Theft & Handling Stolen Goods	Violence Against The Person	Other Notifiable Offences
OPDC Area	8.4%	8.4%	8.2%	2.5%	39.4%	30.7%	2.4%
OPDC Region	8.8%	7.7%	7.9%	2.7%	40.5%	30.4%	1.9%
London	10.6%	8.8%	6.2%	3.2%	40.7%	28.5%	2.0%

Source: Metropolitan Police

5.6 Transport

There is greater access to transport in the OPDC Area when compared to the average across London, which is likely due to the number of tube stations that surround the OPDC Development Zone. In terms of commuting patterns, people tend to commute into the area on the tube or overground more than they commute out of the area. Usual residents are less likely to have access to a vehicle, whilst on a per capita basis road accidents are more common than at the wider London level, but this is at least in part due to the low population density and commercial nature of the area.

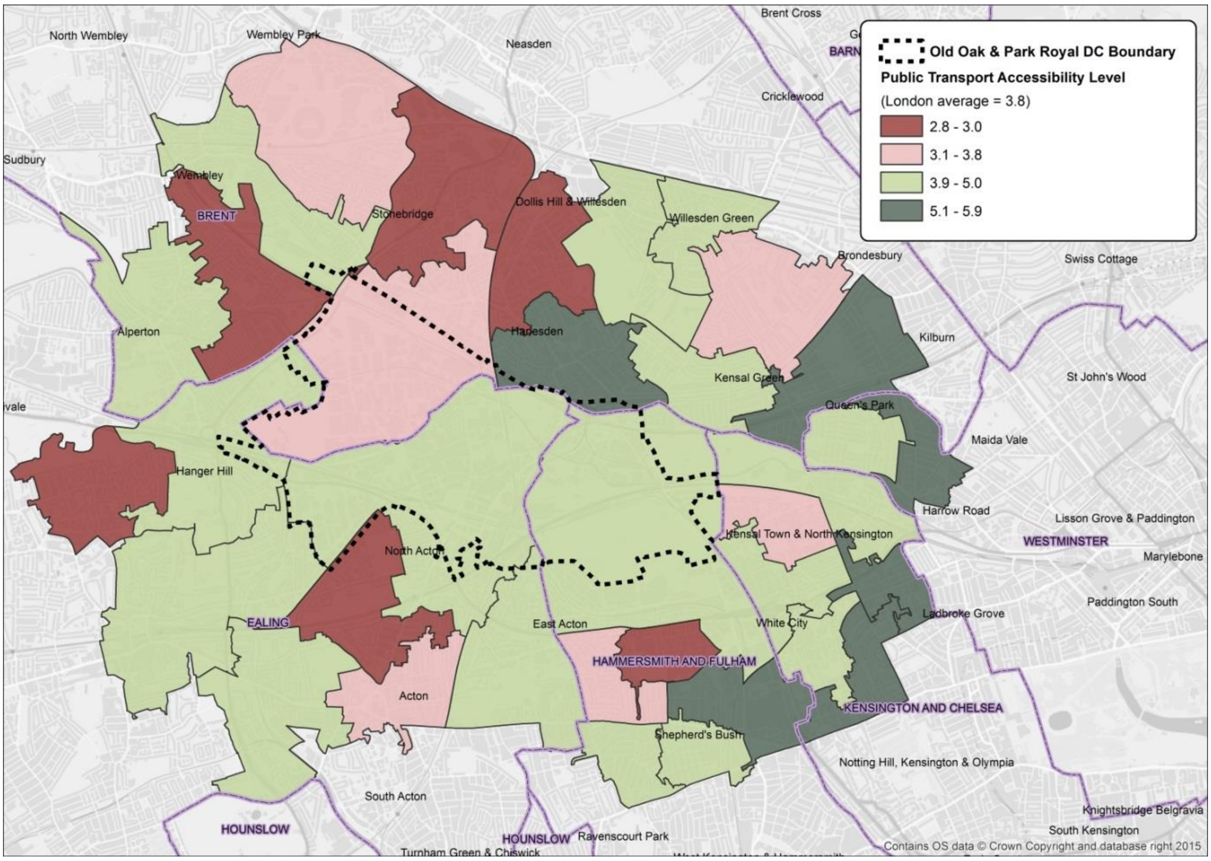
5.6.1 Access to public transport

Access to public transport can be measured by the public transport accessibility level (PTAL). PTAL is measured on a scores basis from 0 to 6 with 0 reflecting very poor access to public transport, and 6 reflecting excellent access to public transport[17]. The PTAL score reflects walking time from the location to the public transport access points, the reliability of the service modes available, the number of services available within the catchment, and the level of service at the public transport access points - i.e. average waiting time. Things PTAL does not measure include the speed or utility of accessible services, crowding, including the ability to board services, or ease of interchange.

In 2014, the average PTAL score[18] for both the OPDC Area and Region is a score of 4.2, which is higher than the London average score of 3.8. Scores within the OPDC Region varied from a low of 2.8 to a high of 5.9. For the OPDC Area, Brent 027 had a score of 3.6, Ealing 015 had a score of 4.0, and Hammersmith and Fulham scored 4.9 on average (Map 17).

