TBP7

LONDON LEGACY DEVELOPMENT CORPORATION

SPATIAL PORTRAIT BACKGROUND PAPER

OCTOBER 2018

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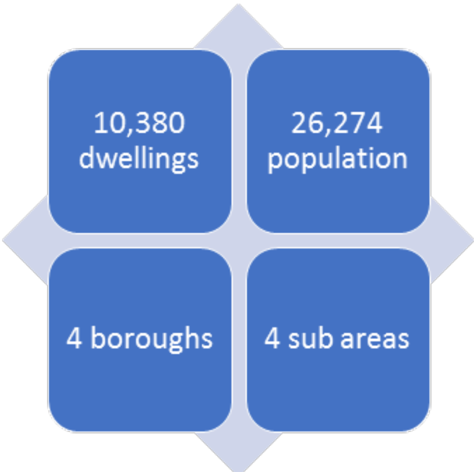
1. INTRODUCTION

This background paper draws together some of the key information available to set out the profile and context of the London Legacy Development Corporation (Legacy Corporation) area. This should be read in conjunction with the **Population Review Report (2018)** which draws out some major features and datasets for the area as well as the 2014 version of the **Spatial Portrait Background Paper (2014)** which includes information on the history of the area and the context of the Legacy Corporation.

For the purposes of clarification, it sets out the methodology, key inputs and assumptions into the population projections and highlights some key changes from the information available at 2014. Unless otherwise stated the source of the information is the Legacy Corporation's Household Survey (2017) which results fed into the Population Review Report.

2. KEY FACTS AS AT 2017



The Legacy Corporation area falls partly within the boroughs listed below:

- London Borough of Hackney
- London Borough of Newham
- London Borough of Tower Hamlets
- London Borough of Waltham Forest.

The Legacy Corporation's Local Plan divides the area into four main Sub Areas, as follows:

- Sub Area 1 – Hackney Wick and Fish Island
- Sub Area 2 – North Stratford and Eton Manor
- Sub Area 3 – Central Stratford and southern Queen Elizabeth Olympic Park (QEOP), and
- Sub Area 4 – Bromley-by-Bow, Pudding Mill, Sugar House Land and Mill Meads.

3. PROFILE OF THE LEGACY CORPORATION AREA

As the Legacy Corporation area does not correspond directly with any other administrative boundary such as ward or super-output area, in support of the adopted Local Plan (2015) (Adopted Local Plan), the usual sources of data were not available. Therefore, the Legacy Corporation had to rely on ward and local authority level data to assess the likely characteristics and it was not possible to determine precise local housing requirements for the area, nor determine local variations to housing size and mix requirements. However as London is one Housing Market Area, the Greater London SHMA and a review of the respective SHMAs of the growth boroughs were utilised in support of housing policies and this approach was supported by the Local Plan Inspector.

The initial Greater London Authority (GLA) projections developed in support of the Adopted Local Plan were based on uplifted delivery rates for the opportunity area plus the population generated by the Stratford City and Legacy Communities Scheme permissions. This predicted that the population would be just over 10,000 but would rise to approximately 55,000 at the end of the Adopted Local Plan period of 2031. This was prior to receipt of the current independent housing target of 1,471 per annum therefore these figures were not specifically linked to local housing capacity. Therefore it is no longer possible to utilise these figures.

Additionally, at this time as the population was relatively low it was reasonable to expect the population to reflect that of the local community however since this time there has been considerable growth with over 6,500 units being completed since 2012, presenting a potentially very different household profile to previously. The Legacy Corporation had already committed to a review of the Local Plan and recognised the potential issues it faced so commissioned a full Household Survey which took place in Summer 2017 and results fed into new population projects. The **Population Review Report 2018** sets out the full results of this.

3.1 POPULATION PROJECTIONS

The population projections are a key input into the Local Plan review process, broadly setting out that the population is anticipated to grow to around 109,000 by 2036. These assumptions have been fed into all evidence base documents but most notably:

- **Combined Economy Study (2018)**: Part Ai Economy Study and Employment Land Review and Part B Retail and Town Centre Needs Assessment
- **Housing Requirements Study (2018)**
- **Infrastructure Delivery Plan (2018)**
- **Open Space and Play Assessment (2018)**
- **Schools Study (2018)**

As this study plays such a key role in the Legacy Corporations' evidence base it is considered prudent to set out the key sources of this information and what assumptions have been taken into account when drawing these conclusions.

3.2 KEY INPUTS AND ASSUMPTIONS

The key inputs into the population projections were:

- Information from the current development pipeline showing size, mix, location and quantum.
- Survey data from the Household Survey with detailed information on household profiles, moving habits and

assumption and aspirations for the future. As this survey was carried out in parallel with the University of London's Institute for Global Prosperity there is some unique information available for some parts of the area which has enabled the Legacy Corporation to further develop its understanding of the impacts of regeneration.

- The **London Strategic Housing Land Availability Assessment (2017)** provides a phased breakdown of potential housing capacity which was broken down by sub area
- GLA growth scenarios

The consultants carrying out the population survey were also responsible for the Housing Requirements Study and have extensive experience in conducting surveys, demography and producing housing studies, therefore the assumptions made within the population projections are based upon their extensive knowledge and experience. A number of key assumptions were made in relation to the amount of Private Rented Sector/Build To Rent units which is a relatively new tenure to the area; it was assumed that the occupants of these forms of accommodation were to have similar moving patterns to other private rented accommodation, however it is acknowledged that the role of this tenure is to provide longer-term availability for tenants.

Due to the different scopes of the Population Report and the Housing Requirements Study they have slightly different assumptions when it comes to student only households. The Population Report includes all the population of the area, including over 2,000 students currently residing within the area with a projection for growth in student accommodation as a part of the additional housing supply. Whereas the calculations within the Housing Requirements Study exclude student only households as they are not considered as a permanent part of the housing market with different needs and requirements. This accounts for some differences in figures between the reports and is part of standard methodologies.

4. KEY CHANGES SINCE 2014

4.1 DEMOGRAPHICS

The **Population Review Report (2018)** projections indicate that the Legacy Corporation area is a fast-growing area with the estimate population of 26,274 in 2017. This is an increase of 16,001 from 2014 when the estimated population within the area was 10,273. Similarly, the total number of occupied households has increased from 4,533 in 2014 to 10,380 in 2017.

