



▶ INCLUSIVE
GROWTH
STRATEGY
2019-2040

SYNOPSIS



▶ FOREWORD

In uncertain times it is a platitude to say that the only thing we can be sure of is change. Local Authorities have a greater responsibility to the people living and working in their areas. We must more deeply examine the underlying causes of change, and scan the horizon of different futures that may be realised. It is essential efforts are made now to understand and grasp emerging and likely longer term opportunities for businesses, residents and the wider benefit of the borough, and to plan and mitigate against negative impacts that may threaten prosperity and wellbeing.

All the evidence points to significant growth in London and in Brent going forward. By 2040 Brent's population is forecast to increase by at least 17% and reach 400,000 people. Demographic trends also point to higher forecast growth in both our younger and older populations. Successful growth is typically measured by economic indicators: numbers of jobs, earnings levels and the total amount of wealth. Such measures do not tell the whole story. The benefits of growth are too often shared unequally with change leaving behind too many in our communities. As London's economy has grown, so too has inequality. If growth is to be inclusive, then everyone must participate and share fairly in the increased prosperity it brings. Local government has a vital leadership role to play in proactively shaping and influencing change and the change-makers, to facilitate conditions where people are empowered to take advantage of the opportunities that stem from growth, and to reduce poverty and inequality.

Moving forward, global and macroeconomic trends including; technological advances, climate change, demand for scarce resources, working and consumption patterns and lifestyle choices, will fundamentally alter the nature of how our local economy operates. In turn the implications on the skills and resources needed for a competitive business base, and how people choose to live their lives, travel, work and interact socially and culturally in a denser modern growing city are significant.

No strategy can reliably and precisely predict these futures, nor answer all the challenges that they will bring. Brent's Inclusive Growth Strategy and supporting research base does however take a deep dive into the evidence and trend data across the broad sweep of demographic and socioeconomic factors that make up and affect our borough, its people, prosperity and place.

Local policy responses to what can be London-wide or global problems and drivers of change are viewed and drawn up through the lenses of Brent's Economy, Education and Skills, Housing, Infrastructure, Environment, Health and Culture. An action plan then sets out targeted local interventions and initiatives to achieve the policy objectives, help ensure that we can cope with the pressures that growth will bring, and that growth is truly inclusive, benefits all and reduces inequalities in Brent over the short, medium and long term futures.