[17] There are sub-categories for scores of 1 (1a and 1b) and 6 (6a and 6b) with 6b being the highest PTAL score possible.
[18] Average PTAL scores are scored on a scale of 1 to 8, to account for the sub-categories for scores of 1 and 6.

Map 18: PTAL of OPDC Region, 2014

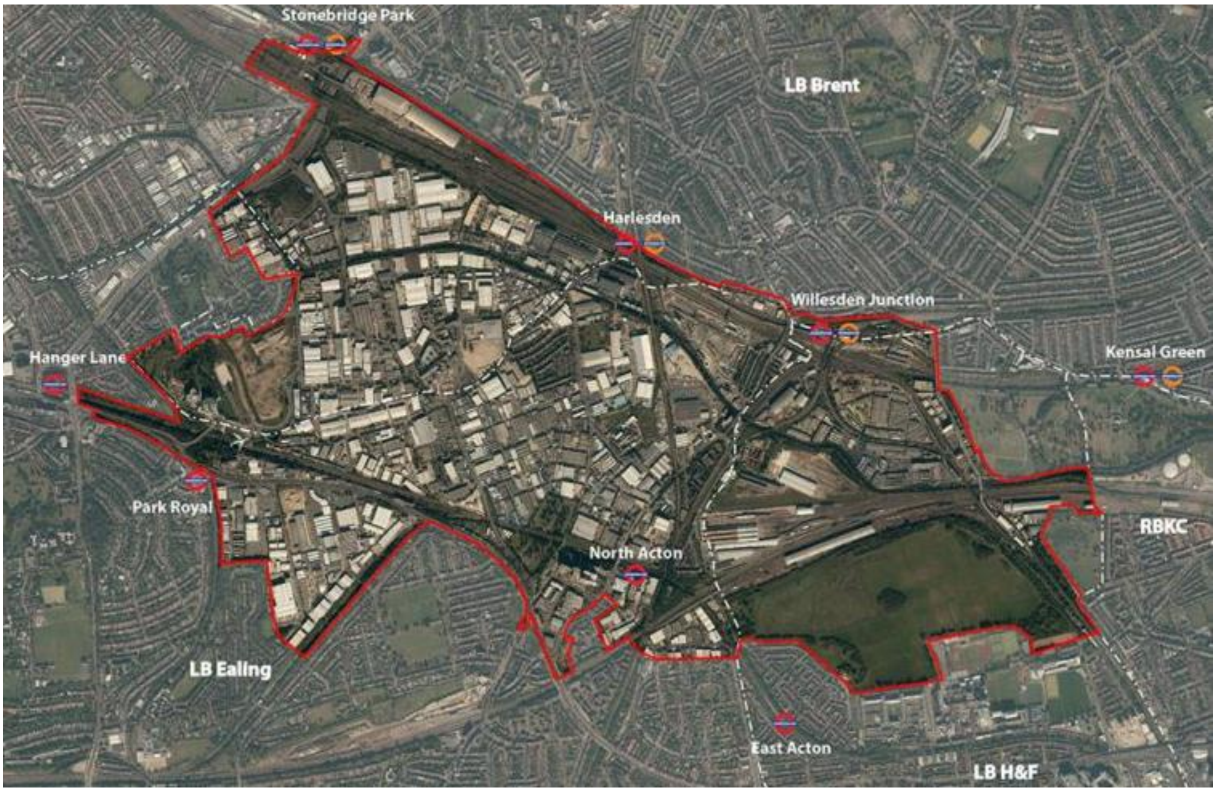


Source: Public Transport Accessibility Level, GLA Datastore from Transport for London

5.6.2 Train journeys

In terms of tube and overground stations, North Acton which is on the Central line lies inside the OPDC Development Zone. There are also a number of stations that lie on the border of the Development Zone, including Hanger Lane, Harlesden, Park Royal, Stonebridge Park, and Willesden Junction, which connected to the Bakerloo, Central, and Piccadilly lines as well as the London Overground.

Map 19: Train stations within the OPDC region



On weekdays in autumn 2014 for the stations in, or bordering on the OPDC Development Zone, 53.9 per cent of journeys were entering these stations, whilst 46.1 per cent were exiting them. This reflects an average of 37,923 entries to London Underground and Overground stations each day, compared to 32,417 exits per day, or 17.0 per cent more entries than exits. The most entries occurred at Willesden Junction with 12,010 entries per day, whilst North Acton had the most exits per day with 8,992. With North Acton in the middle of the OPDC development area, this high number of exits is likely to reflect the commercial nature of the area.

Across the wider OPDC Region, there were 404,757 journeys in total, comprising of 209,417 entries and 195,340 exits. Of these total journeys 180,306 left the OPDC region and 166,229 entered the area, with 29,111 journeys that started and finished within the region. Shepherd's Bush was the busiest station with 67,492 journeys through the station each workday, with 34,703 entries and 32,789 exits. This was followed by Ealing Broadway with 30,052 entries and 28,866 exits per weekday on average.