Table 1: Population

Year	Total Population	An increase of total population from 2014 base (%)	Number of Occupied Households	An increase of occupied Households (%)
2014	10,273		4,533	
2017	26,274	155,76	10,380	128.98

Source: ONS 2011 Census Data and the Legacy Corporation Household Survey (2017)

Sub Area 3 has the largest population amounting to a third of the total Legacy Corporation area (35.9%). The second largest is Sub Area 2 with 30.5% of total population; while Sub Areas 1 and 4 have somewhat smaller populations of 16.3 and 16.2% respectively.

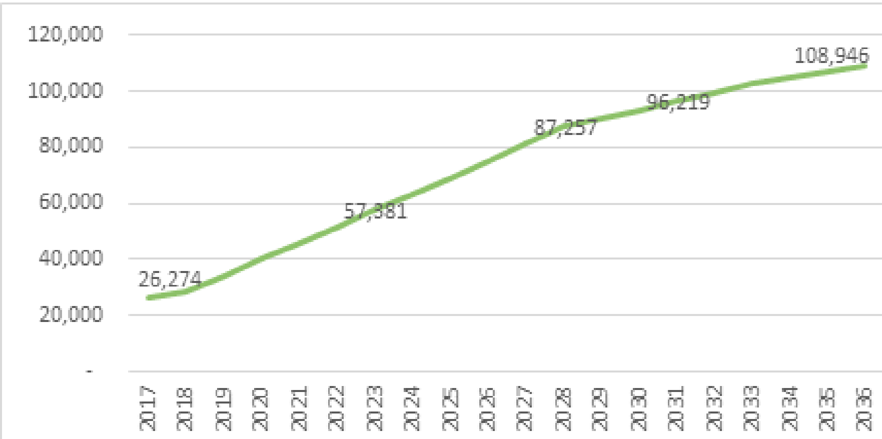
Table 2: Sub Area population

Sub Area	All residents	Percent of all residents
Sub Area 1	4,750	18.0
Sub Area 2	8,005	30.5
Sub Area 3	9,447	35.9
Sub Area 4	4,073	15.5
Total	26,275	100

Projected Population Growth

With the series of planned development projects across the area which have planning permission, and increased housing targets, the Legacy Corporation area is forecast to undergo significant change over the lifetime of the Revised Local Plan. As shown in Figure 1 the area's population is expected to increase rapidly over the plan period up to 96,219 in 2031, and around 108,000 by 2036.

Figure 1: Estimated Population growth to 2036



Current demographic profile

The age profile of the current population is set out in Figure 2. The population of the area is relatively young with over 60% being under 34 and only 4% over 65. As in 2014, a peak in current population is within the 20 to 35 age-bands. The Legacy Corporation has a higher proportion of young adults aged 25-34 (33%) than London and the rest of the country (17% and 14% respectively).

Some 7% of the population is aged between 50 and 64, while only around 4% of the population is in their retirement age (65+) both of which are lower than the averages for London and the country as a whole. At a Sub Area level, Sub Area 1 has somewhat fewer 'young adults' aged 16 to 34, and more children aged under 16 and adults aged 35+. The three remaining sub-areas have a generally more consistent age structure, with at least half of their residents falling within the 16 to 34 age group.

The survey also found that 25% of households in the area contain children and within Sub Areas 1 and 2 this amounts to around a third of households

Figure 2: Current Estimated Distribution by age

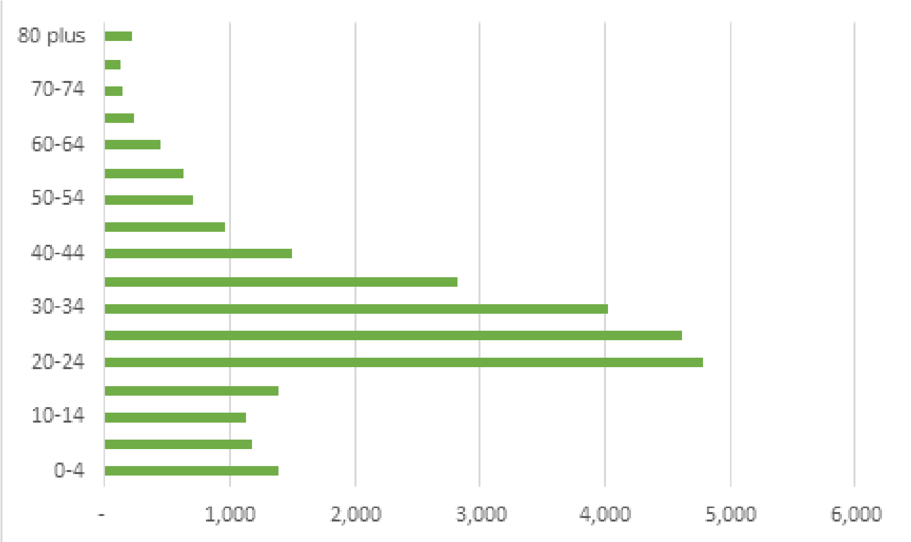
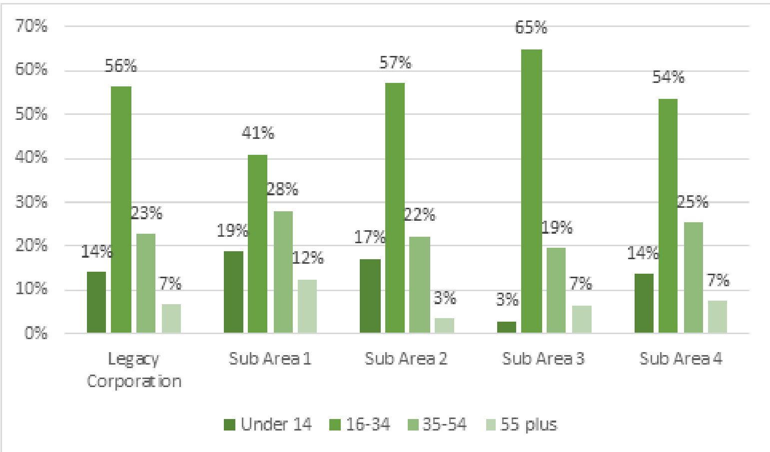


Figure 3: Current estimated distribution by age and sub area



Diversity

The Household Survey (2017) found that 31% of the population fall within the White British group, followed by White Other at 20%. Asian or Asian British: Chinese (8%) and Black or Black British African (8%) formed the next highest proportioned groups. At a Sub Area level, Sub Area 1 has the highest percentage of White groups at 66%, and Sub Area 2 the lower percentage, at 41%.

