



ACKLAM VILLAGE W10
on Portobello Road
FOOD | BAR | MUSIC | ART

UNEXPECTED TALES
LIVE MUSIC BAR

BAY 58 BAR

FOOD

3 ACRES DESTINY WEST

2 BIGOS

WESTWAY TRUST

Economic and Social Baseline Report

Hatch Regeneris

May 2019



Baseline Economic and Social Data

This baseline report brings together the data which was collated when developing the main report. It presents key statistics for each of the three wellbeing themes, as summarised in the diagram below.

Where possible the most up to date data has been used, however for a number of statistics the only data available is from the 2011 Census. Statistics are reported for the following geographies:

- + Local Impact Area 'LIA' (North Kensington's 5 wards combined: Dalgarno, St Helen's, Golborne, Notting Dale, Colville). For older statistical datasets the pre-2014 ward boundaries have been used
- + Royal Borough of Kensington and Chelsea
- + London



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Key Statistics

| Indicator | Area Statistics | | |
|---|--|--|--|
| | North Kensington LIA | RBKC | London |
| Social | | | |
| Ethnicity (Census 2011) | 58% White, 17% Black, 17% Mixed/Other, 8% Asian | 71% White, 7% Black, 17% Mixed/Other, 10% Asian | 60% White, 13% Black, 8% Mixed/Other, 18% Asian |
| Language: % speaking English (Census 2011) | 76.6% | 72.0% | 77.9% |
| Economic Activity Rate (Census 2011) | 68% (19,000 people) | 69% | 72% |
| Claimants as a proportion of residents aged 16-64 (ONS 2018) | 2.3% (605 people) | 1.9% | 2.2% |
| Median Household Earnings (GLA 2015) | £36,613 | £56,620 | £39,110 |
| Indices of Multiple Deprivation (DCMS 2015) | 72% of LSOAs are in the top 20% most deprived in the country | 24% of LSOAs are in the top 20% most deprived in the country | 23% of LSOAs are in the top 20% most deprived in the country |
| % Patients with Depression at GP Surgeries (NHS 2015/16) | 11% | - | 8% |
| Economic | | | |
| Total Employment (Growth 2012-17) (ONS 2012, 2017) | 19,700 (+35%) | 137,500 (+9%) | 5,270,000 (+14%) |
| % jobs in high value sectors (comprising Creative, Digital and Knowledge sectors) (ONS 2017) | 41% | 56% | 49% |
| Commercial Rental Value (Growth 2010-18) (CoStar 2019) | Retail: £70 per sq. ft (+29%) Office: £45 per sq. ft (+85%) | Retail: £84 per sq. ft (+44%) Office: £50 per sq. ft (+65%) | Retail: £40 per sq. ft (+30%) Office: £50 per sq. ft (+50%) |
| Start-up Rate (Companies House 2018) | 14 start-ups per 1,000 residents | 29 start-ups per 1,000 residents | 22 start-ups per 1,000 residents |
| Environmental | | | |
| Levels of PM2.5 air pollution (GLA 2013) | 5% of output areas have over 18µg/m ³ of PM2.5 | 11% of output areas have over 18µg/m ³ of PM2.5 | 2% of output areas have over 18µg/m ³ of PM2.5 |

Baseline Economic and Social Data

Social Wellbeing - Demography

Population

- + The LIA has an average population of 38,950 individuals, which represents around 1 out of 4 individuals in Kensington and Chelsea.
- + More than half of LIA population is from the UK, 30% from other countries and 13% from other EU countries (2011).

Age

- + The LIA's population is older than London's, with a notably low younger working age population aged 20-39.
- + When compared to London, LIA's population is older, with a notably low younger working age population aged 20-39.

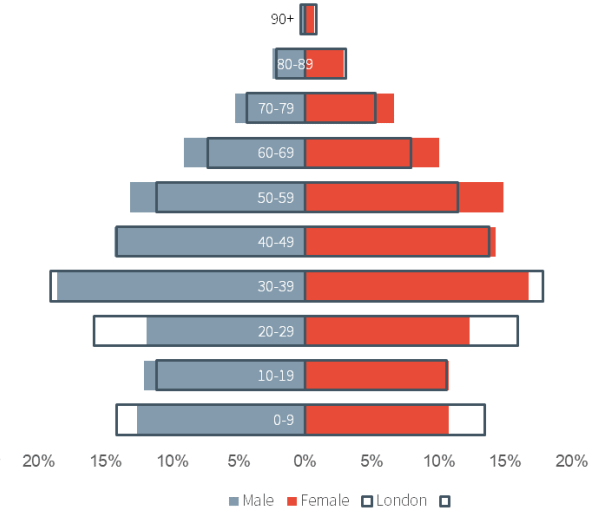
Ethnicity

- + Population diversity: Census broad ethnic groups – 58% white, 17% black, 7% mixed/other (2011). Within this, the area has a mix of established and emerging communities:
 - + There is a longstanding White Irish community, making up 3-4% of each ward's population
 - + St Helen's has a small Roma Traveller community who are long established in the area
 - + Since the Census included Arab as a separate category, the emerging Arab community in the area has become apparent, especially in Notting Dale and Golborne where Arab's make up 7% of the populations
 - + Of those not born in the UK, around 25-30% have been in the area for more than 10 years