Table 34: London Underground and Overground station entries, weekdays autumn 2014

Entries							
Station	**Early**	**AM peak**	**Midday**	**PM Peak**	**Evening**	**Late**	**Weekday**
North Acton	385	2,129	1,791	1,429	454	129	6,321
Hanger Lane	542	2,047	1,237	1,820	508	106	6,264
Harlesden	130	968	998	1,203	239	120	3,662
Park Royal	119	714	644	1,264	334	152	3,224
Stonebridge Park	362	1,024	1,022	698	286	88	3,474
Willesden Junction	432	2,885	2,946	3,616	1,687	435	12,010
Total	**1,986**	**10,000**	**9,082**	**11,809**	**3,918**	**1,121**	**37,923**
Total OPDC Region	**10,230**	**65,423**	**51,770**	**53,037**	**20,680**	**8,268**	**209,417**

Source: Transport for London

Table 35: London Underground and Overground station exits, weekdays Autumn 2014

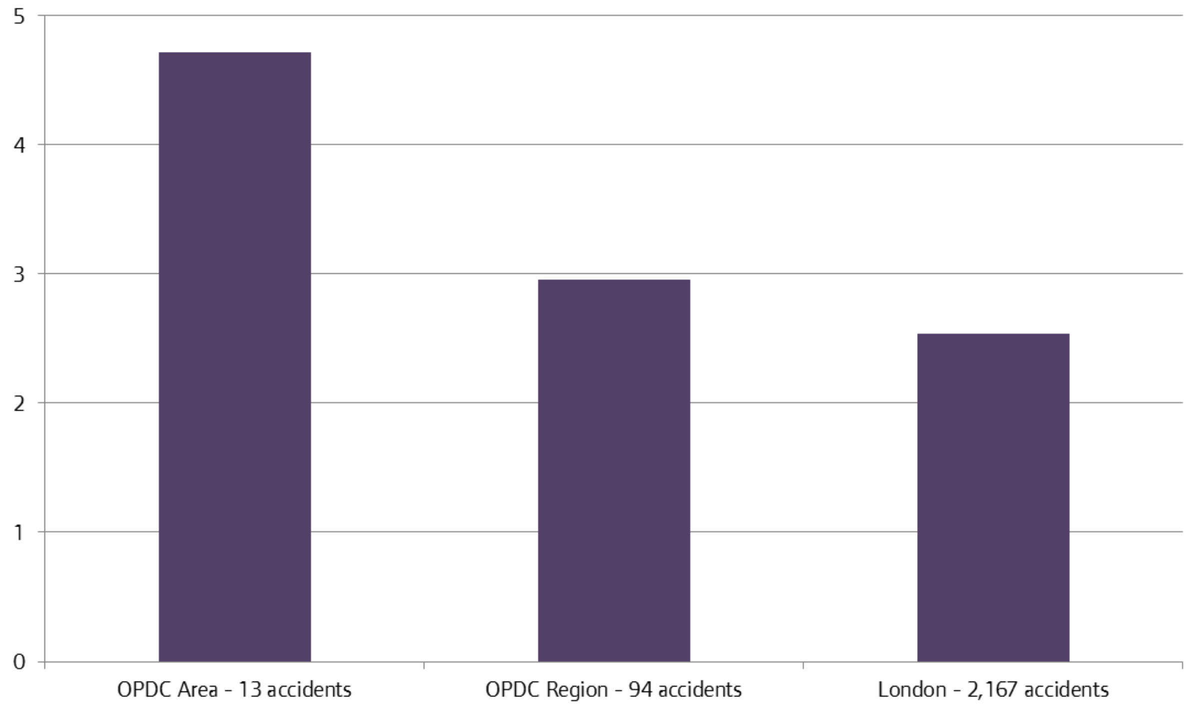
Exits							
Station	**Early**	**AM peak**	**Midday**	**PM Peak**	**Evening**	**Late**	**Weekday**
North Acton	641	2,685	1,584	2,280	1,242	561	8,992
Hanger Lane	364	1,512	1,043	2,013	765	403	6,094
Harlesden	194	889	679	734	388	172	3,056
Park Royal	385	1,079	533	640	319	119	3,080
Stonebridge Park	139	456	891	1,131	525	265	3,407
Willesden Junction	309	1,760	1,631	2,702	983	402	7,788
Total	**2,032**	**8,381**	**6,361**	**9,500**	**4,222**	**1,922**	**32,417**
Total OPDC Region	**8,666**	**41,366**	**44,045**	**59,470**	**27,975**	**13,814**	**195,340**

Source: Transport for London

5.6.3 Fatalities or serious injuries on roads

In 2014, there were 13 accidents within the OPDC Area in 2014, a rate of 4.7 accidents per 10,000 people based on the usual resident population. Across the OPDC Region there were 94 fatalities or serious injuries on roads, accounting for 4.3 per cent of the accidents across London and equivalent to 3.0 accidents for every 10,000 people that live in the area. These rates of accidents are higher than across Greater London, where there were 2,167 accidents in 2014, a rate of 2.5 accidents for every 10,000 Londoners. It is likely that the low population density of the OPDC Area given its commercial nature has contributed to the higher rate of accidents when compared to the London level.

