



insight

The Research Bulletin for London West

Welcome

'Insight' is the new research bulletin from London West Learning and Skills Council (LSC), which will be produced on a quarterly basis. The aim of 'Insight' is to give a snapshot of the London West area, in terms of education and labour market information, with regular updates on current research. Over the coming months, 'Insight' will focus on a number of issues, for example education and achievement, employment, unemployment and skills.

Each edition of 'Insight' will include either a borough profile (focusing on a particular borough in London West) or a sector profile (focusing on a key industry in the area). This edition includes a borough profile for Ealing. The bulletin will also include details of findings from current research projects which London West LSC has commissioned. The next edition of 'Insight' will include further information from the 2001 Population Census and a sector profile.

Overview of the London West LSC Area

- The London West Learning and Skills Council area comprises the boroughs of Ealing, Hounslow, Hillingdon, Hammersmith & Fulham, Brent and Harrow.
- Results from the 2001 Population Census show that the total resident population in the London West LSC area is 1,391,815, of whom 49% are from an ethnic minority.
- In total, there are 553,201 households in the London West area. Ealing has the highest population of all the boroughs (300,948) and Hammersmith and Fulham has the lowest (165,242).
- Two London boroughs, Newham (in east London) and Brent, had more Black and Asian people than white people for the first time ever. In Brent, white people made up 45.3% of the population, whilst 18.5% were Indian and a further 18.3% were either Black Caribbean or Black African.
- In Summer 2002, there were approximately 712,000 employees in the London West LSC area, of whom 83,000 were self-employed.
- Heathrow Airport is London West's largest economic node. As a major generator of wealth and employment, Heathrow employs around 82,000 people directly or indirectly. Work has begun on building Terminal 5 at Heathrow and large scale recruitment is now underway. The workforce is expected to peak at some 4,000 by 2005 and will be extensive at least until 2008.
- Wembley, and in particular Wembley Stadium, is London West's other globally recognised brand. Plans for a new national stadium in Wembley are now going ahead. The developments at Wembley and Heathrow will provide considerable employment in the construction sector, and will bring many more jobs & industries into the region.

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Introduction

On March 26th 2001, the Learning and Skills Council (LSC) was launched, taking on the responsibilities for post 16 education previously fulfilled by Training and Enterprise Councils and the Further Education Funding Council. In 2002, the LSC also took on responsibility for school sixth forms. With the headquarters in Coventry, the LSC is a national non-governmental body with 47 local offices, including London West.

The London West area has one of the most diverse populations in the country and includes areas of great affluence as well as pockets of severe deprivation. To widen participation in learning across the whole community is a key element of the LSC remit, and promoting social inclusion is one of its main priorities.

Findings from Research Projects

Through a process of consultation, London West LSC identified and commissioned four research projects to give us the information we needed to plan and fund enhanced provision for previously under-represented groups in education and training. The four projects explored the positions of:

- young people with specific disabilities
- residents of deprived housing estates
- lone parents
- young people at risk of re-offending.

Although the research projects concentrated on what could broadly be described as "excluded learners", we had to look at where there were common themes emerging from the research findings and where the outcomes were unique to the particular groups. This would help in considering how London West LSC could best intervene to offer greater access to learning and skills.

Information is the Key

Paucity of information was a subject that arose many times during the research. It was a major barrier to learning for young people with disabilities because we did not have sufficient detail of the number or situation of those young people, particularly after the age of 19. In the case of young offenders, there was no tracking system across borough boundaries that could monitor their progress, with, again, a greater deficiency for those over 18 years old. Employers and learning providers did not necessarily know who, among their staff or students, were lone parents and, therefore, whether there was a need for a particular type of support.

On the other side of the equation, the respondents, themselves, often did not know how or where to access learning. This was an acute problem for the estate residents but was also apparent in the research on lone parents and people with disabilities. A principal difficulty for young offenders was that their availability frequently did not coincide with college terms.

Appropriate and affordable childcare was a pivotal issue for lone parents and was also significant for estate residents. Moreover, it was linked to the wider question of more flexible working arrangements and family-friendly policies. Transport – especially for people with disabilities and for estate residents – was a related problem. Even where assistance was available, there was a general feeling that it was not promoted to the very people who could benefit.

Lack of basic skills was an evident barrier to further learning for many of these groups and this is an existing priority for London West LSC. Conversely, some of the lone parents were highly qualified but there was insufficient information to link these skills to gaps and shortages in the labour market. Whilst basic skills were a feature of the research into young offenders, some had higher levels of attainment than we might have expected.

Considering Change

The research has identified areas where short-term improvements are possible. The scope of these projects was limited but the continuing need for detailed information is an issue that was repeatedly emphasised. A greater degree of collaborative working across agencies and local authority boundaries would also appear to be a vital element in the process of raising participation and achievement.

Finally, there is the more nebulous concept of flexibility. Where existing patterns of education and employment are not appropriate for certain members of the community, then we might have to look at changing those patterns rather than requiring individuals to conform. It is a big subject but, with an increasingly diverse and fragmented society, it is a challenge that is unlikely to go away.