CLLR TATLER
Cabinet Member for
Regeneration, Property
and Planning

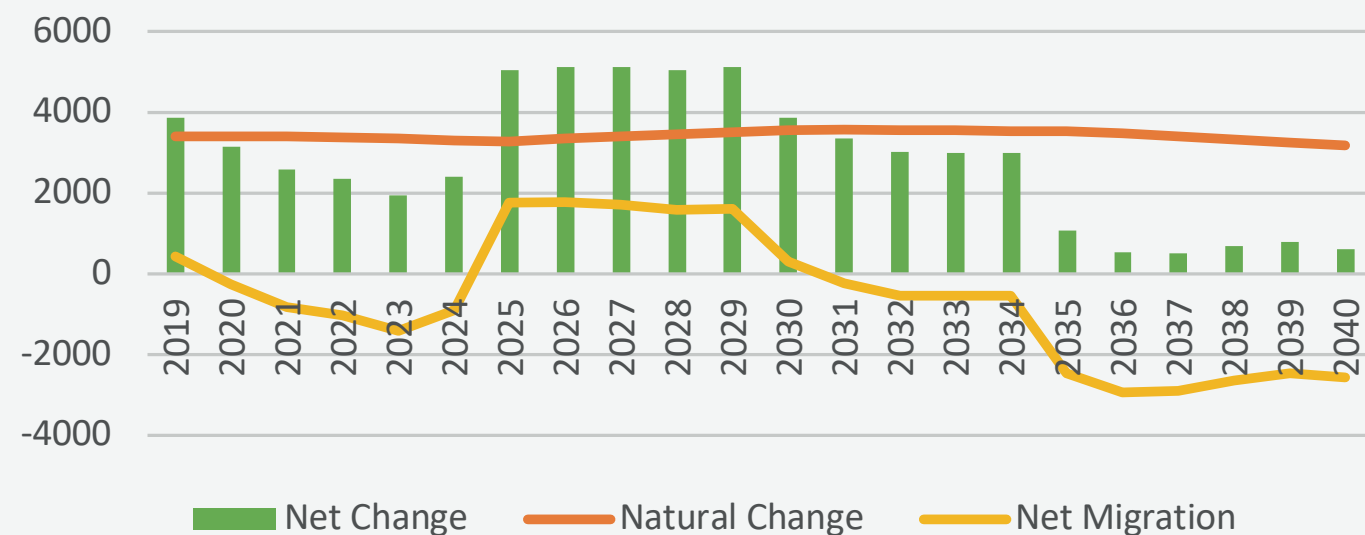


INCLUSIVE GROWTH STRATEGY

Changes the future will inevitably bring include technology, globalisation and new lifestyles, all of which will have profound impacts on Brent. The Inclusive Growth Strategy looks at what position the borough is in now, the key trends likely to affect the borough, and potential responses and initiatives to guide and shape how those trends will impact the borough.

Brent's population is projected to grow by at least 17% between now and 2040, when it is expected to reach 400,000 people. Population growth is driven by various factors, including inward and outward migration, natural change (the difference between birth and mortality rates) and regeneration plans, with forecasts subject to change.

Drivers of Population Change 2019-2040



Population growth will not be distributed equally across different demographics. During this time, Brent's population will age significantly. The number of people aged over 80 years old in 2040 will be almost double what it is today, and 28% of people aged over 65 will be aged over 81 in 2040. Brent's younger population will also grow. The 0-24 age group is projected to grow by 8% by 2040, with this growing younger population having the potential to offset some of the impacts of Brent's ageing population.

Aside from population trends, wider societal changes such as globalisation and growing inequality will continue to impact people's lifestyles, employment and educational requirements. The rise of automation, growth of the knowledge economy and

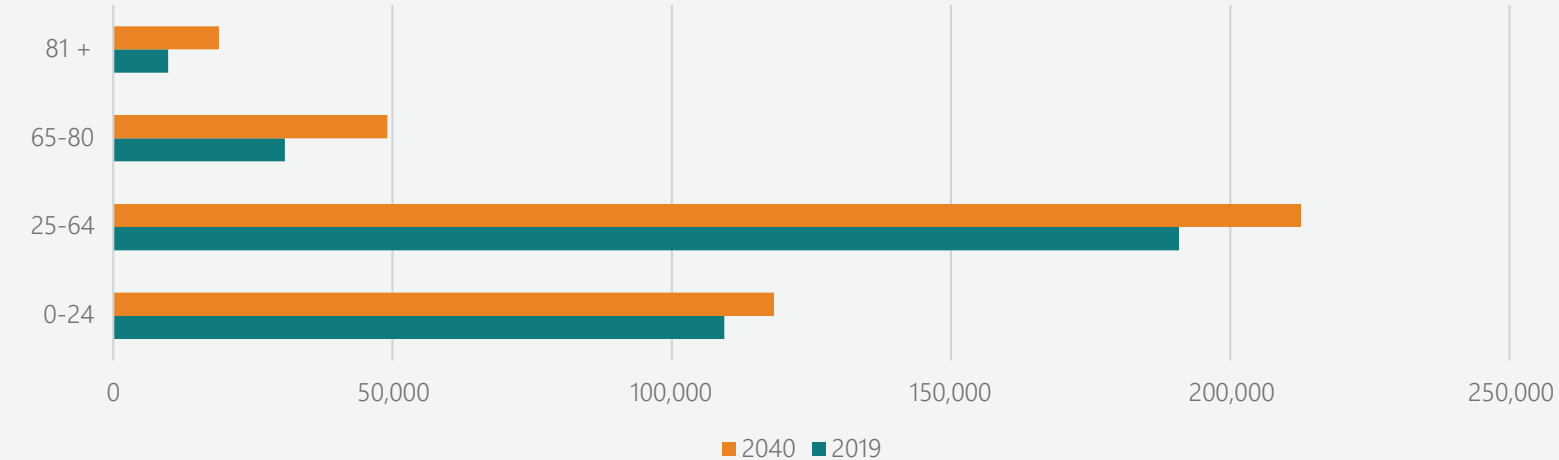
changing working patterns will all impact employment, and education and skills demands, across London – and the sectoral make up of Brent's economy and workforce means that around a third of jobs in Brent are identified as at higher risk of automation.