Figure 8: Number of accidents per 10,000 residents, 2014



Source: Road Casualties by Severity, GLA Datastore from Department for Transport

5.6.4 Access to a vehicle

Based on the 2011 Census, households are less likely to have access to a car or van in the OPDC Region than across Greater London. Whilst 55.8 per cent of households in the OPDC area did not have access to a car or van, in the wider region this was slightly lower at 52.4 per cent, with 41.6 per cent of households across London not having access to a car or van (Table 36).

Table 36: Car or van availability for households, 2011 Census

	No cars or vans in household	1 car or van in household	2 cars or vans in household	3 or more cars or vans in household
OPDC Area	55.8%	35.9%	6.8%	1.5%
OPDC Region	52.4%	36.9%	8.8%	1.9%
London	41.6%	40.5%	14.0%	3.9%

Source: 2011 Census

5.7 Business

The OPDC Development Zone is primarily an area of commercial activity, with over a third of land within the zone designated for manufacturing use. In terms of economic activity, it is estimated the area generates £2.58 billion of economic activity, predominantly driven by industries such as information and communication, wholesale and retail trade, and manufacturing. There are over 52,000 people employed within the OPDC Area, double the amount of people that live in the same area, employed by 2,250 different enterprises. Wholesale and retail trade and manufacturing industries were the largest in the area in terms of the number of people employed.

5.7.1 Gross value added

In order to understand the makeup of the economy of the OPDC Area and the wider region, an estimate of economic output has been made by using employment data and GLA Economics estimates of gross value added (GVA) per workforce job[19]. The estimates indicate that there was £2.58 billion worth of economic activity take place in 2012, accounting for 31.3 per cent of GVA in the OPDC Region, and 0.8 per cent of the £325.7 billion of economic activity that took place across London. The estimates indicate that within the wider OPDC Region in 2012 there was £8.24 billion worth of economic activity which took place during that year, 2.5 per cent of total London GVA.

The largest industry in the OPDC Area was the wholesale and retail trade, repair of motor vehicles and motorcycles industry which produced output of £570 million for the year, over one-fifth of total output for the area (22.1 per cent). This was also the largest industry across the wider OPDC Region, accounting for 19.8 per cent of total output, much higher than the share across London of this industry of 8.0 per cent. The second largest industry in the OPDC Area is the information and communication industry, which makes up 21.8 per cent of the economy, compared to 15.8 per cent in the wider region, and 10.4 per cent across London. Manufacturing activity is also more common within the OPDC Area than at the city-wide level, accounting for 13.8 per cent of economic activity compared to just 2.5 per cent for London. Further detail is available in Tables 37 and 38.

[19] GLA Economics has published its latest estimates of GVA per workforce job, the data is available here. These estimates are based on 2012 GVA data released in December 2014, but the comparisons made in this section with the London economy are based on the more recent GVA data released in December 2015. The estimates in this section can be updated to 2014 once the GVA per workforce job estimates are updated to reflect the December 2015 release.

Table 37: Gross value added by industry 2012, current prices

	GVA - 2012 (£ million)		
	OPDC Area	OPDC Region	London
Agriculture, forestry and fishing	..	..	49
Mining and quarrying	..	..	505
Manufacturing	356	716	8,225
Electricity, gas, steam and air conditioning supply	..	..	3,242
Water supply; sewerage, waste management and remediation activities	..	..	1,710
Construction	67	319	15,359
Wholesale and retail trade; repair of motor vehicles and motorcycles	570	1,634	26,054
Transportation and storage	..	..	14,415
Accommodation and food service activities	41	342	9,503
Information and communication	564	1,300	34,004
Financial and insurance activities	..	..	56,958
Real estate activities	..	..	39,574
Professional, scientific and technical activities	172	730	36,667
Administrative and support service activities	..	..	18,179
Public administration and defence; compulsory social security	..	..	12,114
Education	32	424	16,936
Human health and social work activities	171	430	16,920
Arts, entertainment and recreation	15	139	6,566
Other service activities	31	137	7,418
Activities of households as employers; undifferentiated goods- and services-producing activities of households for own use	N/A	N/A	1,300
Total GVA	2,583	8,241	325,700

.. indicates data is disclosive and has been suppressed
Source: GLA Economics calculations