In more detail, the research projects were¹:

Education Experiences of Young People at Risk of Re-Offending – carried out by Ecotec.

This research aimed to gain an overview of the numbers, locations, needs and attitudes of young offenders in London West and to explore the quality of custodial and post-custodial education. In addition to the data gathered to fulfil the first objective of the project, the researchers interviewed 36 juveniles and 31 offenders aged 18 to 21 across London West. This was supplemented by interviews with YOT (Youth Offending Team) workers, training providers, careers advisers and employers. There was also a case study at Feltham Young Offenders Institution.

As well as the common themes from the projects described above, some of the more specific outcomes emanating from the research included the unrealistic employment expectations of the young people and – somewhat ironically in terms of that – the lack of encouragement given by employers in the area and the absence of policies governing the employment of ex-offenders.

Estate Based Research – carried out by WM Enterprise.

An examination of the employment and learning experiences of residents in six deprived housing estates in London West. A further key objective of the research was to look at the linkages with the estates and neighbouring centres of employment growth and identifying any mismatches between the employers' demand for skills against those offered by the residents. The researchers conducted a household survey of 700 residents, held focus group meetings on the estates, surveyed 66 employers and interviewed local agencies and organisations.

The researchers found levels of ill health and under-employment that were significantly above average for the area, whilst income levels were markedly below. The outlook for economic growth was good, with employers anticipating a need for managerial, professional, technical and administrative staff and machine operatives. Improvements in basic skills and language skills were among the fundamental requirements for the residents.

Service and Support Needs for Young People with Disabilities – carried out by Research for Tomorrow, Today.

The research concentrated on young people aged between 16 and 24 with either Autistic Spectrum Disorders (ASD) or Profound and Multiple Learning Difficulties (PMLD). A literature search determined current thinking and best practice, while calculations on prevalence figures were used to estimate the likely baseline data. Interviews were conducted with professionals and with parents and carers of the young people.

Problems with misdiagnosis meant that many people with ASD and PMLD have been lost to the system. The importance, therefore, of trained specialist advisers for this group cannot be overstated and the need for a range of provision to match the range for non-disabled learners is paramount. Both carers and parents wanted to see a redefinition of learning, with a greater emphasis on non-academic subjects to provide access to life and learning before more specific skill development. The report advocated greater publicity and promotion to encourage awareness and involvement, particularly from target groups, including minority ethnic communities.

Lone Parent Research – carried out by WM Enterprise

The objective of this research was to collect baseline information on skills; identify support needs; engage local businesses and consider training provision. There were a number of discrete but related elements to the research, including face-to-face interviews with lone parents, a survey of key businesses, focus groups undertaken with local and national organisations, such as Gingerbread and NCOPF (National Council for One Parent Families) and a survey of training providers.

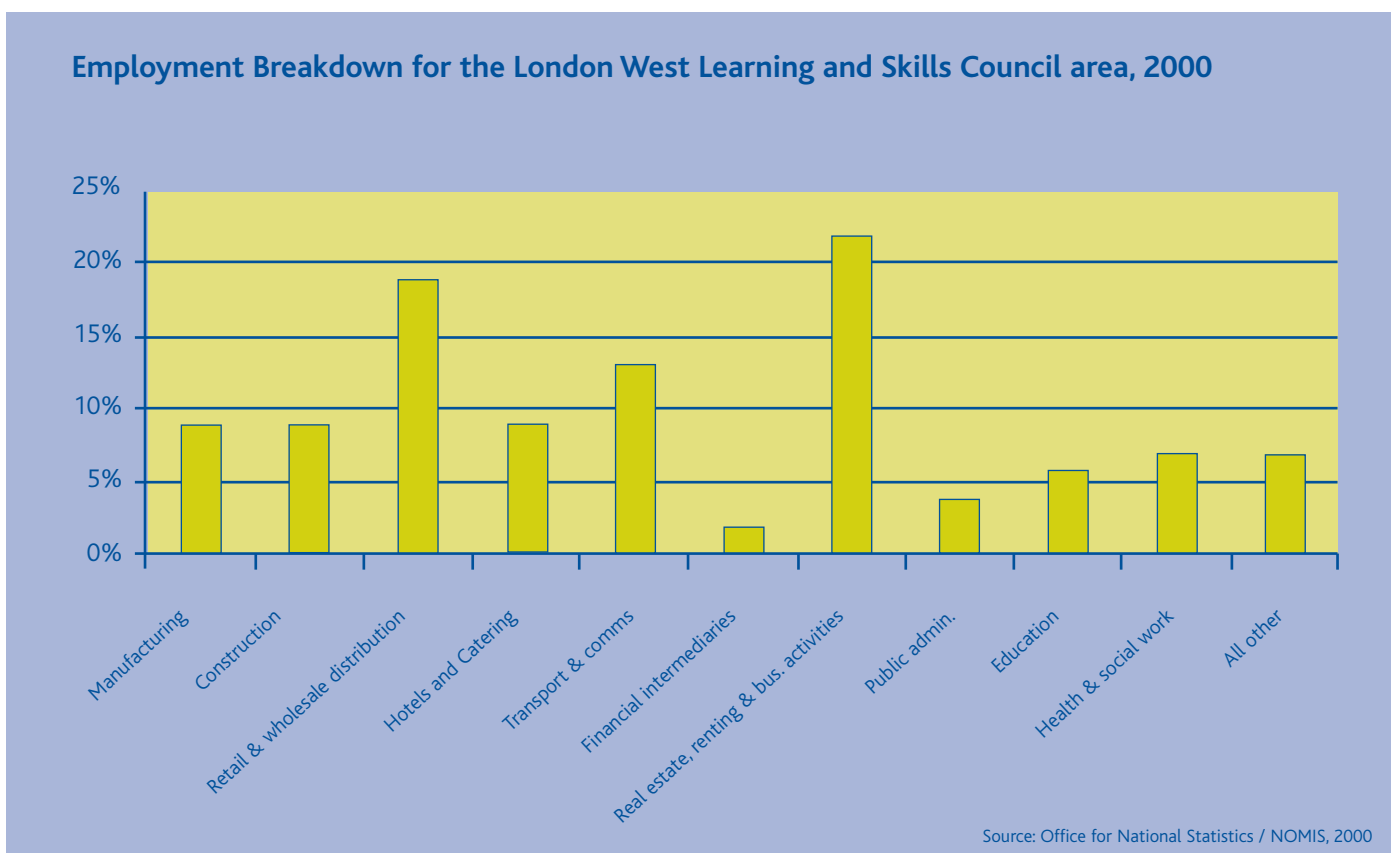
The main recommendations of the report concentrated on the need for increased collaboration across agencies, including London West LSC and the involvement of Early Years Partnerships. Stress was put on the necessity for flexibility and childcare provision and this was exemplified by a recommendation to explore the potential of on-line learning. Culturally specific provision was also cited as a way for minority ethnic communities to engage with mainstream agencies through, for example, the use of community organisations to promote LSC initiatives.