Amidst these changes, London's economy is projected to continue to grow – however, recent growth shows that increasing inequality in the distribution of income and wealth can often be an unintended consequence of growth. New development and infrastructure attracts new people to places, and existing local residents can feel left out.

Growing inequality has not gone unnoticed by policy makers, politicians and the public. There is an increased focus on ensuring the benefits of economic growth are more equally shared amongst the population. Community wealth building proposes a place-based approach to economic regeneration to empower local government and enable communities to create and retain wealth locally, in order to build an economy that starts with local conditions and builds upwards.

Local conditions in Brent include at £575 the second lowest weekly earnings in London. Income levels also vary widely from ward to ward, with people living

Demographic Change 2019-2040



in Stonebridge having the lowest median household income (£25,800) and Queen's Park has the highest (£42,880).

The Inclusive Growth Strategy aims to tackle inequality, and includes actions which seek to empower local people and encourage community cohesion, whilst supporting economic growth in the borough.

In order to develop an Inclusive Growth Strategy which covers the breadth of change expected, both locally and globally, the strategy is divided into 7 themes.

▶ OUR THEMES

Housing



In 2018, there were 118,710 homes in Brent. Northern parts of the borough tend to a more suburban character, whilst southern parts are more densely populated and urban in form. Brent is a relatively expensive place to live, with an established trend of housing costs outstripping lower wages, making housing unaffordable for many and increasing inequality.

Environment



Brent's environment will come under heavy pressure from a growing population and the effects of climate change, which will occur alongside a widening mismatch between resource supply and demand. Coordinated action by businesses, politicians and individuals must be taken to mitigate the growing threat of climate change.

Economy



Technology, growth of the knowledge economy, and changing working patterns will all impact on employment, and education and skills demands, across London. London's growth in professional sectors, and a third of current jobs in Brent identified as at higher risk of automation, will drive demand for a more highly skilled workforce.

Education and Skills



Due to changes in the economy, workers are likely to demand more flexibility in work, and there will be a greater need for training, re-skilling and opportunities for development in the future. This is a particularly pressing issue for Brent given lower than average employment rates, concentrated amongst specific groups.

Health



Health in the context of the city is multifaceted, requiring an understanding of demographics and the many social and environmental factors and behaviours that are determinants of health, alongside the health and care systems that are expected to deliver the services and treatments to address ill health and disease.