Figure 4: Ethnic group of Legacy Corporation area

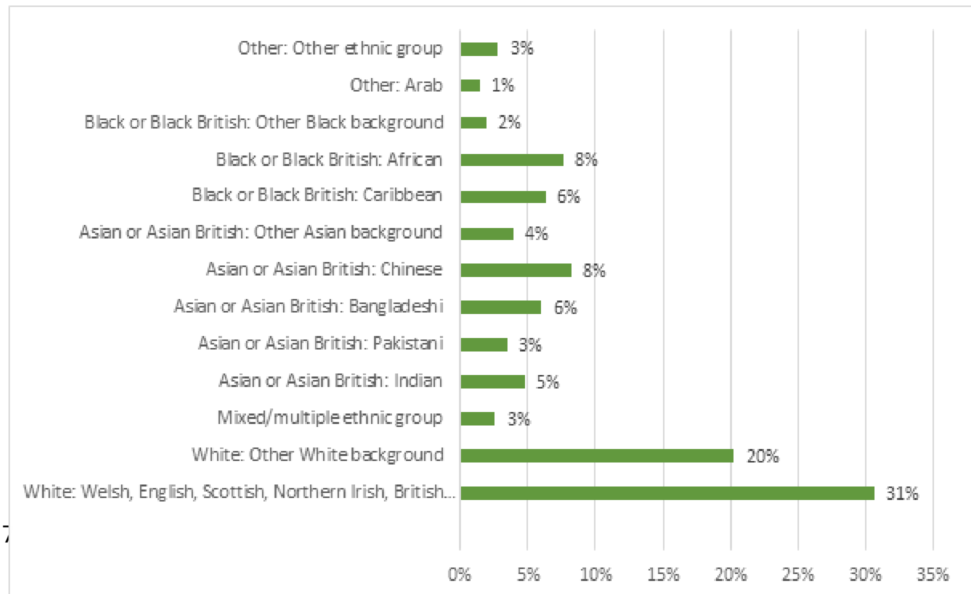


Figure 5: Ethnicity by Sub Area

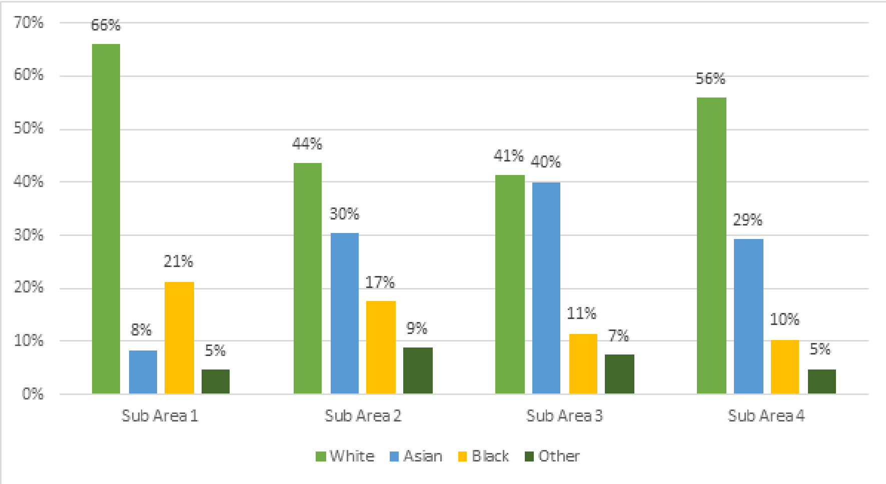
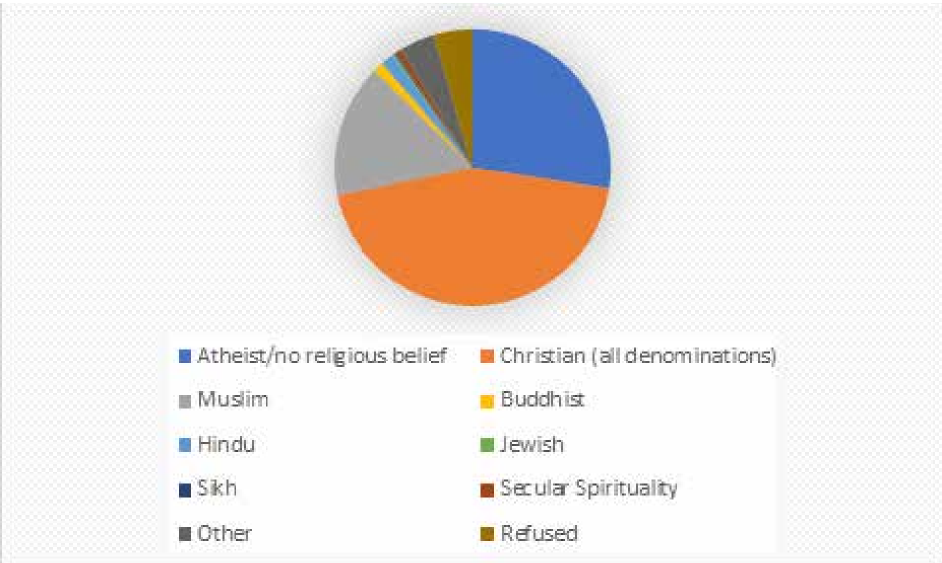


Figure 6 shows that Christianity is the most prevalent religion within the area at 44% whereas 27% of residents declared as being Atheist or have no religion, and the third largest at 16% is Muslim.