¹ The full reports for these projects will be available on the London West LSC website: www.londonwest.org

Employment and Unemployment: the picture in

Employment

The following chart shows the importance of different industries in London West in terms of the number of employees.



The chart above shows the overwhelming importance of two main sectors in the London West LSC area - real estate, renting and business activities and retail and wholesale distribution. Transport and communications is also an important sector for London West. Between 1995 and 2000, the number of employees in London West increased by 20%, equivalent to approximately 115,200 people. Much of this growth occurred in the real estate, renting and business activities sector, with the number of employees increasing by 39% between 1995 and 2000.

Unemployment

(Please note that following the Boundary Commission Report, from May 2002 ward boundaries and in some cases ward names have changed. The information in this bulletin relates to the previous 1998 ward boundaries).

The number of unemployed claimants in the London West LSC area in September 2002 stood at 28,632 (4%). This is lower than the comparable rate for London (4.6%) but higher than that for Great Britain (3.1%). The majority of unemployed claimants in the London West LSC area (72%) are male. People from some ethnic minorities, particularly people from Black Caribbean backgrounds, are also more likely than average to be unemployed.

The most recent data available for unemployment by age and duration is from July 2002. At this point in time, 36% of claimants had been unemployed for over 6 months, 17% had been unemployed for over a year and 5% of claimants had been unemployed for more than 2 years. 18-24 year-olds accounted for a fifth of all unemployed people in the London West LSC area, compared with a quarter for Great Britain. Those aged 25 and over accounted for 78% of all those unemployed, therefore making up the largest share. It is evident that

n London West

those aged between 25-50 are more likely to experience periods of long-term unemployment than other age groups. For example, of those who are unemployed, 16% of 25-50 year olds have been unemployed for over 12 months, and 5% for over 2 years. Long-term unemployment would appear to be less of a problem for young people (those aged 18-24), as of those unemployed, only 0.7% have been unemployed for over 12 months and none over 2 years.

It is important to acknowledge that unemployment rates have fallen considerably in the London West LSC area over the past ten years. For example, between July 1992 and July 2002, the number of unemployed claimants fell by 48,214. However, the number of unemployed claimants rose sharply, from a low base, between 2001 and 2002. To illustrate this, in August 2001, there were 23,447 unemployed claimants (an unemployment rate of 3.3%). This rose to 28,632 claimants in September 2002 (an unemployment rate of 4%). Noticeably, there are pockets of high unemployment, which are primarily concentrated in the east of the London West LSC area, in the boroughs of Brent and Hammersmith and Fulham.