Table 38: Share of gross value added by industry 2012, current prices

Industry	GVA - 2012 (£ million)		
	OPDC Area	OPDC Region	London
Agriculture, forestry and fishing	..	..	0.0%
Mining and quarrying	..	..	0.2%
Manufacturing	13.8%	8.7%	2.5%
Electricity, gas, steam and air conditioning supply	..	..	1.0%
Water supply; sewerage, waste management and remediation activities	..	..	0.5%
Construction	2.6%	3.9%	4.7%
Wholesale and retail trade; repair of motor vehicles and motorcycles	22.1%	19.8%	8.0%
Transportation and storage	..	..	4.4%
Accommodation and food service activities	1.6%	4.1%	2.9%
Information and communication	21.8%	15.8%	10.4%
Financial and insurance activities	..	..	17.5%
Real estate activities	..	..	12.2%
Professional, scientific and technical activities	6.7%	8.9%	11.3%
Administrative and support service activities	..	..	5.6%
Public administration and defence; compulsory social security	..	..	3.7%
Education	1.2%	5.2%	5.2%
Human health and social work activities	6.6%	5.2%	5.2%
Arts, entertainment and recreation	0.6%	1.7%	2.0%
Other service activities	1.2%	1.7%	2.3%
Activities of households as employers; undifferentiated goods- and services-producing activities of households for own use	N/A	N/A	0.4%

.. indicates data is disclosive and has been suppressed
Source: GLA Economics calculations

5.7.2 Employment

In terms of employment that takes place in the OPDC Area there were 52,300 people employed or self-employed that work within the OPDC Area. This accounts for 30.2 per cent of employment in the wider OPDC Region, and 1.1 per cent of all employment within London.

Table 39: Employment by industry, 2014

Industry	OPDC Area	OPDC Region	London
Agriculture, forestry and fishing	..	..	1,200
Mining and quarrying	..	..	3,600
Manufacturing	6,800	12,900	115,300
Electricity, gas, steam and air conditioning supply	..	..	7,000
Water supply; sewerage, waste management and remediation activities	..	..	17,200
Construction	1,300	6,300	150,900
Wholesale and retail trade; repair of motor vehicles and motorcycles	12,900	40,500	612,500
Transportation and storage	..	..	229,700
Accommodation and food service activities	1,400	12,400	365,500
Information and communication	6,100	12,700	378,800
Financial and insurance activities	..	..	358,100
Real estate activities	..	..	117,300
Professional, scientific and technical activities	3,300	14,800	655,900
Administrative and support service activities	..	..	494,500
Public administration and defence; compulsory social security	..	..	220,000
Education	800	9,700	386,400
Human health and social work activities	5,100	15,000	490,300
Arts, entertainment and recreation	400	4,400	131,500
Other service activities	500	2,600	117,600
Total	**52,300**	**173,300**	**4,853,600**

.. indicates data is disclosive and has been suppressed
Source: Business Register and Employment Survey, ONS

In terms of proportion of employment by industry, wholesale and retail trade; repair of motor vehicles and motorcycles is the largest employer in the OPDC Area, accounting for 24.7 per cent of employment, compared to 12.6 per cent of employment across London. Manufacturing is the second largest employer in the OPDC area, comprising 13.0 per cent of employment, compared to 7.4 per cent in the wider region and just 2.4 per cent across London, whilst employment in information and communication is also more common. Industries where employment is less common than across Greater London include accommodation and food service activities, professional, scientific and food service activities, and education (Table 40).

Table 40: Share of employment by industry, 2014

Industry	OPDC Area	OPDC Region	London
Agriculture, forestry and fishing	..	..	0.0%
Mining and quarrying	..	..	0.1%
Manufacturing	13.0%	7.4%	2.4%
Electricity, gas, steam and air conditioning supply	..	..	0.1%
Water supply; sewerage, waste management and remediation activities	..	..	0.4%
Construction	2.5%	3.6%	3.1%
Wholesale and retail trade; repair of motor vehicles and motorcycles	24.7%	23.4%	12.6%
Transportation and storage	..	..	4.7%
Accommodation and food service activities	2.7%	7.2%	7.5%
Information and communication	11.7%	7.3%	7.8%
Financial and insurance activities	..	..	7.4%
Real estate activities	..	..	2.4%
Professional, scientific and technical activities	6.3%	8.5%	13.5%
Administrative and support service activities	..	..	10.2%
Public administration and defence; compulsory social security	..	..	4.5%
Education	1.5%	5.6%	8.0%
Human health and social work activities	9.8%	8.7%	10.1%
Arts, entertainment and recreation	0.8%	2.5%	2.7%
Other service activities	1.0%	1.5%	2.4%

.. indicates data is disclosive and has been suppressed
Source: Business Register and Employment Survey, ONS

5.7.3 Enterprises

In the wider OPDC Region there were 16,390 enterprises in 2015, 13.7 per cent of these enterprises were located in the OPDC Area, which totals 2,250 enterprises. In terms of the types of enterprises, the shares for the wider OPDC region are broadly in-line with those at the London level (see Table 42). However, within the OPDC development area, there is a higher share of companies (including building societies), which is offset primarily by a lower share of sole proprietors.