Infrastructure



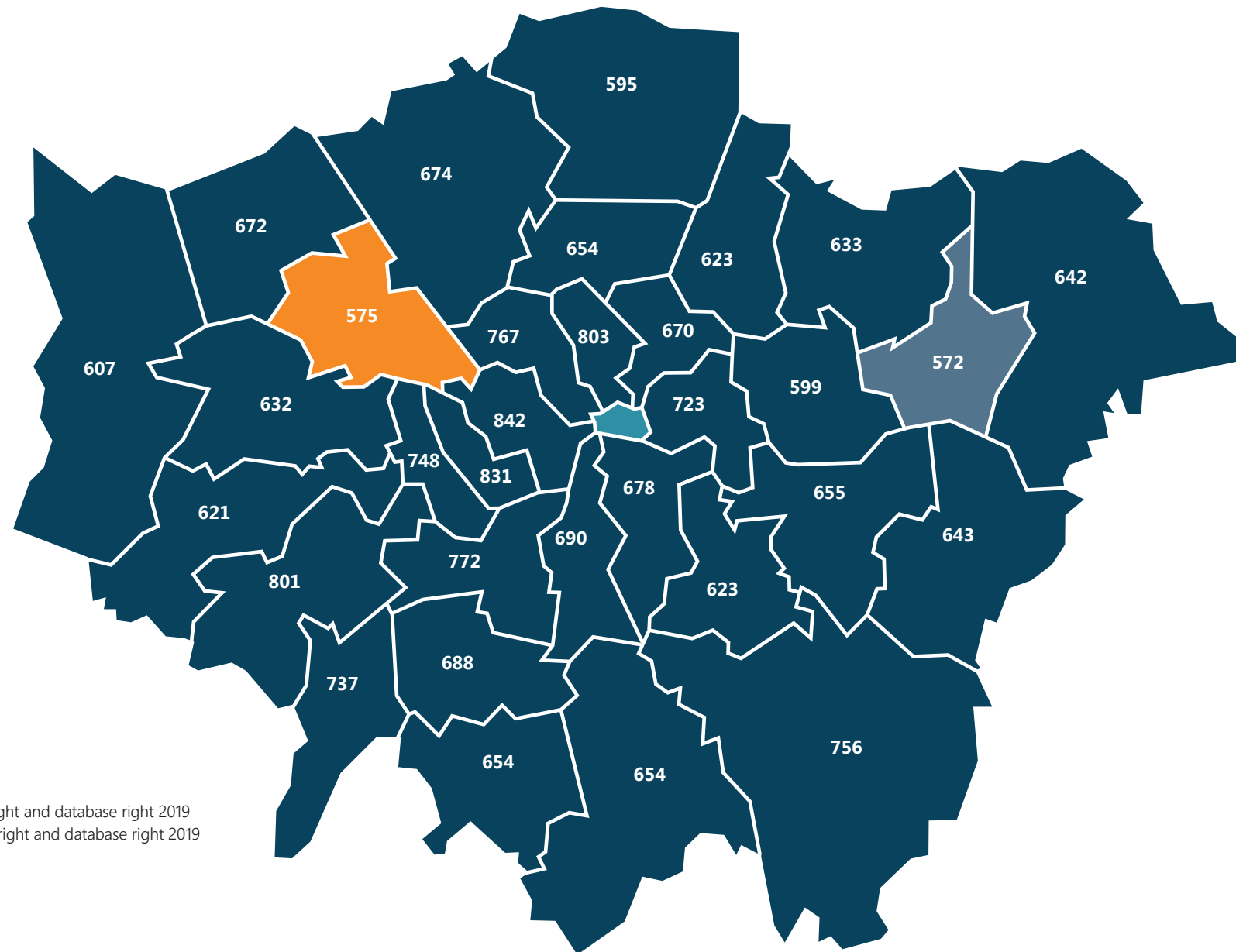
To accommodate growth, meet environmental requirements, and align with national and local policies in London, Brent must consider current capacity of existing transport, digital, water, energy and green infrastructure, projected future demands, and the likely impacts of future policy changes.

Culture



Culture permeates all aspects of peoples' lives. From placemaking, to leisure, to employment, culture plays a huge role in the ecology and soul of communities. Creative economy jobs, exports and Gross Value Added (GVA) have to date grown faster than any other sector, and although up to 30% of jobs in London are at risk of automation over the next 20 years, 87% of highly creative occupations are considered to be at low risk of automation.





GROSS WEEKLY PAY

- Less than Brent
- Brent
- More than Brent

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Changes to the economy are at the forefront of people's minds, with the uncertainties of Brexit, the increasing

role of technology, and the changing nature of employment.

TOP TRENDS

COMPETITIVENESS AND BUSINESS PERFORMANCE

Brent is home to over 15,000 enterprises, who employ over 130,000 people and generate a Gross Value Added (GVA) to the economy of over £9 billion. Gross weekly full-time earnings in Brent are however low at £575, 11% lower than the Outer London average, and 2nd lowest amongst London boroughs.

Industries related to distribution, transportation, food and accommodation contribute the largest proportion of GVA in Brent, with construction and manufacturing having a lower GVA, but contributing more in comparison to other parts of London. Brent has experienced 24% business growth and 10% employment growth in the last 5 years. Business births have exceeded business deaths in Brent over the past decade, accounting for 2,680 new business in 2017. Brent business mortality rates have increased however, with 12.9% of businesses failing in 2017, compared with 11.7% in 2006. Alongside the increase in the number of businesses, 63% of Brent enterprises that experienced growth had turnovers increase by up to 5%, and 23% of these had turnovers that increased by over 20%.

High growth businesses are defined as having 10 or more employees and average annualised growth of

20% or more. High growth businesses are particularly important to the local economy – due to their crucial role in creating jobs and resilience in economic downturns – and Brent had one of the largest number of high growth businesses in Outer London.