Language

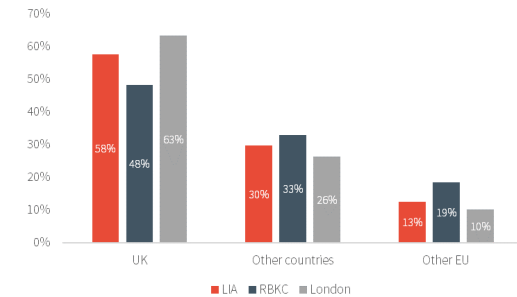
- + English is the language spoken by 76.6% of the population in the LIA. Languages most spoken after this are Asian languages, Arabic and Spanish/Portuguese (2011).
- + More recent figures from the 2018 School Census Data indicate that there are around 47.8% of pupils in the LIA whose first language is known or believed to be other than English. This is slightly higher than the London average (44.6%) and RBKC average (43.7%).

LIA's Population Structure, 2017



Source: ONS 2017

LIA's Country of Origin, 2011



Source: Census 2011

LIA's Ethnicities, 2011



Source: Census 2011

Baseline Economic and Social Data

Social Wellbeing – Skills and Employment

Education and Skills

School Performance (2018)

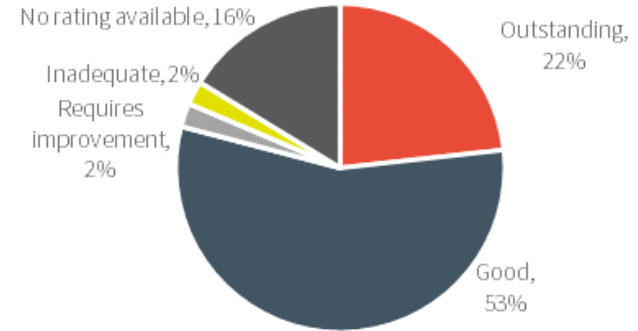
75% of schools in the LIA are rated as good or outstanding by Ofsted. However performance data from local schools shows a mixed picture:

- + All the Primary schools in the area with data available are on or above the national average in progress 8 scores. 38% are above average in at least two of the measures (the measures are Reading, Writing and Maths).
- + However, Secondary schools and colleges are below the national average in progress 8 scores. Out of the 10 schools/colleges with data available, 7 were below or well below the national average.

Skills Levels of Residents (2011)

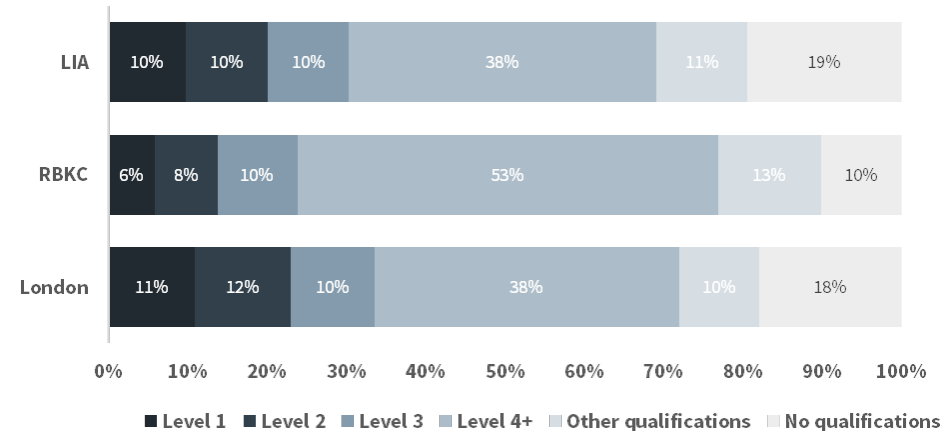
- + LIA has a higher percentage of residents with no or low level qualifications than RBKC, however these are similar levels to London

Rating of schools within the LIA, 2018



Source: Ofsted, 2018

Qualifications of Residents, 2011



Source: Census 2011

Baseline Economic and Social Data

Social Wellbeing – Skills and Employment

Employment and Economic Participation

Economic Activity (2011)

+ Significant differences in economic activity between the wards. In 2011, Golborne had the lowest economic activity rates and highest levels of unemployment. Whilst Colville aligned with or performed better than RBKC and London in both these indicators.