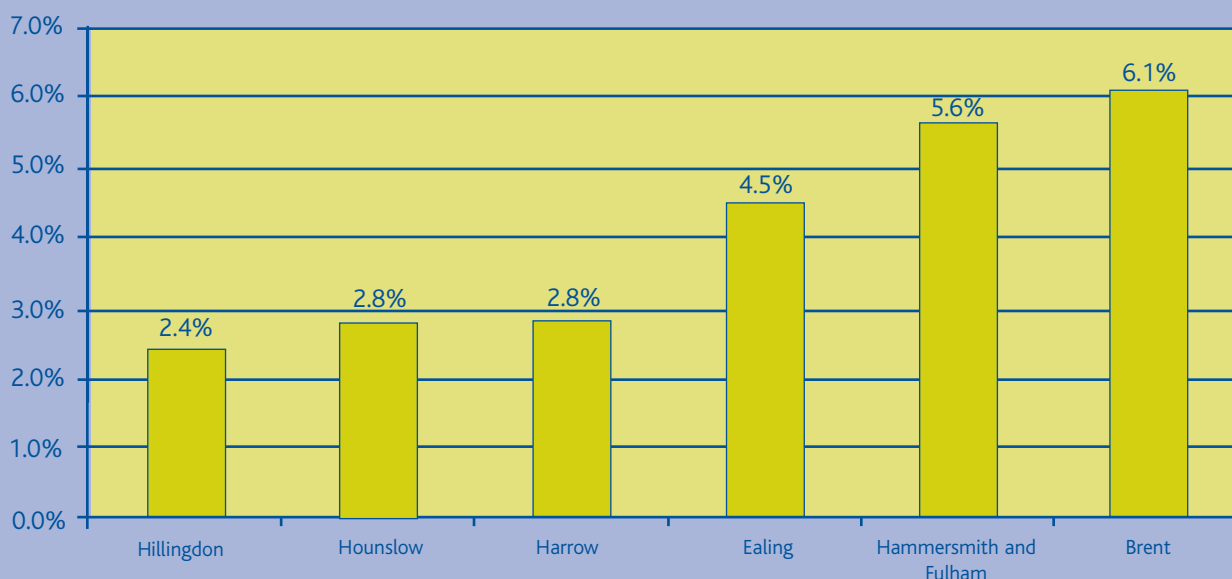
Unemployment rates have continued to rise since September 2001. This may be partly attributed to the events of September 11th and their aftermath. A number of redundancies were made across the country, resulting in job losses for many people, particularly in the tourism industry. To illustrate this, in September 2001, there were 23,560 unemployed claimants in the London West LSC area. This rose to 24,580 in November, and by December there were 25,585 unemployed claimants. At the beginning of 2002, unemployment continued to rise in the London West LSC area, but at a slower rate. For example, there were 26,134 unemployed claimants in January, and by February this figure rose to 26,824, showing less of an increase than previously. However, by September 2002, the number of claimants had climbed further to 28,632.

The following chart shows unemployment rates by borough in the London West LSC area:

As shown in the chart, the boroughs of Brent and Hammersmith & Fulham have the highest levels of unemployment, with 6.1% (8,065 people) and 5.6% (4,639 people) respectively. However, ward unemployment rates in Brent vary considerably, with Carlton having an unemployment rate of 16.7%, the highest of all the wards in the London West LSC area, whilst Kenton, also in Brent, has an unemployment rate of just 2.6%.

It is likely that areas of high unemployment will reflect concentrations of vulnerable groups or otherwise disadvantaged people. This is noticeably true for Brent, where 12% of the population are on income support, (a relatively high percentage compared to Great Britain where 8% are on income support). Furthermore, literacy skills are particularly low in the White City and Shepherd's Bush area (Hammersmith and Fulham), where unemployment levels are the highest in the borough. Similarly, Carlton in Brent has the highest unemployment rate in the borough and also the highest proportion of the population with poor literacy skills. General qualification levels of the unemployed are also lower in the London West LSC area, for example 38% of those in employment are qualified to NVQ Level 4 and above, compared to only 26% of those who are unemployed. Furthermore, only 9% of those in employment have no qualifications, compared to 22% of those who are unemployed.