Figure 6: Religion



4.2 BUSINESS GROWTH, JOBS, HIGHER EDUCATION AND TRAINING

The changes to the economic profile of the Legacy Corporation area can be seen by a 51% increase in the overall employment rate between 2011 and 2016 (Legacy Corporation Combined Economy Study 2017). Figure 7 shows the largest proportion of all residents (57%) within the area are full-time employed with 8% in part-time employment and only 2% unemployed. The unemployment rate is below the four boroughs and London as a whole. A high proportion of the economically inactive population are students, which is consistent with the younger age profile of the area. This is an improvement on the baseline of 2014 where between 57 and 70% were in employment within the four boroughs, showing some of the effects of convergence. The highest proportion of full-time employed residents is within Sub Area 4 and somewhat lower in other Sub Areas, as shown in Figure

Table 3: Economic activity by gender

	Full time employee (31 hours or more per week)	Part-time employee (less than 31 hours per week)	Self-employed	Retired from paid work	Full-time student	Looking after home/ family	Otherwise not working
Male	64%	5%	4%	3%	17%	1%	3%
Female	42%	8%	3%	4%	25%	13%	4%

8. Table 3 shows that females are more likely to be unemployed or looking after home or family than males.

Figure 7: Economic activity by borough

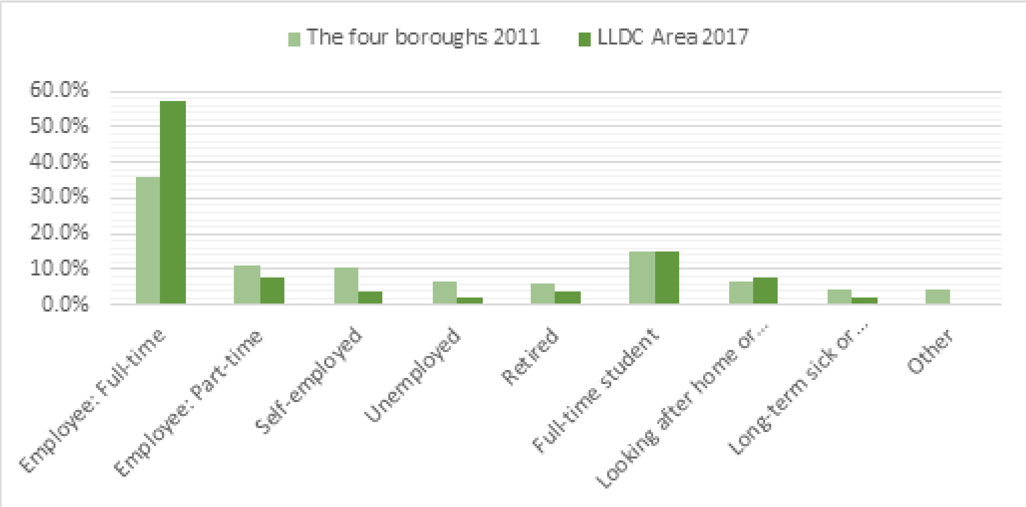


Figure 8: Employment per sub area

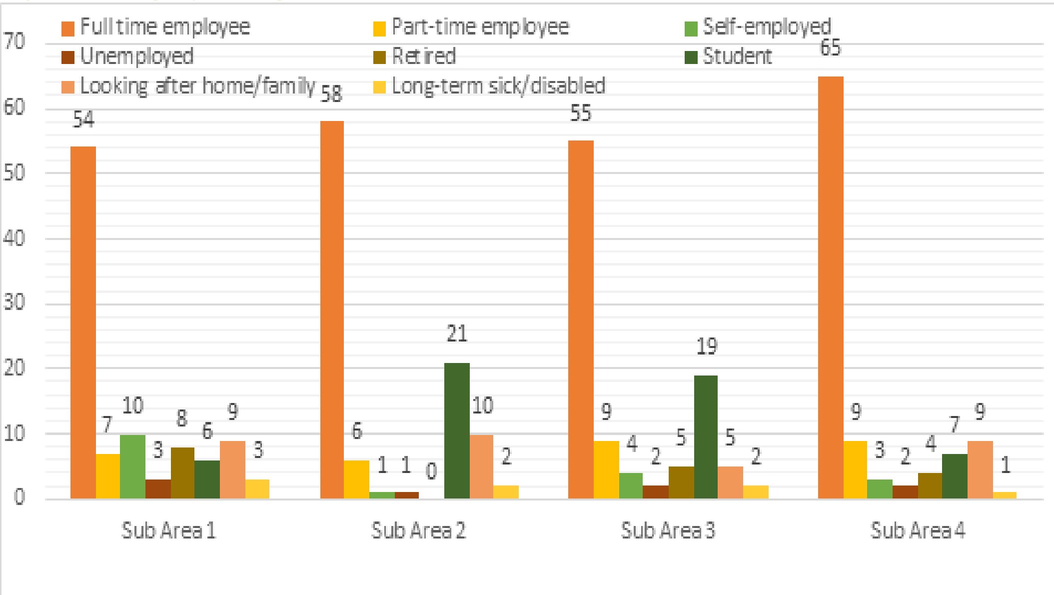


Figure 9 shows the proportion of those within each ethnic group against economic activity for the working age population. Black and Other ethnic groups had the highest proportions of aged 16 – 64 who were unemployed.

The LLDC area has seen some changes in the employment profile. Figure 10 shows that residents of the area are more likely to work in professional occupations at almost 50% than within the four boroughs as a whole. This is a significant change from the baseline of 2014 where around 23% of the four boroughs worked in professional occupations which was also below the London average of 25%.