Economic Activity Rates, 2011

| | Colville | Golborne | Notting Barns | St Charles | LIA | RBKC | London |
|------------------------------|----------|----------|---------------|------------|-----|------|--------|
| Economically Active | 74% | 65% | 66% | 67% | 68% | 69% | 72% |
| Unemployed | 6% | 8% | 7% | 7% | 7% | 6% | 7% |
| Economically Inactive | 26% | 35% | 34% | 33% | 32% | 31% | 28% |

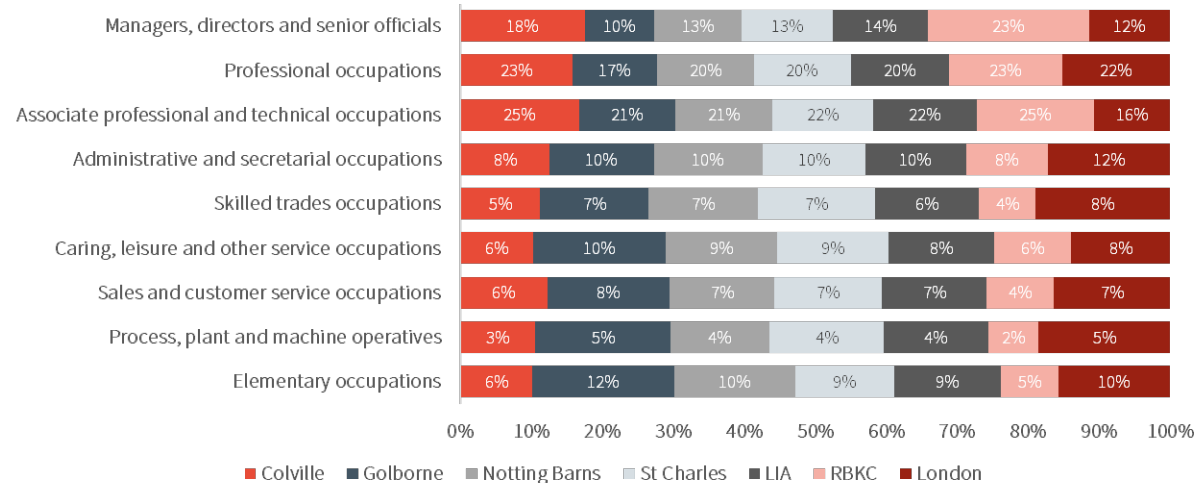
Source: Census, 2011

Occupational Profile (2011)

+ The LIA has a significantly lower percentage (14%) of the highest level of occupations, Managers, Directors and Senior Officials than RBKC (23%). However, it is at similar levels to London

+ There is disparity between the wards that make up the LIA. Colville has a higher percentage of higher skilled occupations than the other wards

Occupational profile, 2011



Source: Census, 2011

Baseline Economic and Social Data

Social Wellbeing – Health

Physical Health

General Health of Residents (2011)

- + Proportion of population which is in very good health is slightly lower in the LIA than in the RBKC or London.

Life Expectancy

- + 5 North Kensington wards have a life expectancy of 14 years shorter for men and 12 years shorter for women than the south of the borough

Prevalence of Disease

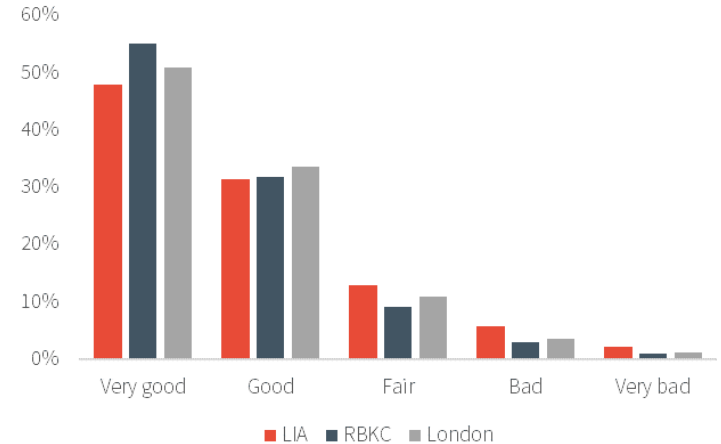
- + Asthma and diabetes are more prevalent in the North of the borough, especially Golborne and Dalgarno
- + The LIA suffers from slightly higher percentages of childhood obesity than RBKC, especially for young children aged 4-5. The LIA is in line with London levels
- + Across all geographies, childhood obesity increases between reception and year 6, however this increase is particularly stark in Dalgarno and Notting Dale

Westway Sports Centre (2019)

Data from Westway Sport and Fitness shows the profile of users. 51% of users are from outside the Borough and 27% are from within the LIA. Of those members from within the LIA:

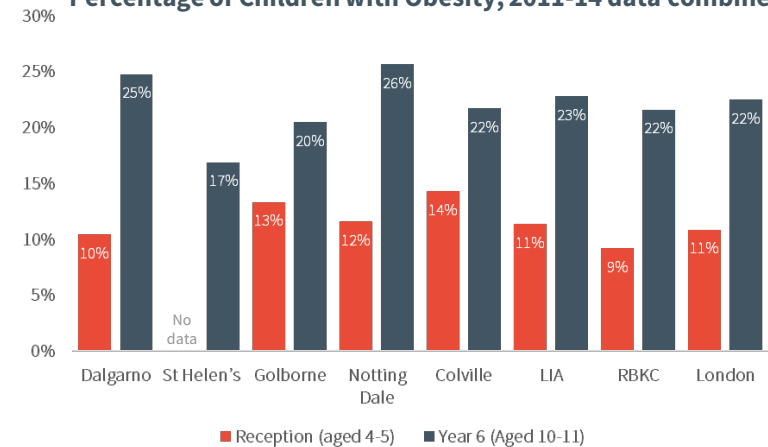
- + 60% are male
- + 44% are aged 0-25; 28% are under 16
- + 7% are students
- + Less than 1% are unemployed, disabled or a concession due to low income

General health of people in the LIA, 2011



Source: Census, 2011

Percentage of Children with Obesity, 2011-14 data combined



Source: Department of Health, 2014

Social Wellbeing – Health

Mental Health

CCG Level (2016/17)

+ A breakdown of London’s 32 NHS Clinical Commissioning Groups (CCG) indicates that the West London CCG (which oversees the various medical practices in Chelsea and Kensington) is ranked as having the highest prevalence GP patients with mental health conditions. It also has a higher proportion of patients with depression and dementia than at the London level.

| Prevalence of mental health conditions in the LIA's NHS clinic | | | | | |
|--|----------|------------|----------|-----------------------|---------------|
| | Dementia | Depression | Epilepsy | Learning disabilities | Mental health |
| London | 0.5% | 6.6% | 0.6% | 0.4% | 1.1% |
| NHS West | 0.6% | 7.7% | 0.5% | 0.3% | 1.5% |
| NHS West Ranking (out of 32 London clinics) | 12th | 5th | 29th | 29th | 1st |

* Cells highlighted in red indicate a higher prevalence than at the London level.

GP Surgeries (2015/16)

+ % of patients recorded with depression in GP Surgeries in the LIA in 2015/16 is consistently around 11%. This is significantly higher than CCG West London average (7%) and London average (8%)

Wellbeing (2013)

+ The GLA Well-Being scores are a composite measure of the well-being of residents based on 12 indicators. There is significant variation in the well-being scores of the wards across Kensington and Chelsea. St Charles has the lowest levels of well-being with a score of -6, whilst Colville has the highest with a score of -2. This stands in stark comparison with the borough’s well-being score of 5.

| Rank | Well-being score | Key drivers holding back wellbeing* |
|------|--------------------|--|
| 1 | RBKC (5) | Childhood obesity; crime rate; unauthorised absence in all schools |
| 2 | London (-1) | Childhood obesity; crime rate; dependent children in out of work families |
| 3 | Colville (-2) | Crime rate; childhood obesity; incapacity benefit rate |
| 4 | Notting Barns (-2) | Incapacity benefit rate; dependent children in out of work families; unemployment |
| 5 | Golborne (-5) | Incapacity benefit rate; unemployment; dependent children in out of work families; |
| 6 | St Charles (-6) | Incapacity benefit rate; dependent children in out of work families; unauthorised absence in all schools |

Source: London Ward Well-being Scores (2013)

* Key drivers are the indicators with the most negative score

Social Wellbeing – Social Participation

Isolation

Crime Statistics (2018)

- + Between March 2017 and March 2019, the LIA had 11,893 reported crimes. Colville had the highest number of reported crimes of the LIA wards, accounting for 32% of the LIA total
- + Last year RBKC had the 6th highest stop and search numbers in London. The main reasons were drugs, weapons and stolen property
- + Last year almost 70% of crimes in North Kensington were theft or violence against the person
- + The LIA's crime rate was 163 per 1,000 population last year compared to 150 in the rest of the borough

Physical Accessibility (2015)

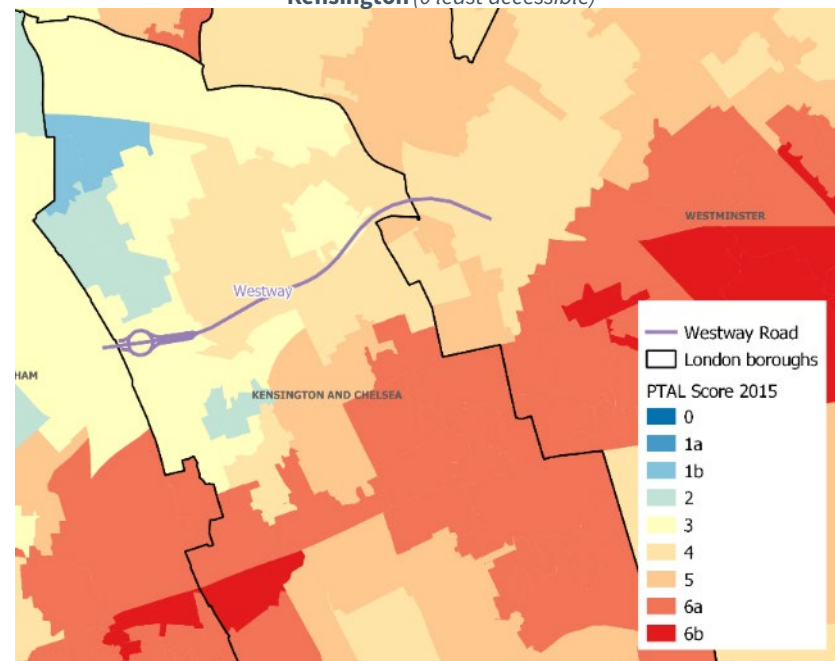
- + Accessibility around the Westway is generally lower than in southern parts of the borough. Areas of Dalgarno, St Helen's and Notting Dale also struggle with low accessibility levels.