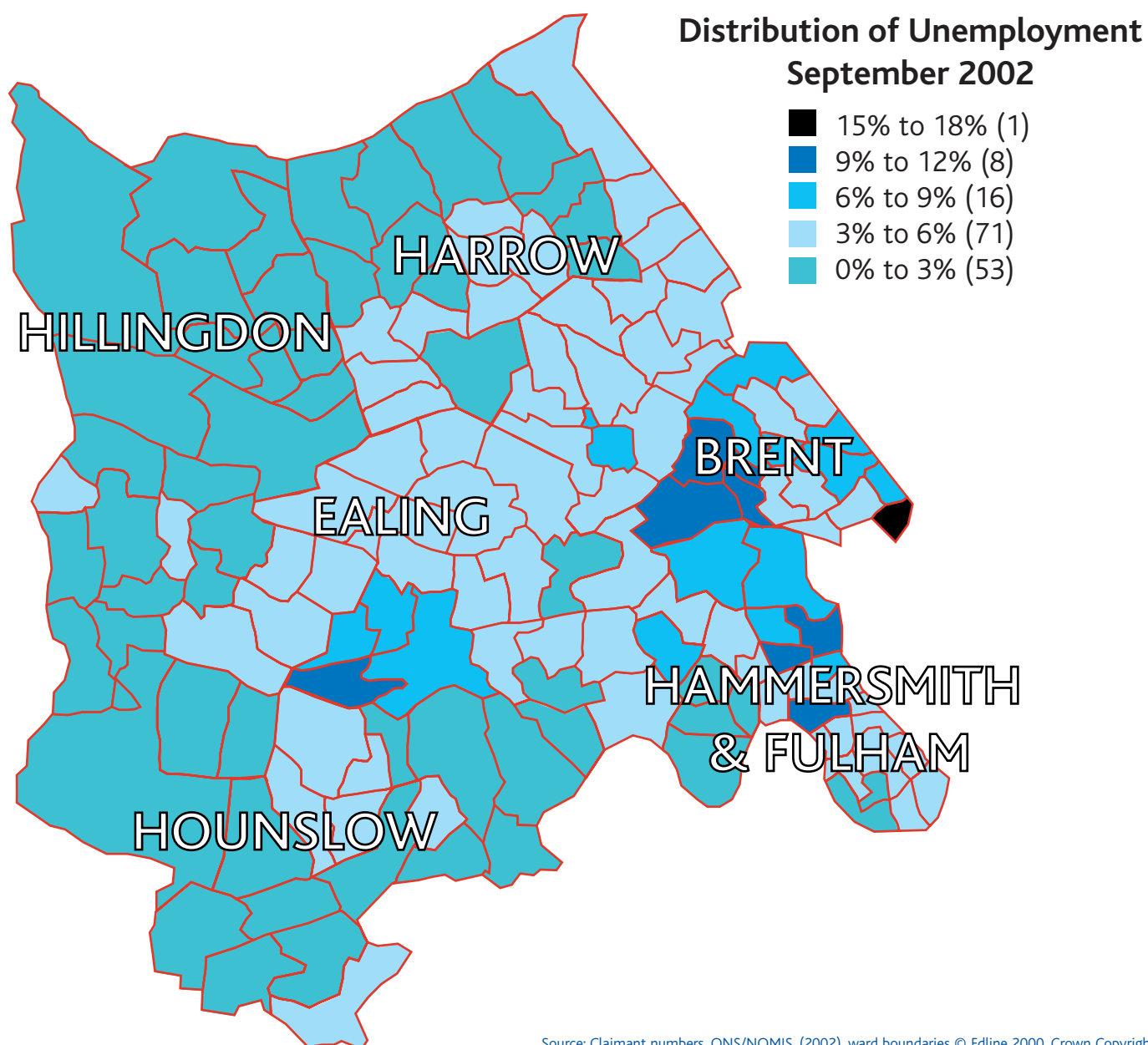
Unemployment Rates by Borough (September 2002)



Source: Claimant numbers, ONS/NOMIS, LSC borough % rate estimates, Taylor Associates

Employment and Unemployment continued

The following map shows levels of unemployment by ward across the London West area:



Source: Claimant numbers, ONS/NOMIS, (2002), ward boundaries © Edline 2000, Crown Copyright

The New Policy Institute (1998) highlights the fact that certain households are particularly vulnerable to long-term unemployment, for example, lone parent households, minority ethnic households, and households headed by someone with a disability have an above average likelihood of long-term unemployment. The lone parents baseline research, commissioned by London West LSC, found that

nearly a quarter of lone parents surveyed were unemployed, and only a fifth were in full-time employment.

Unemployment is a major cause of low income and deprivation. Those in long-term workless households are often on low incomes, will probably be on income support, and may be in heavy debt.

Education and Achievement

- In total, there are 130 secondary schools in the London West LSC area, with a total of 78,390 pupils.
- In the school year 2000/2001, there were 248 permanent exclusions in secondary schools in the London West LSC area. Harrow had the highest number of exclusions (58), whilst Ealing had the lowest (29).
- English is an additional language for 36% of pupils in secondary schools in London West. The highest proportion of pupils with English as an additional language is in Brent (45%).

GCSE Passes, 2002			
Percentage of all pupils aged 15			
	5+ A* - C	5+ A* - G	No passes
England	52	89	5
London West LSC	51	90	3
Ealing	50	91	1
Hillingdon	46	89	5
Hounslow	50	89	5
Brent	50	90	4
Harrow	59	91	3
Hammersmith & Fulham	50	91	3

Source: DFES Performance Tables, 2002.
(Please note that these results were not published until January 2003).

GCSE results for the London West LSC area as a whole have improved considerably since 2001, when 48% of pupils aged 15 achieved 5 or more GCSE passes grades A*-C. The pass rate for 2002 has risen by 3% since 2001.

Out of the six boroughs, Harrow has the highest share of pupils achieving at least 5 GCSE passes grades A*-C, with 59%. Since 2001, Brent, Ealing, Harrow and Hounslow have all seen improvements in the percentage of pupils achieving five or more GCSE passes at grades A*-C. The most noticeable improvements have taken place in Brent (a rise of nearly 4%) and Hounslow (a rise of over 3%). There has been a 1% fall in pass rates in Hillingdon, and slightly less in Hammersmith and Fulham.

The percentage of pupils in each London West borough gaining no GCSE passes is lower than the average for England.

'A' Level results are not available yet, but will be included in the next edition of 'Insight'.