Figure 9: Professional groups

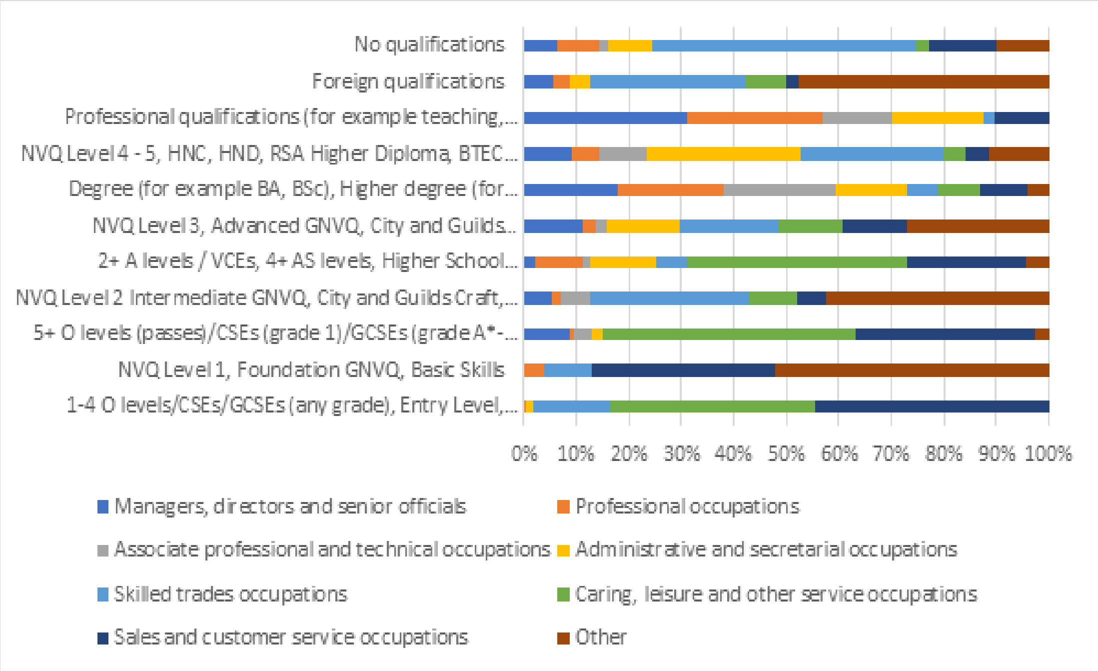
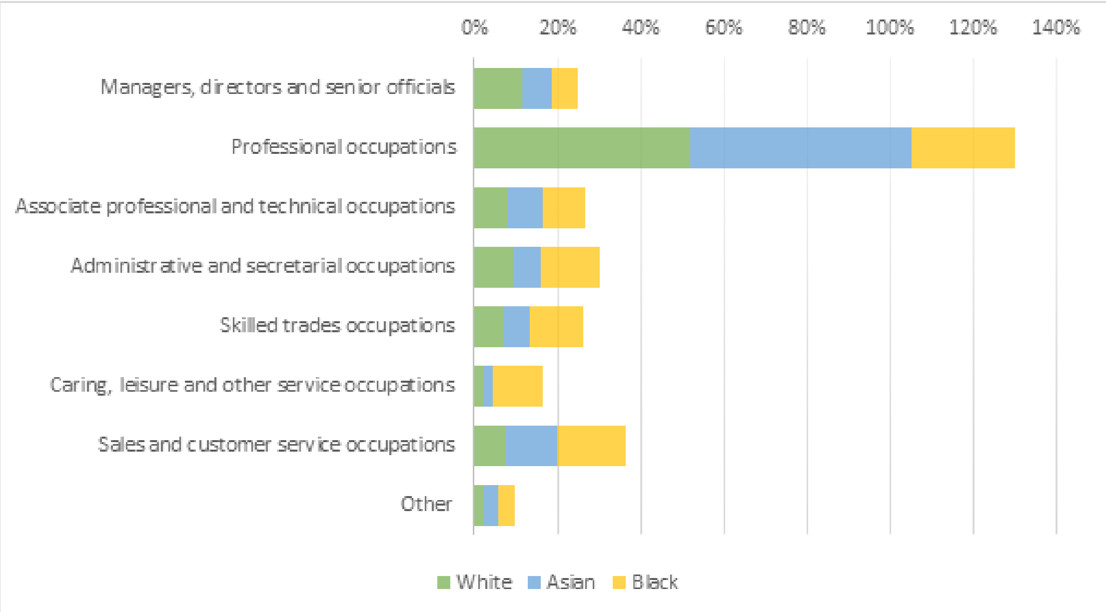


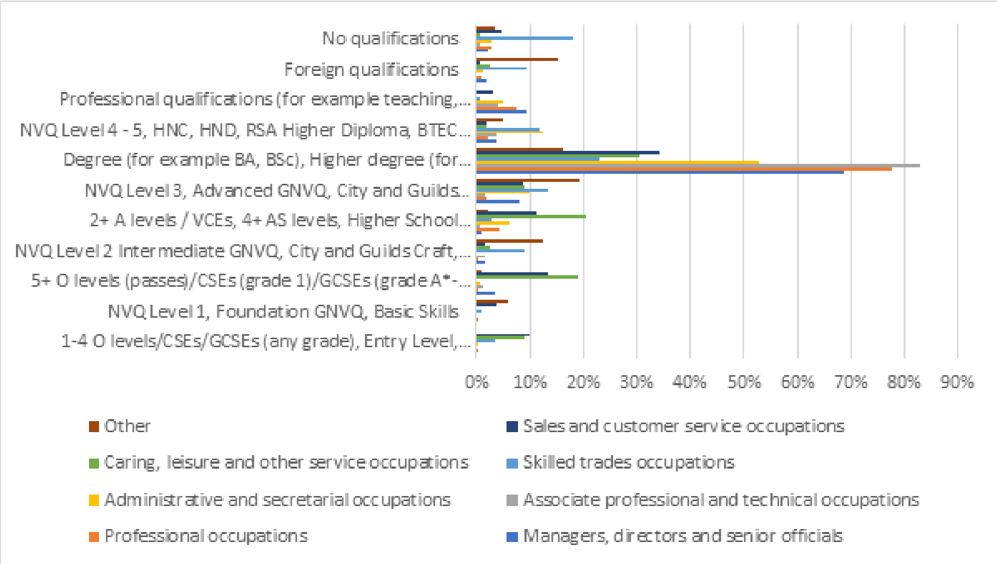
Figure 10 shows that, within the area, residents from Black ethnic groups are less likely to be employed in professional occupations and more likely in sales, leisure or similar sectors.

Figure 10 Occupation by ethnic group-



As Figure 11 shows, the Professional Occupations tend to employ a high proportion of highly qualified individuals. For example, almost 78% per cent of jobs in professional occupations are held by people educated to higher degree level.

Figure 11: Occupation and qualifications



4.3 EDUCATION

In terms of the qualifications, the residents of Legacy Corporation area, Figure 12 shows that 57% of the adult population of the Legacy Corporation area has a qualification equivalent to a university degree, outperforming London (40.5%) and England (29.8%). This is also higher that the four boroughs. Only around 7% of the population have no qualifications compared to around 20% within the area at the time of the 2011 Census.