Crime Statistics

| | Dalgarno | St Helen's | Notting Dale | Colville | Golborne | LIA |
|---|-------------|-------------|--------------|---------------|-------------|---------------|
| Reported Crimes March 2017-19 (% of LIA total) | 1,684 (14%) | 1,484 (12%) | 2,242 (19%) | 3,843 (32%) | 2,640 (19%) | 11,893 (100%) |
| Crime Rate per 1,000 population | | | | | | |
| | | LIA | RBKC | London | | |
| | | 163 | 150 | 102 | | |

Source: Met Police 2019

Public Transport Accessibility Level (PTAL) map of North Kensington (0 least accessible)



Source: TfL 2015

Baseline Economic and Social Data

Social Wellbeing – Social Participation

Engagement & Trust

Community Stability (2018)

- + The London Vulnerable Localities Profile published by MOPAC shows which wards in London are at risk of community stability issues. Its calculated by overlaying data on crime, health, educational attainment and population density.
- + All the wards in the LIA are above the London average, with Golborne most at risk of community instability

Vulnerable Localities Score, 2018

| | Dalgarno | St Helen's | Notting Dale | Colville | Golborne | London |
|------------------------------------|----------|------------|--------------|----------|----------|--------|
| Vulnerable Localities score | 109.5 | 114.5 | 120.8 | 119.9 | 133.5 | 100 |

Source: MOPAC 2018

Young People

Absence at School (2013)

- + The LIA has a slightly higher percentage of unauthorised pupil absences than across RBKC and London
- + St Charles ward had the highest percentage of unauthorised absences at 1.6%

Pupil Absences

| | Golborne | St Charles | Notting Barns | Colville | LIA | RBKC | London |
|--|----------|------------|---------------|----------|------|------|--------|
| % un-authorised absences in all schools, 2013 | 1.3% | 1.6% | 1.1% | 1.3% | 1.3% | 1.2% | 1.1% |

Source: GLA's Ward Atlas 2013

Youth Crime (2017/18)

- + In 2017, 106 young people were victims of serious youth violence in RBKC
- + There were 38 serious knife crime offences and 10 gun offences by under 25s in RBKC in 2017
- + Youth stop and search rates in Kensington and Chelsea:
 - + Aged under 10: 0.2 per 1,000 population (London is 0)
 - + Aged 10-14: 33 per 1,000 population (London is 17)
 - + Aged 15-19: 396 per 1,000 population (London is 116)

Baseline Economic and Social Data

Social Wellbeing - Personal Stability and Prosperity

Financial Security

Household Earnings (2015)

- + Median household earnings across the LIA are significantly lower than at the borough. There are also important variations within the LIA, for example between Colville (£43,560) and Golborne (£30,100).

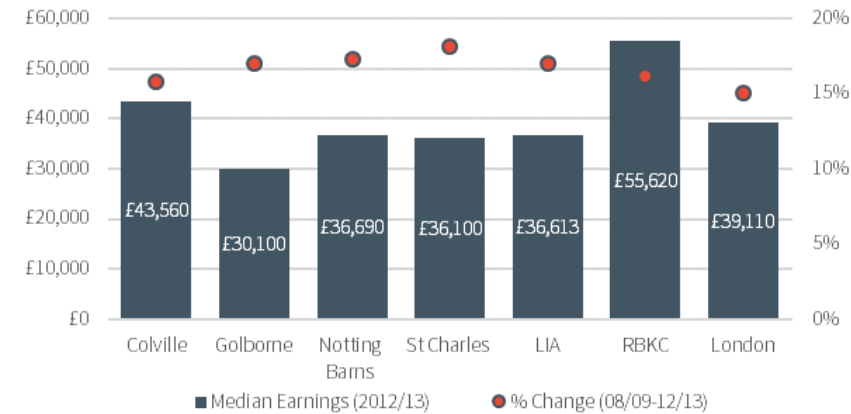
Free School Meals (2018)

- + 22% of FSM eligible pupils take free school meals in the LIA. This is compared to 22% across RBKC and 18% in Inner London.

Claimant Count (2018)

- + Claimant count in the LIA is higher than for RBKC. There's significant variation within the LIA wards, Golborne has the highest claimant count whereas St Helen's has the lowest.