Skill Gaps and Job Vacancies

The London West LSC area has a highly skilled workforce. Thirty-four per cent of the resident population are qualified to NVQ Level 4 and above and 53% are qualified to NVQ Level 3 or above. However, a substantial proportion of the population in the London West LSC area (17%) have no qualifications at all.

Given the continued relative buoyancy of the local economy, businesses in London West are more likely to have skill shortages in their existing staff or find it difficult to recruit than businesses in any other LSC area in London. The 2000 Employer Survey revealed that 10% of firms in the London West LSC area were experiencing a 'skills gap' and 26% of firms had difficulty recruiting in 2000. Inevitably, this has a detrimental impact on the performance of businesses in London West and their workforce, with consequences for sustainable growth. The 2000 Employer Survey showed that the main impact of hard-to-fill vacancies was more overtime or pressure on existing staff, followed by loss of business opportunities or growth and reduced quality of products or services.

The sector in which skill gaps were most frequently reported in London West was public administration, defence and social security. The most commonly reported skill gap for higher skilled occupational groups was 'computer literacy/user skills', whilst for the lower skilled occupation groups, it was 'technical or practical job related skills'.

With the construction of Heathrow Terminal 5 underway, the London West area faces a number of training and skill needs in the construction sector. There are decreasing numbers of skilled workers to meet the needs of this project, and a wide range of skills are required, for example pipe-layers, electricians, construction managers and site engineers.

- Information suggests that only about a third of all vacancies are advertised in local job centres. In the quarter ending September 2002, there were approximately 14,264 notified job centre vacancies in the London West LSC area (compared with a lower figure of 13,976 in the quarter ending April 2001). Hillingdon had the highest number of vacancies (3,622), followed by Brent (2,824).

Skill Gaps and Job Vacancies continued

Breakdown by borough: Notified vacancies (quarter ending September 2002)

	Total number of notified vacancies
London West LSC Area	14,264
Ealing	2,242
Hillingdon	3,622
Hounslow	2,524
Brent	2,824
Harrow	1,402
Hammersmith and Fulham	1,650

Source: Quarterly Count of Job Centre Vacancies, ONS/NOMIS

The following table shows the top 10 vacancies notified in the London West LSC area in the quarter ending September 2002:

Top ten notified vacancies

Occupation	Number of Vacancies
Sales and retail assistants	1,052
Cleaners, domestics	926
Van drivers	878
Security guards and related occupations	777
Kitchen and catering assistants	744
Goods handling and storage occupations	579
General office assistants / clerks	390
Heavy goods vehicle drivers	379
Chefs, cooks	334
Bar Staff	324

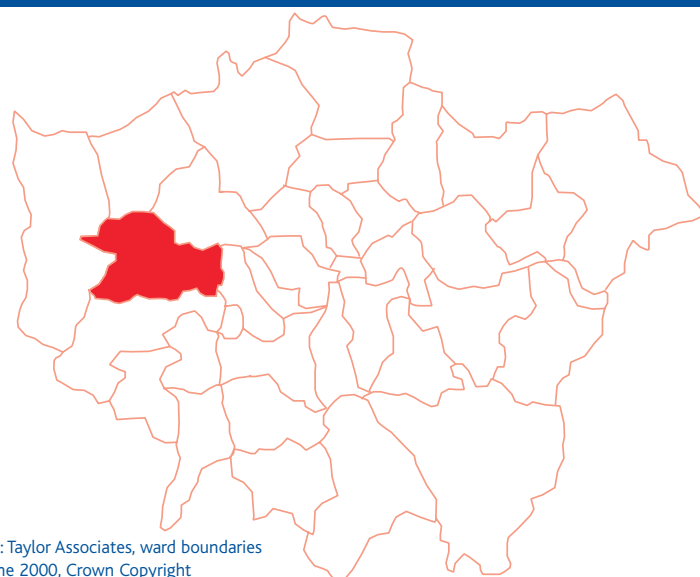
Source: Quarterly Count of Job Centre Vacancies, ONS/NOMIS

Borough Profile: Ealing

The borough of Ealing lies in the heart of west London, and is only twenty minutes from the West End. The seven districts of the borough are Ealing, Hanwell, Acton, Southall, Greenford, Perivale and Northolt. It has a diverse culture and is renowned for the famous Ealing studios, whose peak was during the 40s and early 50s with successful productions like the Ealing comedies. Southall, in Ealing, boasts the largest Asian shopping centre in the capital, offering authentic goods and cuisine, including a vast array of spices, silks and gold jewellery.

Results from the 2001 population Census show that there were 300,948 residents of Ealing in 2001, and 118,023 households. The population has increased by 5.7% since the 1991 Population Census.

In 2001, 59% of Ealing's population were white. The largest non-white ethnic minority group was Indian, which accounted for 16.5% of the population, followed by Black Caribbean (4.5%) and Other Asian (3.9%).



Source: Taylor Associates, ward boundaries
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Ethnic Population Forecasts for Ealing, 2006

Percentages of all persons

White	Indian	Pakistani/ Bangladeshi	Other Asian	Black Caribbean	Black African	Other Non-white	Total
60%	17%	4%	5%	6%	4%	6%	100%

Source: LRC Population Estimates, 1996 base.