Table 41: Enterprise numbers by legal status, 2015

Private enterprises by legal status	OPDC Area	OPDC Region	London
Total Enterprises	**2,250**	**16,390**	**444,875**
Total - Private Sector	2,245	16,365	443,905
Companies (including building societies)	1,955	13,210	353,750
Sole proprietors	165	2,240	63,690
Partnerships	50	570	15,330
Not profit body or mutual association	50	350	11,125

Source: Inter Departmental Business Register, ONS

Table 42: Private enterprise share, by legal status, 2015

Private enterprise share by legal status	OPDC Area	OPDC Region	London
Companies (including building societies)	88.1%	80.7%	79.7%
Sole proprietors	7.4%	13.7%	14.3%
Partnerships	2.3%	3.5%	3.5%
Not profit body or mutual association	2.3%	2.1%	2.5%

Source: Inter Departmental Business Register, ONS

In terms of the size of private enterprises, 90.4 per cent of enterprises in the OPDC Region are micro-enterprises, broadly in-line with the wider London level of 90.3 per cent. However, within the OPDC Area the share of micro enterprises is much lower at 81.1 per cent. This is offset by higher shares of larger businesses with the share of small businesses (10 to 49 employees) double that of both the wider-region and London at 16 per cent of all private enterprises (Table 44).

Table 43: Private enterprise numbers, by size, 2015

Enterprises by size	OPDC Area	OPDC Region	London
Micro (0-9) - total	1,800	14,800	400,705
Small (10-49) - total	355	1,310	35,500
Medium (50-249) - total	55	245	6,780
Large (250+) - total	10	55	1,895

Source: Inter Departmental Business Register, ONS

Table 44: Private enterprise share, by size, 2015

Enterprise share by size (private sector)	OPDC Area	OPDC Region	London
Micro (0-9) - total	81.1%	90.4%	90.3%
Small (10-49) - total	16.0%	8.0%	8.0%
Medium (50-249) - total	2.5%	1.5%	1.5%
Large (250+) - total	0.5%	0.3%	0.4%

Source: Inter Departmental Business Register, ONS

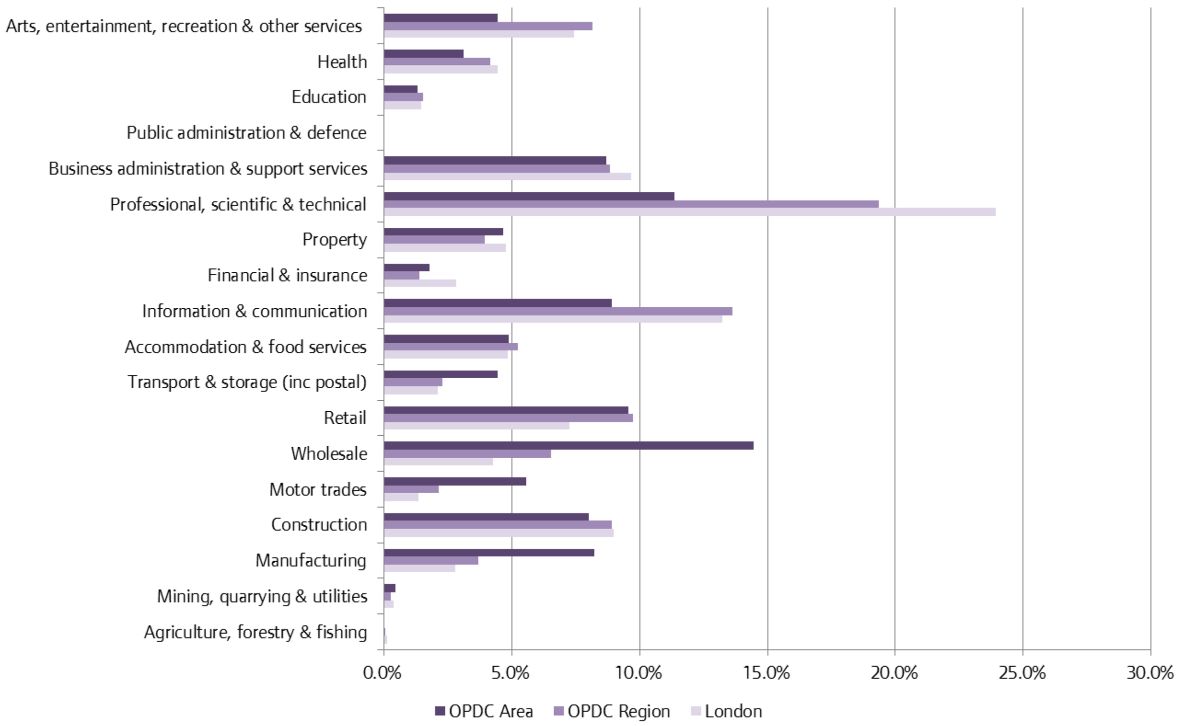
The enterprises that operate within the OPDC Area in terms of industry are quite different to those at the wider London level. Wholesale trade is the most common industry in the area, accounting for 14.5 per cent of enterprises in the area, compared to the wider London share of 4.3 per cent. Other industries that are more common within the development area include manufacturing which accounts for 8.2 per cent of enterprises compared to 2.8 per cent London-wide and motor trades which at 5.6 per cent is over four-times more common within the OPDC Area compared to Greater London. Whilst professional, scientific and technical services are the second largest industry in the development area at 11.4 per cent of enterprises, this is still well below the share of this industry in Greater London of 23.9 per cent (Table 45). The different industry shares are shown in Figure 9.