Median Household Earnings, 2012/2013



Source: GLA Household Income Estimates, 2015

| Geography | Claimant count 16+ | Claimants as a proportion of residents aged 16-64 |
|---------------|--------------------|---|
| Colville | 120 | 1.9% |
| Dalgarno | 100 | 2.1% |
| Golborne | 175 | 3.2% |
| Notting Dale | 135 | 2.6% |
| St. Helen's | 75 | 1.8% |
| LIA | 605 | 2.3% |
| RBKC | 1,980 | 1.9% |
| London | 134,180 | 2.2% |

Source: ONS, 2018

Baseline Economic and Social Data

Social Wellbeing - Personal Stability and Prosperity

Financial Security

Indices of Multiple Deprivation (2015)

In the LIA:

- + 37% of LSOAs are in the top 10% most deprived in the country
- + 72% of LSOAs are in the top 20% most deprived in the country
- + All the LSOAs are in the top 60% most deprived in the country

Housing Security

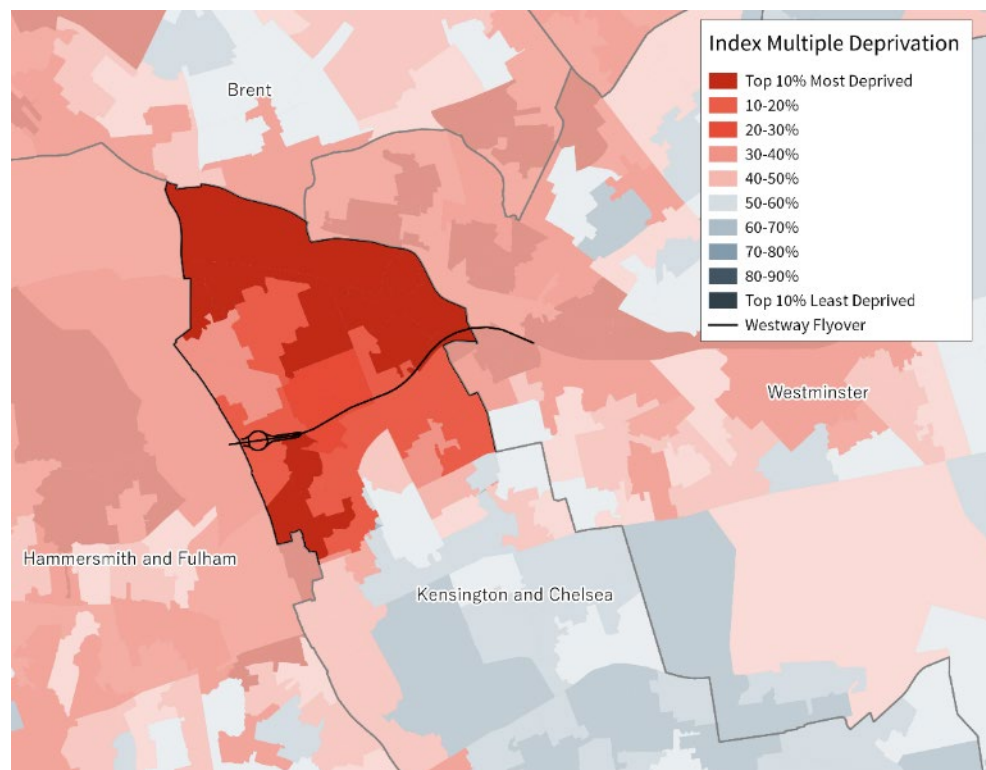
Tenure

To the north and west of the Westway, over 60-70% of tenure is social renting. In Colville this is much lower; around 43% social rented. St Helen's has the highest proportion of people owning their homes at 34%.

Social Housing (2018)

- + According to DCLG, in 2018, there were 3,330 households on RBKC's housing waiting list

Indices of Multiple Deprivation, 2015



Source: DCMS 2015

Baseline Economic and Social Data

Economic Wellbeing – Enterprise

Entrepreneurialism

Start-up Rates (2017)

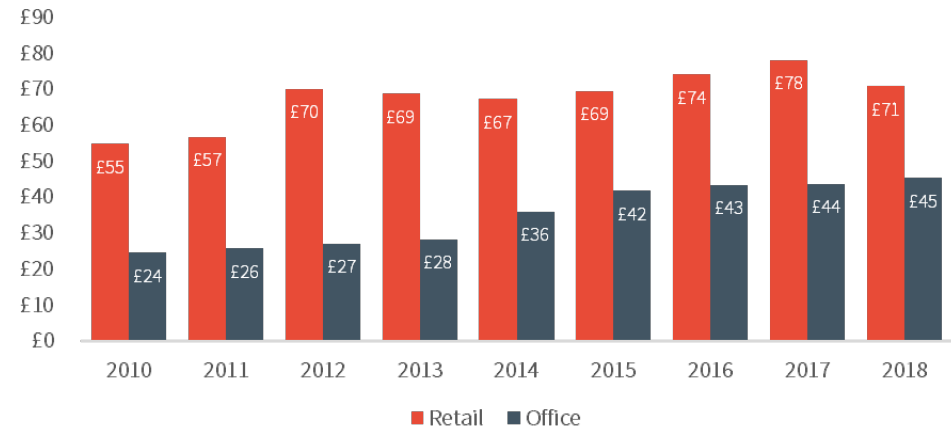
- + The start up rate was 14 start-ups per 1,000 residents in 2017 in North Kensington, compared to an average of 29 per 1,000 residents across the rest of the borough. Within North Kensington, Golborne has the highest start up rate (25 per 1,000) and Dalgarno has the lowest (6 per 1,000)