NEW INDUSTRIAL REVOLUTION

The new industrial revolution is characterised by a fusion of technologies between the physical, digital and biological spheres, in fields such as robotics, Artificial Intelligence (AI), autonomous vehicles, and 3-D printing. In 2017, PwC forecast that UK GDP could increase 1.9% by 2030 as a result of automation in production industries. Technologies like robotics and AI are particularly significant for production industries, due to the potential to increase productivity through the expansion of the labour force and automation of some roles. In Brent, automation in production industries could have significant impacts, due to a third of jobs in the borough being in sectors identified as at higher risk of automation: manufacturing at 6.3%, wholesale and retail at 17% and transport & storage at 7.1%. Retraining will therefore become an increasing necessity during the working lives of many of Brent's residents.

INCREASING SELF EMPLOYMENT

Self-employment is a growing part of the UK jobs market. Since 2008, the number of UK jobs has increased by just over 2 million, of which nearly 1 million (44%) are self-employed jobs. The growth in self-employment reflects a shift in mind-set in peoples' preferences to work, flexibility and risk appetite. Workers want more flexibility, control and variety of work. This is partly a by-product of changes in societal norms, for example, more women working full-time and more men taking on responsibilities outside the workplace. For many parents, older workers and people with health issues and disabilities, full-time work is not something they are able to commit to, therefore self-employment or gig economy work is more suited to their needs.

At the same time labour market insecurity is increasingly prevalent, with the rise of the gig economy and zero-hours contracts. In 2018, 3.2 million people faced insecurity in work in the UK and were working on a contract that did not guarantee employment rights. Many enter low wage self-employment because of fewer opportunities in traditional employment. The rise of insecure work does not affect all groups equally. Evidence shows that 1 in 13 BAME employees and 1 in 8 Black employees are in insecure work, versus the 1 in 17 average across the UK working population. Women are also more likely to be on zero hours contracts,

with 52% working on zero hours contracts. These disadvantages in the national labour market are mirrored in Brent's population, with BAME people and women having some of the lowest economic participation rates.

RESPONSES

SUPPORT AND DEVELOP BUSINESSES IN BRENT

Create and develop a Council led business support model and encourage business representation through an area specific Chambers of Commerce.

LOCAL ENTERPRISE ZONES FOR BRENT

Establish local enterprise zones in the borough to stimulate economic growth, consolidating infrastructure, attracting new businesses and creating jobs.

CURATE A STRATEGIC VISION FOR WORKSPACE

Ensure access to a variety of workspaces to meet business needs.

DETAILED APPROACH TO INDUSTRIAL LAND

Review, segment and sub-classify the industrial land portfolio to provide directive planning policy.



▶ EDUCATION AND SKILLS

Due to changes in the economy, workers are likely to change jobs more regularly over their lifetime, and therefore require greater training, re-skilling and opportunities for development in the future. The shape of educational provision in the borough including: early years, primary, secondary and post 16 education, apprenticeships and higher education, will have important implications for labour market outcomes.

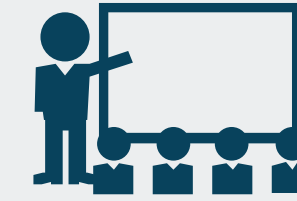
TOP TRENDS

UNDERPERFORMING GROUPS

Brent's overall educational performance continues to improve. In 2018, Key Stage 2 performance for Brent was in line with national average (63% compared to 64%); however, there was a 56% gap between the highest and lowest performing schools. In the same year, 69.7% of Brent students achieved 9-4 (A*-C) in English and Mathematics, which is above the national average (64.4%) for the first time. Out of the 13 schools that do have recorded measures for Progress 8 at Key Stage 4 (all scores above 0 are positive), there is a 1.97-point gap between the highest and lowest performing schools (excluding SEN schools). In addition, although Progress 8 scores are 0.54 for all pupils in Brent, significantly higher than the national average, scores vary by ethnicity – with Black pupils markedly (0.09) lower than all other demographic groups.

Disparity in attainment and progress is a key consideration for Brent, as the borough has lower than average employment rates, concentrated amongst specific groups. Brent has, and has historically had, demographic based underperformance – a trend that, together with migration patterns and a shifting ethnic mix, warrants continual monitoring, to ensure fairness, equality of opportunity and prosperity for all.