75% of Ealing's population are aged between 16-74, whilst 20% are aged between 0-15.

Employment

In 2001, 64% of people aged 16-74 living in Ealing were economically active. The table below shows the number of employees by sector in Ealing.

The table shows the overwhelming importance of the real estate, renting and business activities sector as an employer in Ealing. This sector accounts for a quarter of all employment in the borough. This

follows trends for the London West LSC area as a whole. The retail and wholesale distribution sector is the next most important sector in terms of employment. These two sectors account for nearly a half of all employment in the borough.

In Ealing, the real estate, renting and business activities sector saw the largest growth in terms of number of employees between 1999 and 2000, witnessing an increase of 17%. This was closely followed by the financial intermediaries sector which saw an increase of 15%.

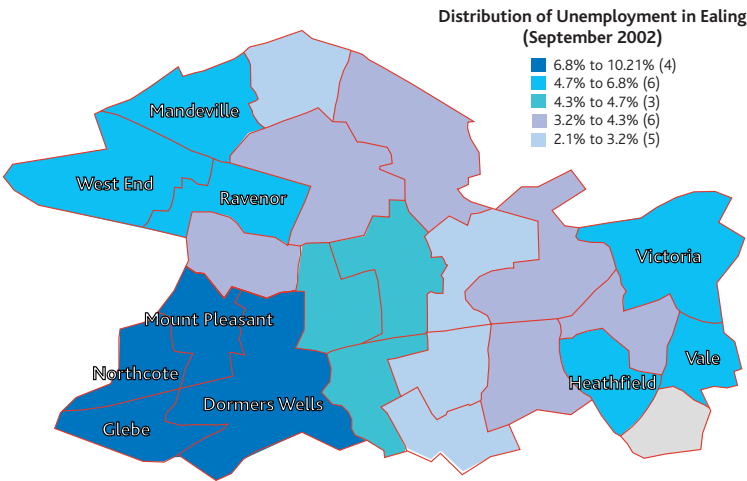
Sector	Ealing		London West LSC Area	
2000	Employees	%	Employees	%
Manufacturing	12,800	11	61,800	9
Construction	5,500	5	28,300	4
Retail & wholesale distribution	25,200	22	129,700	19
Hotels & catering	7,100	6	41,600	6
Transport & communications	9,700	8	90,300	13
Financial intermediaries	1,300	1	14,800	2
Real estate, renting & business activities	28,500	25	154,100	22
Public administration	3,200	3	30,300	4
Education	6,500	6	39,500	6
Health and social work	8,500	7	48,600	7
All other	6,100	5	48,700	7
Total	114,400	100%	687,700	100%

Source: ONS/NOMIS 2002

Borough Profile: Ealing continued

Unemployment

In September 2002, there were a total of 6,548 claimants at job centres in Ealing, (an unemployment rate of 4.5%). The statistics show that the number of claimants had risen slightly (by 785) since July 2000. Unemployment rates have been calculated for wards in Ealing and are shown in the map below.

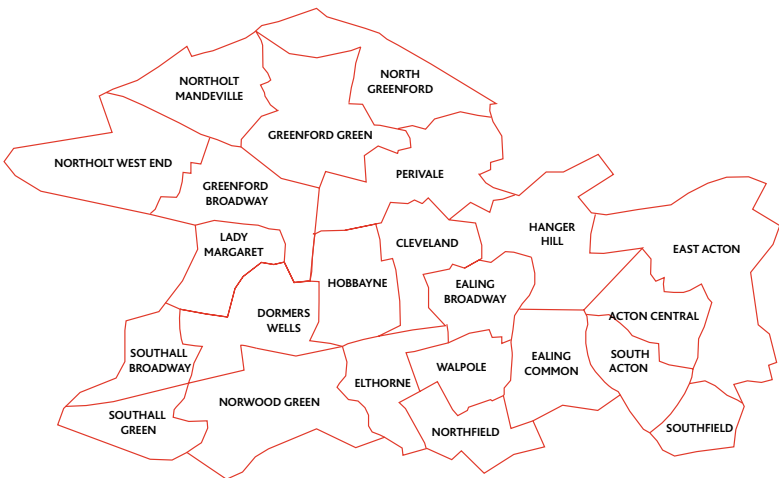


Source: Claimant numbers, ONS/NOMIS, (2002)
Taylor Associates, ward boundaries © Edline 2000, Crown Copyright

The ward with the highest level of unemployment is Glebe, which has an unemployment rate of 10.2%. Wards with relatively high unemployment (where the rate lies between 6.9% and 6.2%) are: Mount Pleasant, Northcote, Dormers Wells, Heathfield, and Victoria. Wards with relatively low unemployment (where the rate lies between 3% and 2.1%) are: Wood End, Southfield, Northfield, and Pitshanger.

In July 2002, 3.9% of unemployed claimants in Ealing had been unemployed for over 2 years, this compares to 5.2% of claimants in the London West LSC area (ONS/NOMIS, July 2000). Long term unemployment in Ealing has fallen steadily since July 2000, when 9.3% of unemployed claimants had been unemployed for over 2 years.