Space for Local Businesses

Commercial Rent (2019)

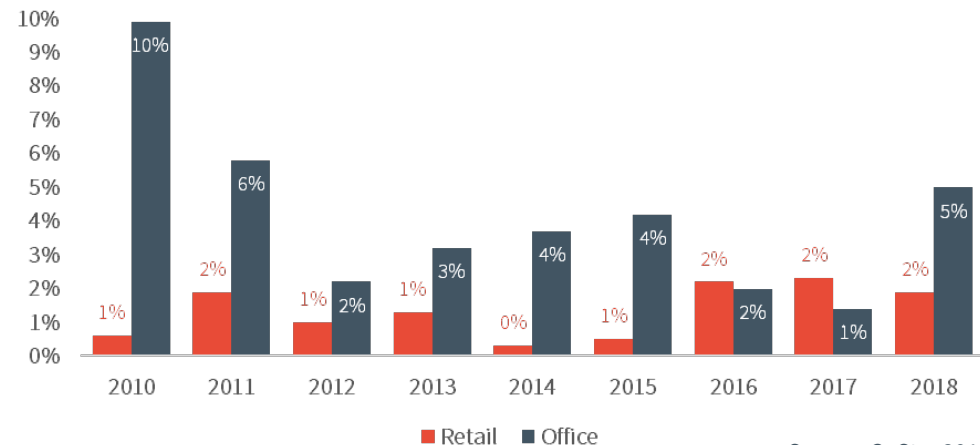
- + Retail rent is around £70 psf. in North Ken, compared to the London average of £40 psf. Growth from 2010-2018 also hasn't been as large in North Ken (+29%) as RBKC (+44%)
- + Office rents over the last 8 years have grown at a faster rate in North Kensington (+85%) compared to the rest of the borough (+65%) and are now at around £45psf (London average of £50psf)
- + Vacancy rates have ben variable over the last 8 years. Office vacancy rate is currently high at around 5%. Retail vacancy rates have remained steady over time at around 1-2%

Retail and Office Rental Values, 2010-18



Source: CoStar 2019

Retail and Office Vacancy Rates, 2010-18



Source: CoStar 2019

Baseline Economic and Social Data

Economic Wellbeing - Economic Vitality and Business Responsibility

A Resilient Local Economy

Employment (2017)

- + There are around 137,500 jobs in LB Kensington and Chelsea. Jobs in the LIA account for 14% of the Borough total.
- + In 2017 the largest employing sectors in the LIA are Public Admin, Education and Health (25%) and Business Support Services (20%) – focus on activities providing services to the local population
- + Key economic hubs in the area are Ladbrooke Grove and Portobello Road. Portobello Road ranks 396th in the UK in the venue score UK Shopping Index
- + There has been an overall increase in employment since 2012 (+9%), with an important increase taking place in Golborne (+51%) and Notting Barns (41%). Colville has experienced a slower growth in employment.

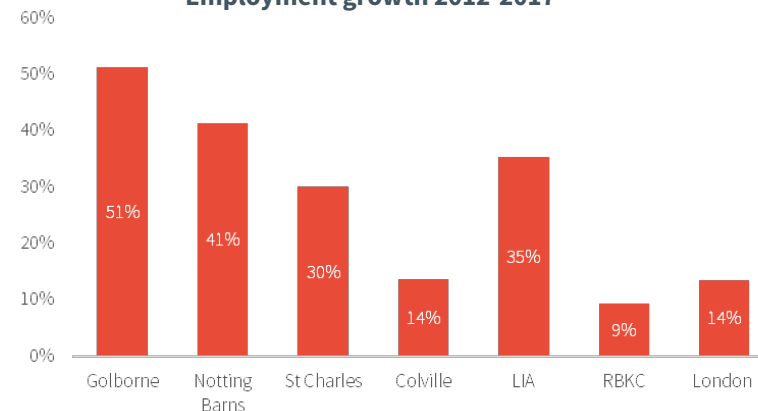
Employment practices

London Living Wage

- + Across RBKC 22% of jobs are paid below the London Living Wage, this is higher than London (19%).

| | 2017 Employment |
|---------------|-----------------|
| Golborne | 6,500 |
| Notting Barns | 5,400 |
| St Charles | 3,600 |
| Colville | 4,100 |
| LIA | 19,700 |
| RBKC | 137,500 |
| London | 5,269,600 |

Employment growth 2012-2017



Source: BRES, 2012-2017

Baseline Economic and Social Data

Environmental Wellbeing – Public Realm & Open Space

Green/open spaces

- + The access to green space varies across the wards. St Helen's is the only ward in the LIA with below London average's in access to open space.