Figure 12 – Education

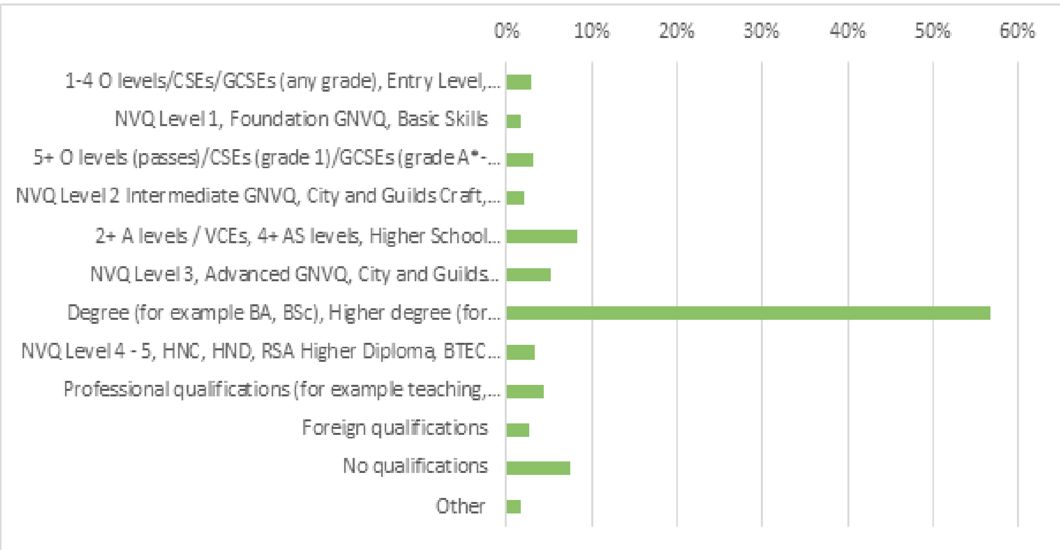
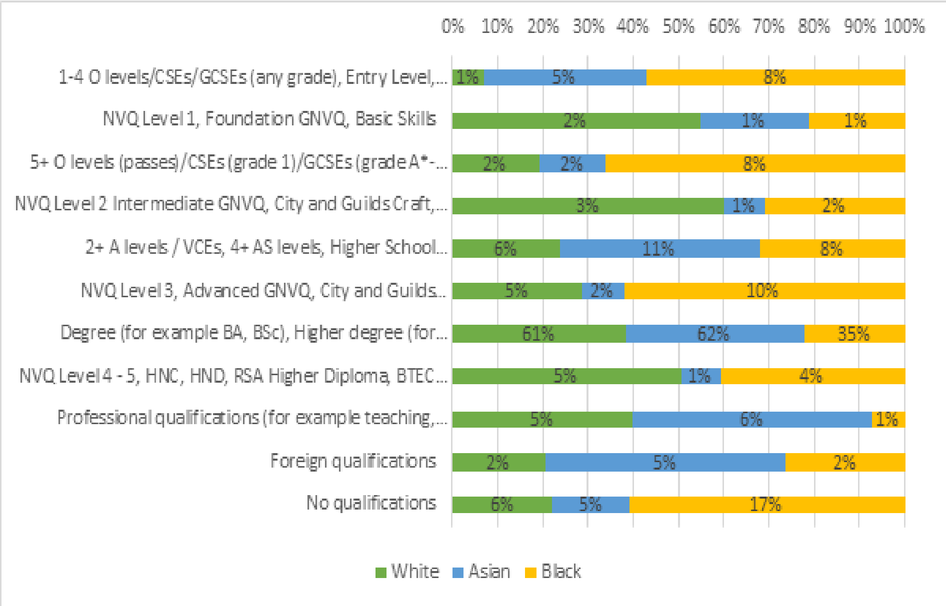


Figure 13 shows that Black ethnic groups had the lowest education level with only 8% holding degrees in comparison to White and Asian (61% and 62% respectively).

Figure 13: Qualifications by ethnic group



4.4 EARNINGS

A breakdown of the average household income per sub area and constituent borough is shown in Figure 14. Within the LLDC area, 37% of households have incomes over £50k, ranging from 25% in Sub Area 1 to 50% in Sub Area 2. Table 4 shows that male workers earn more than female workers (12% of female are paid £13499 (annually) or less, in comparison to 7% of male population; while 20% of male population earn £75000 (annually) and only 11% female).

Figure 14 – Income

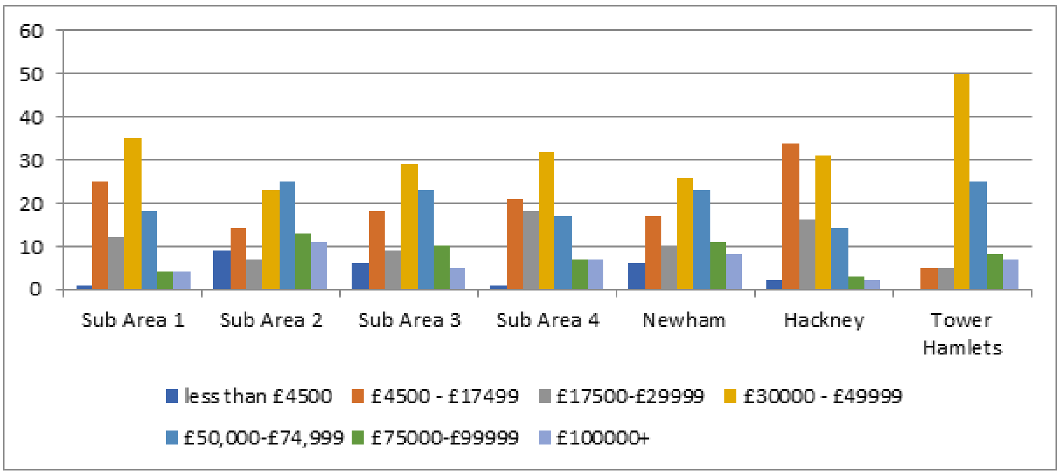


Table 4 – Income and gender

	£13499 or less	£13500-£29999	£30000-£49999	£50000-£74999	£75000 or more
Male	7%	14%	29%	23%	20%
Female	12%	18%	27%	19%	11%

4.5 HEALTH

A significant proportion of the population reported to have very good health (91%) whereas 3% described their health as bad and 1% as very bad, lower than as London as a whole (5.4%). This is an improvement on the 2014 baseline where around 82% described their health as good or very good, showing some progress towards the convergence health aims. 5% of residents reported that they have a long-term health problem or disability that limits their day-to-day activities; this is lower compared to both London (14.1%) and England & Wales average (17.9%). 2% need use of wheelchair, 18% of 65 and over. (See Figures 15 and 16). As shown in Figure 17, the data show no significant ethnic inequalities in health.