Table 45: Private enterprise share, by industry, 2015

Industry	OPDC Area	OPDC Region	London
Agriculture, forestry & fishing	0.0%	0.1%	0.1%
Mining, quarrying & utilities	0.4%	0.3%	0.4%
Manufacturing	8.2%	3.7%	2.8%
Construction	8.0%	8.9%	9.0%
Motor trades	5.6%	2.2%	1.4%
Wholesale	14.5%	6.5%	4.3%
Retail	9.6%	9.7%	7.3%
Transport & storage (inc postal)	4.5%	2.3%	2.1%
Accommodation & food services	4.9%	5.3%	4.8%
Information & communication	8.9%	13.6%	13.2%
Financial & insurance	1.8%	1.4%	2.9%
Property	4.7%	3.9%	4.8%
Professional, scientific & technical	11.4%	19.3%	23.9%
Business administration & support services	8.7%	8.8%	9.7%
Public administration & defence	0.0%	0.0%	0.0%
Education	1.3%	1.6%	1.5%
Health	3.1%	4.2%	4.5%
Arts, entertainment, recreation & other services	4.5%	8.2%	7.4%

Source: Inter Departmental Business Register, ONS

Figure 9: Private enterprise share, by industry, 2015



Source: Inter Departmental Business Register, ONS

6 Conclusion

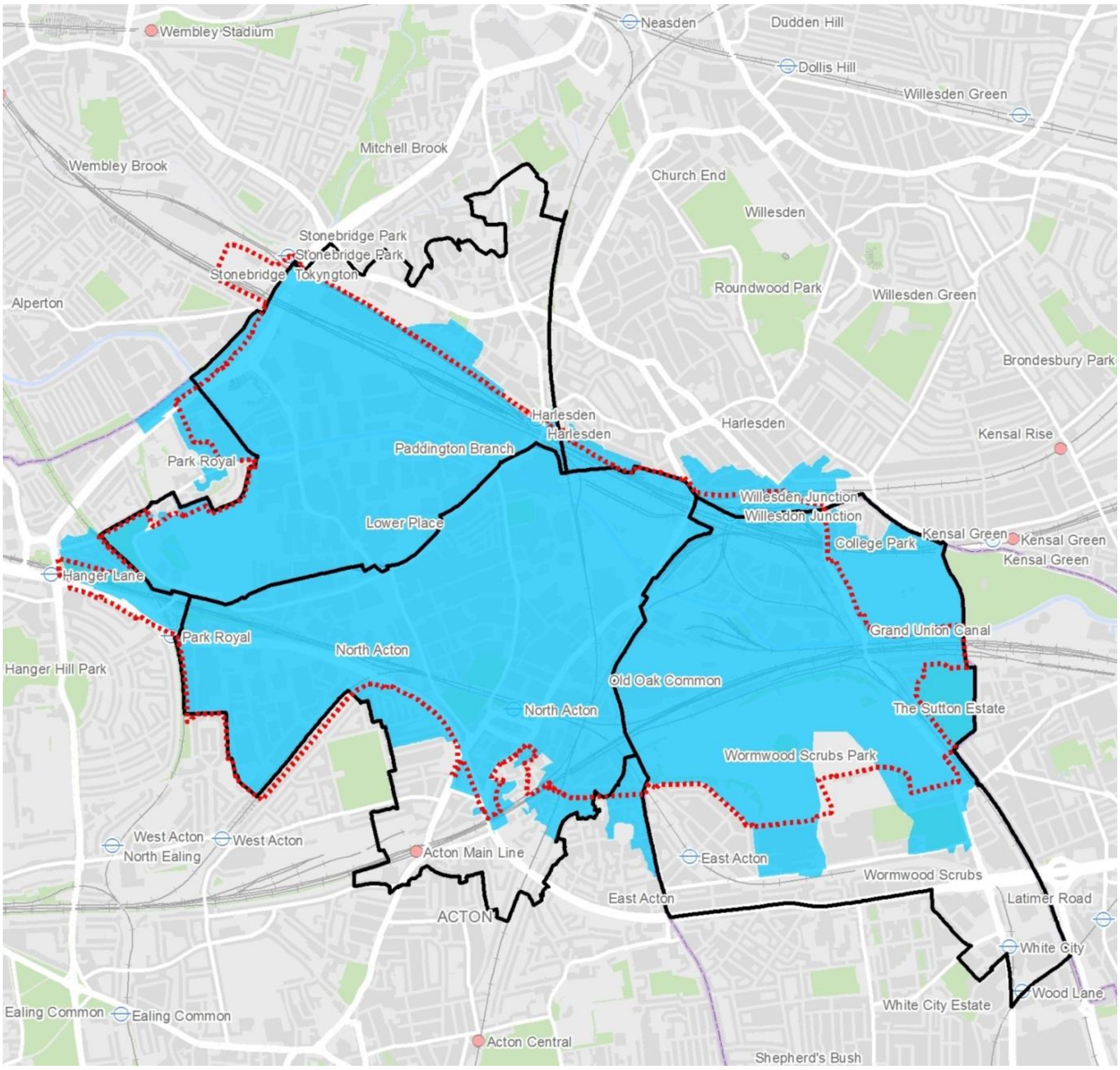
This report sets out the socio-economic characteristics of the Old Oak and Park Royal area, analysing how they compare to Greater London as a whole. Generally the socio-economic measures of the area indicate that when compared to Greater London, the area is disadvantaged across a number of different indicators, and that there is a strong business presence in the area, primarily in wholesale and retail trade, and manufacturing.