Public realm

Traffic Incidents (2014)

- + Dalgarno and Notting Dale experience a significantly higher percentage of road collisions which are fatal or serious than across the LIA, RBKC or London

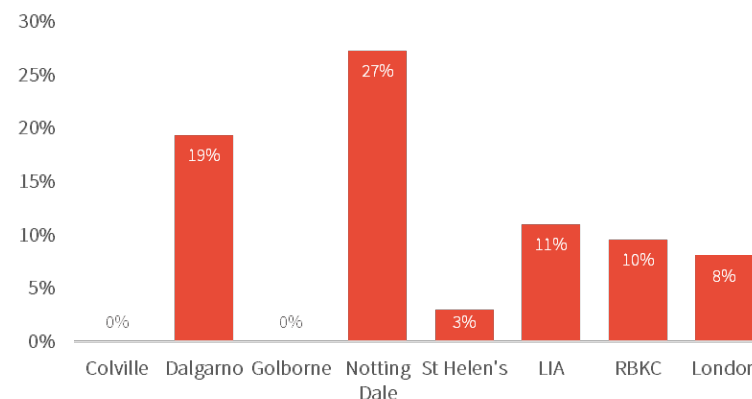
Percentage of households with access to different kinds of green space, 2015

| | Open Space | Local Parks | District Parks | Metropolitan Parks | Regional Parks |
|--------------|------------|-------------|----------------|--------------------|----------------|
| Dalgarno | 89 | 99 | 0 | 100 | 0 |
| St Helen's | 46 | 98 | 0 | 100 | 0 |
| Golborne | 67 | 98 | 0 | 100 | 0 |
| Notting Dale | 94 | 100 | 16 | 100 | 0 |
| Colville | 79 | 96 | 29 | 100 | 0 |
| London | 51.5 | 38.3 | 35.6 | 55.6 | 26 |

Source: GLA 2015

Cell is coloured in red when it is below the London average

Percentage of road collisions which are fatal or serious, 2014



Source: DfT 2014

Baseline Economic and Social Data

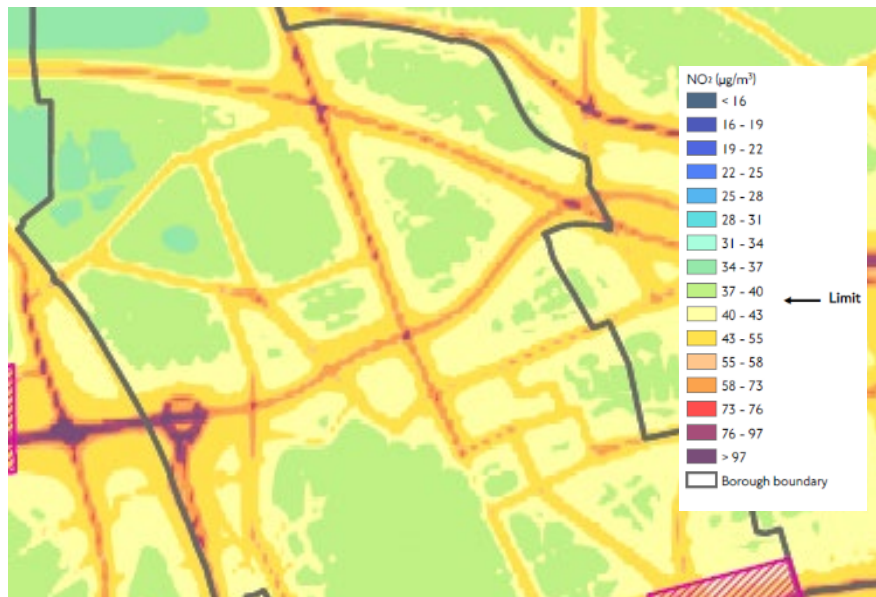
Environmental Wellbeing – Air & Noise Pollution

Air Quality

Pollution Levels

- + The whole stretch of the Westway suffers from poor air quality which is above national No2 limits. The western edge of the Westway significantly exceeds the limit reaching dangerous levels.
- + This area also suffers from high levels of PM10 and PM2.5 particulates which are associated with respiratory problems.

Air quality in North Kensington (No2), 2013



Source: London Atmospheric Emissions Inventory. TfL, 2013

Air quality in North Kensington (PM2.5), 2013



Source: GLA, 2013

- + Along the Westway Flyover in North Kensington, PM2.5 levels are consistently over 18µg/m³.
- + 5% of output areas across the LIA have PM2.5 levels above 18µg/m³, compared to 2% across the rest of London



London

Manchester

0207 336 6188

0161 234 9910

london@regeneris.co.uk

manchester@regeneris.co.uk

www.hatchregeneris.co.uk