Figure 15: Health of residents

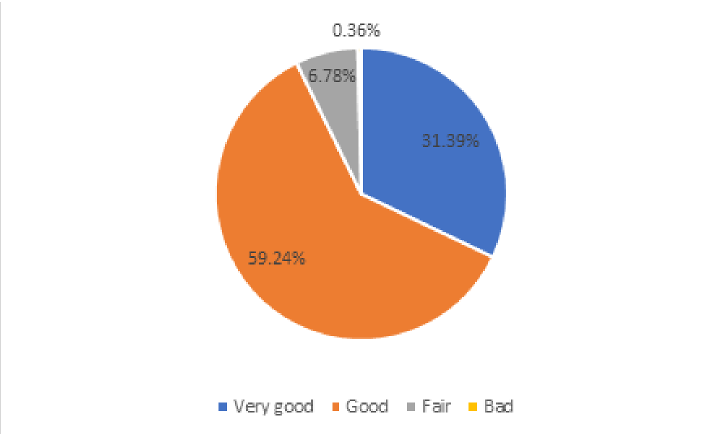


Figure 16: The percentage of working age residents suffering from disability

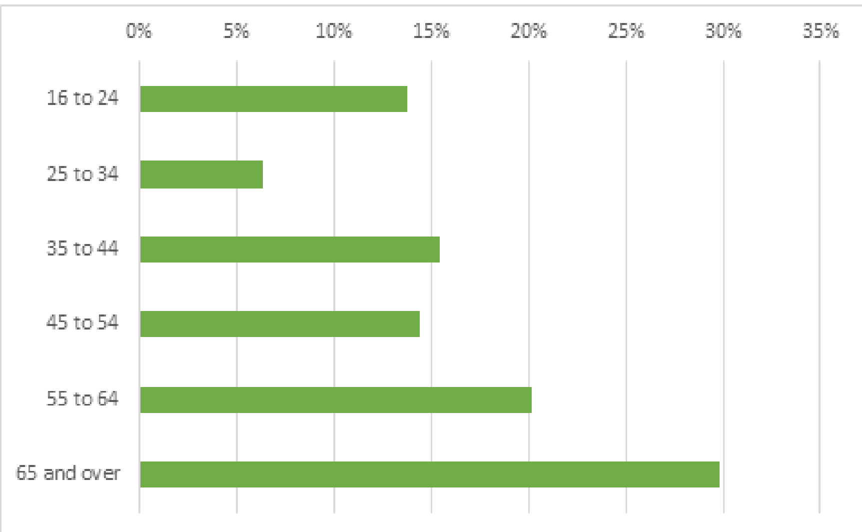
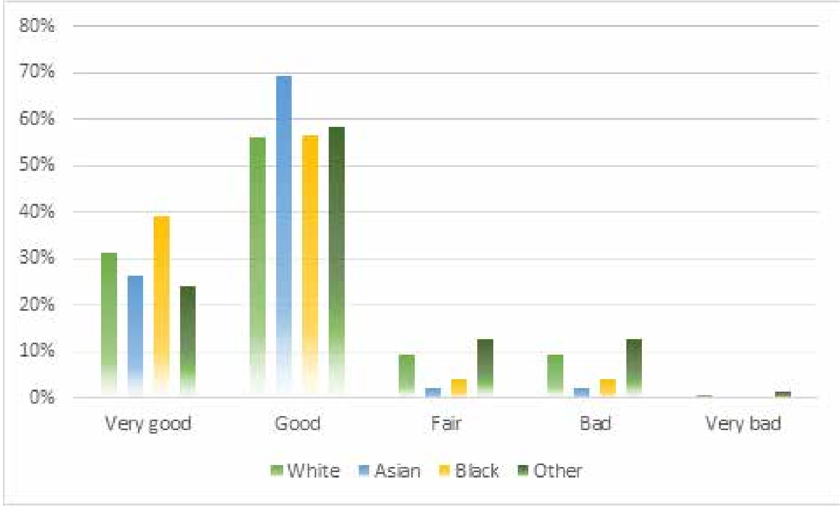


Figure 17: Health by Ethnicity



4.6 HOUSING

Table 5 shows that 53% of all households rent privately, 19% owner occupied and 27% Social/Affordable rent. Levels of private rent vary considerably between sub-areas, highest being in Sub Area 2 (63%) and the lowers 33% in Sub-Area 1. However, Sub Area 1 has the highest level of social rent and owner tenures.

Table 5: Tenure

Tenure	Number households	Percentage
Own outright	587	5.7%
Own with a mortgage	890	8.6%
Part owns and part rents (shared ownership)	515	5.0%
Rents from Private Landlord	5,576	53.7%
Rents from Council	1,035	10.0%
Rents from a Housing Association or another RSL	1,777	17.1%
Total	10,380	100.00%

4.7 ENVIRONMENT AND BUILT FORM

The Legacy Corporation's area is diverse with housing and mixed use developments, significant retail and commercial floorspace and industrial sites sitting alongside large expanses of open space, playspace, sports facilities, waterways and infrastructure.

The Legacy Corporation continues to be the beneficiary of a significant amount of open space, including the parkland of the Queen Elizabeth Olympic Park, the Lee Valley Regional Park and other local open spaces delivered throughout the major developments that have taken place since 2014. Pockets of wild parkland exist within Queen Elizabeth Olympic Park and across the area and in places open spaces border the waterways. There are a number of existing play spaces and two sports pitches in the area as well as approximately 100 hectares of Local Open Space (LOS) in over 47 locations, each space with an individual character and function. The adopted Policies Map designates open spaces within the area to be protected over the Local Plan period. These open spaces have been reviewed and, in some cases, updated based on the Open Space and Play Space Assessment (2018).

The **Open Space and Play Space Assessment (2018)** identified an additional five open spaces that do not currently have any designation but fulfil the Local Green Space designation criteria set out in the National Planning Policy Framework. The assessment concluded that these open spaces should be designated as additional Local Open Spaces (LOS) through the Local Plan review. These new open spaces have been designated as LOS and included in the Revised Polices Map accordingly.

The Legacy Corporation is also fortunate to have information on the usage of open space through the Household Survey. Figure 18 below shows that the Queen Elizabeth Olympic Park is the most frequently used open space in the area, followed by the Victoria Park.