(Please note that following the Boundary Commission Report, ward boundaries and in some cases ward names have changed in the borough of Ealing. The map below shows the new ward boundaries and names, effective from May 2002).



Industrial structure

In 2000, there were approximately 12,600 workplaces in Ealing. A workplace is defined as an Annual Business Inquiry (ABI) Unit.

The following table shows the importance of workplaces by their size, as measured by the total number of employees.

Company size (Employees)	Ealing		London West LSC Area	
	No. of workplaces	%	No. of workplaces	%
199+	100	1%	500	1%
50-199	300	2%	1,700	3%
25-49	400	3%	1,800	3%
11-24	800	6%	4,100	6%
Under 11	11,000	87%	55,000	87%
Total	12,600	100%	63,100	100%

Source: ONS/NOMIS 2002

The key point to note is that most workplaces are small.

In 2001, there were 10,285 VAT registered companies in Ealing, an increase of 335 companies since 2000 and 1,980 since 1994. The real estate, renting and business activities sector saw the greatest increase in the number of VAT registered companies since 1994.

Education Participation and Skills

- There are 27 secondary schools (including 5 special schools) in the Ealing LEA area.
- In 2001, Ealing had 15,091 pupils in secondary schools.
- In January 1999, English was an additional language for 46% of primary school pupils and 41% of secondary school pupils in Ealing.
- In the school year 2000/2001, there were a total of 29 permanent exclusions in secondary schools in Ealing. Ealing had the lowest number of permanent exclusions out of all the London West LSC boroughs.

Statistics show that the performance of students at GCSE level in the borough is improving over-time. In particular, there was a significant improvement in GCSE results between 2001 and 2002, as shown in the table below. However, Ealing students still perform slightly worse than the UK average.

Percentage of Students with 5 or more A*-C GCSEs					
	1998	1999	2000	2001	2002
Ealing	45%	46%	46%	47%	50%
England Average	46%	48%	49%	50%	52%

Source: DFES Secondary School Performance Tables, 2002 Note: Excludes Special Schools and 'Foreign' schools

Results from the 2001 Census show that 35% of residents aged 16-74 in Ealing hold qualifications at degree level or higher, whilst 22% have no qualifications at all.

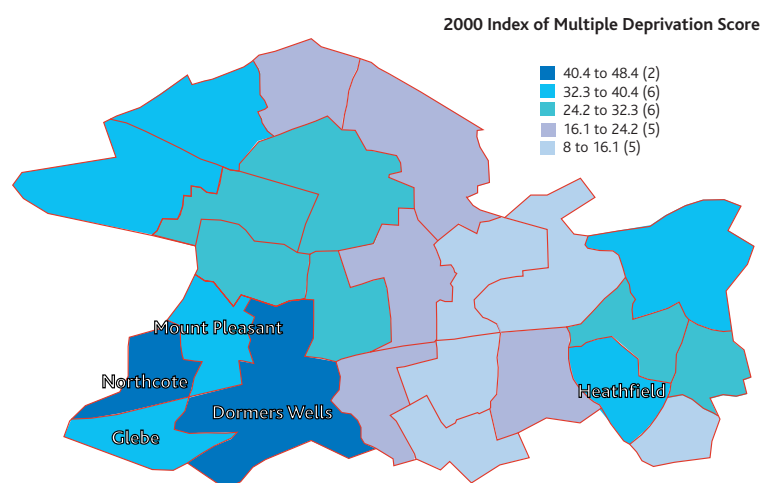
Out of all London West LSC boroughs, Ealing has the highest number of people with poor literacy skills (24% of the population). Furthermore, 24% of the population have poor numeracy skills. The percentage of the population with poor numeracy skills varies across the wards of Ealing. Glebe has the highest concentration of poor numeracy skills, with an estimated 41% of the population between 16-60 with poor numeracy skills. A number of wards in Ealing have concentrations of poor literacy skill levels, with Northcote having the highest estimated percentage of the population aged between 16-60 with poor literacy skill levels with 41% (Basic Skills Agency, 2001).

Deprivation in Ealing

The 2000 Index of Multiple Deprivation is calculated for the Department of Environment, Transport and the Regions (DETR). The Index is constructed by calculating the extent to which English local authority areas diverge from English averages of social conditions. Indicators cover topics such as: employment; income; health; education; and housing. Out of 354 areas, in 2000, Ealing was ranked 107 in terms of deprivation (1 being the most deprived area).

Information is also available at ward level. The most deprived wards are: Dormers Wells, Northcote, Glebe, Heathfield, and Mount Pleasant. All of these wards are located in the Southall area, except Heathfield, which is located in Acton.

Ten per cent of the population aged 16 and over are in receipt of income support, compared to 9% for the London West LSC area (Income Support Quarterly Statistical Enquiry, February 2002).



Source: Index of Multiple Deprivation, DETR, (2000) © Edline 2000, Crown Copyright

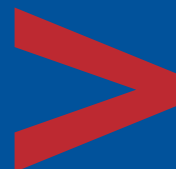


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