The indicators identified in this report can continue to be measured over time, to measure the change that occurs in the area as the regeneration of the development zone takes place.

7 Appendix

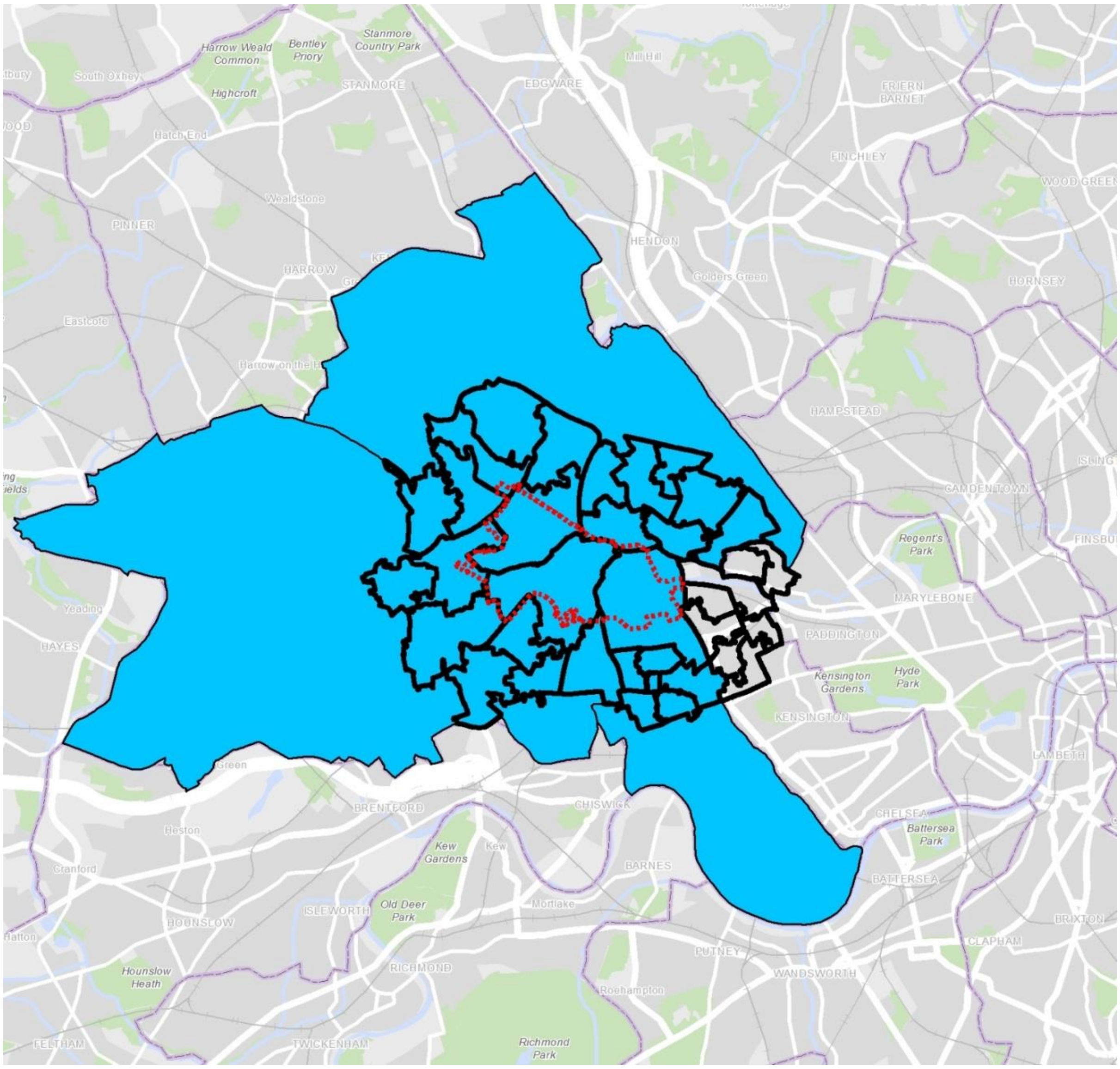
Map 20 demonstrates the difference between the OPDC Area as defined in this report (indicated by black lines), and the Census output areas identified in the SHMA (indicated by blue shading).

Map 20: OPDC Area and the SHMA Census output area



Map 21 demonstrates the difference between the OPDC Region as defined in this report (indicated by black lines), and the SHMA housing market area (indicated by blue shading).

Map 21: OPDC Region and SHMA housing market area



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