Figure 18: Use of local opens spaces and parks

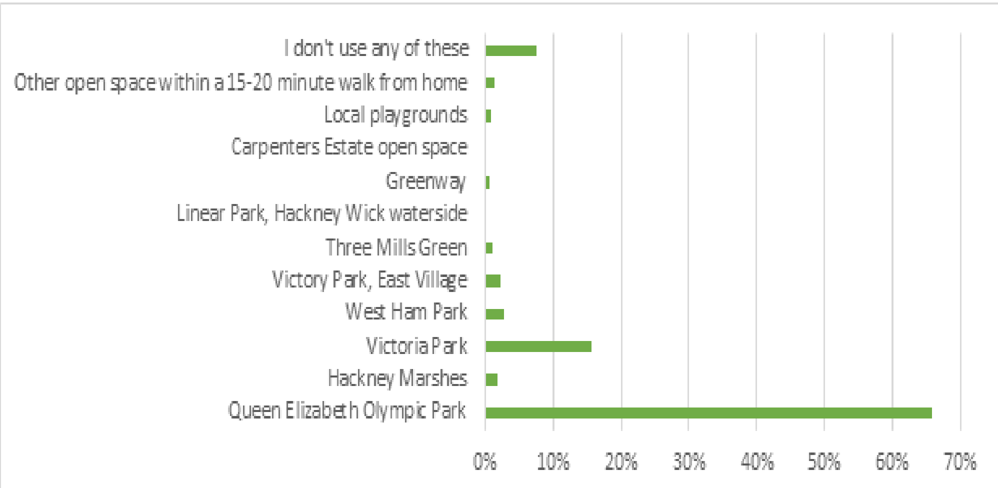


Table 6: Venue usage

Venue	Residents' usage
Facilities within QEOP (Aquatics, Copperbox, Velopark, LV Hockey & Tennis Centre)	13%
Gymbox Westfield	5%
Better Gym East Village	10%
Hackney Marshes Leisure Centre	1%
Other local sports facility	7%
Other sports facility in London	5%
None	58%

Across Legacy Corporation area as a whole, a majority (91%) of residents are satisfied with the open spaces and parks in their area, with around three fifths (61%) being very satisfied. Only 3% of residents report being dissatisfied with the open spaces and parks. Satisfaction is highest in Sub Area 2 (97%) and lowest in Sub Areas 1 and 4 (both 86%). Although satisfaction is high in all demographic sub-groups it was noticed that the residents with the lower income (£13,000-£29,999) and those with children are somewhat less satisfied then average (82% and 86% respectively).

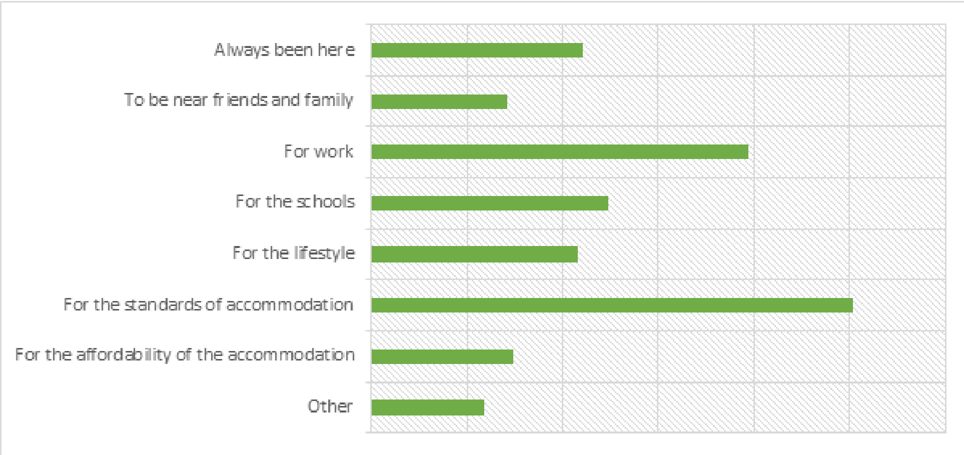
Much of the Legacy Corporation's area bears the legacy of the 2012 Olympic and Paralympic Games with high-quality sports facilities, events and community space. Queen Elizabeth Olympic Park contains large scale and high-profile sports, community and leisure developments of the Stadium, London Aquatics Centre, the Lee Valley Hockey and Tennis Centre and the VeloPark. Table 6 shows the use of these facilities by residents. As it can be observed from Table 6, 58% of residents do not use indoor facilities for sports, physical activity or other forms of exercise. Of those who use sports facilities, the facilities within the Queen Elizabeth Olympic Park (QEOP) are the most frequently used (13%), followed by a gym within the East Village; only 5% of residents use sports indoor facilities outside the area.

There are four Conservation Areas which fall within the Legacy Corporation area: Hackney Wick, Fish Island and White Post Lane, Sugar House Lane, and Three Mills, plus a small part of the St John's conservation area. Most of the Legacy Corporation's area is covered by Archaeological Protection Areas, established on the advice of English Heritage. This means that the area may contain archaeological remains that require protection, so assessment or a field evaluation is a requirement for applications within most of the area.

The majority (93%) of residents, within the area as a whole are satisfied with their local area as a place to live, with more than half (58%) being very satisfied. Only 3% of residents reported being dissatisfied with their local area. Although satisfaction is high in all Sub Areas, it varies from 88% in Sub Area 1 to 97% in Sub Area 2. Although satisfaction is relatively high, people with disabilities shows lower levels of satisfaction with their local area (78%).

Over 88% of residents rather their accommodation to be good or very good, only 2% as poor. As it can also be observed from Figure 19 below, the main reason why people move to the Legacy Corporation is for the standard of the accommodation or to be close to work.

Figure 19: Reasons for move to Legacy Corporation area



4.8 INFRASTRUCTURE

The area benefits from excellent public transport infrastructure with PTAL levels of up to 6b in the vicinity of Stratford Station, with high-speed, regional, Overground, underground and DLR services as well bus services. The area also benefits from a heat network focussed around Queen Elizabeth Olympic Park and Westfield Stratford City.

There is a wide range social and community infrastructure within the Legacy Corporation area with further facilities planned, the area includes schools, health centres, and faith, community and sports facilities.

As shown within Figure 20 below around 60% of the population utilise public transport as their main means of travel to work or study which is testament of the high levels of accessibility within the area. It was also found that only around a quarter of households within the area own a car and only 19% of those use this for travel to work or study.

Figure 20 Mode of travel to work