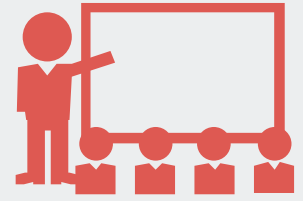
In 2018, the employment rate in Brent for Black or Black British people was 57.5%, compared with 77.1% in the White population. The female employment rate in Brent



Brent
76.7%



London
78%



Great Britain
74.9%

5 or more GCSEs A*-C

has been consistently lower than the UK average, and in 2018 was just 62.8%. This is the 6th lowest rate in London. Brent also had the 5th highest percentage of the female population looking after the family and home, rather than being economically active.

CHANGING EMPLOYMENT

Since 2010, employment policy has mainly focused on getting people into work, and the UK employment rate at 78% in 2019 was the highest since comparable records began in 1971. More pressing for the future will be a renewed focus on the demographics of the working population, the types of employment that are being offered, and in turn what skills are required. Changes in employment will be particularly present in the borough as Brent employs relatively larger numbers of people in sectors projected to decline across London including: manufacturing, transportation and storage, and wholesale.

At the same time, jobs in the professional, real estate, scientific and technical

sectors are expected to account for over a third of new jobs expected in London. Groups with low educational attainment levels and labour market outcomes could therefore potentially be further disadvantaged in an increasingly high skilled labour market, which has potential long term economic implications for Brent and its residents, given Brent's lower than average employment rates.

INCREASE IN OLDER WORKERS

Employment of older workers has grown significantly over the past 30 years, with the employment rate for people aged 50-64 years growing from 55.4% to 72.6%. Demographic and government policy changes are due to impact older workers going forward. The State Pension age has gradually increased for women, rising to 65 years and reaching equality with men in November 2018. State Pension age is due to increase for both women and men to 66 years by October 2020 and to 67 by 2028.

RESPONSES

SUPPORTING PEOPLE INTO WORK

Build on and facilitate training opportunities, careers advice and guidance for those entering and re-entering the job market.

SUPPORT UNDERPERFORMING GROUPS

Reduce inequality and the educational and employment attainment gap between different demographic groups in the borough by targeting priority underperforming groups.

IMPROVE SKILLS LEVELS FOR WOMEN

Raise levels of skills and employment for women in the borough.

OFFER RETRAINING AND UPSKILLING OPPORTUNITIES

Utilise the wider educational provision to better equip people with skills to complement new jobs, and to retrain where jobs are lost.



▶ HOUSING

A growing population will place further pressures on Brent's existing housing stock and increase demand for the development of new homes. A new and changing housing picture is expected to emerge, where lifestyle trends, affordability and tenure will redefine the housing market, both in the private and public sector.

TOP TRENDS

INCREASING UNAFFORDABILITY

In 2018, there were 118,710 dwellings in Brent, the 12th highest of the 33 London boroughs. Worsening supply and demand imbalances in the housing market, however, have contributed to significant increases in house prices, with around 80% of new build homes affordable to only 8% of London households.

Average house prices in London have grown more than 6 times from their 1970 level, after adjusting for inflation. Notwithstanding some recent cooling in the property market since the EU referendum in 2016, the fundamentals are of significant house price growth, outstripping earnings growth. The Land Registry House Price Index (HPI) shows the average property price in Brent increased by 78% from 2009 to 2019, from £261,000 to £464,000. Due to the limited capacity within the private housebuilding industry, with a small number of volumetric housebuilders currently dominating the marketplace, and high costs of developing large sites, housebuilders seek to recover their investment by increasing density, reducing the levels of affordable housing and building more slowly, to ensure that local markets are not saturated.

Brent has the highest number of housing benefit claimants in Outer London, as well as a high proportion of households in Temporary Accommodation, and a growing number of rough sleepers – all symptomatic of an undersupplied and unaffordable local housing market.

**78%
Increase**



**2009
£261,000**



**2019
£464,000**

INCREASE IN THE PRIVATE RENTED SECTOR

London's Private Rented Sector (PRS) has doubled in just over a decade and continues to rise, with private renters projected at 40% of London's households by 2025. Brent had the 12th highest median private rent levels in London, and the highest median private rent levels in Outer London. Concentration and distribution of renters varies across the borough. The highest proportion of private renting is in Mapesbury and Willesden Green where 45% and 43% of the population rent from the PRS. Northwick Park and Stonebridge have a much lower proportion of private renters, at 19% and 15%, and a much more people in social rented housing (65% in Stonebridge).

There is a growing high quality segment within the PRS for those who can afford it, mainly concentrated in the south of the borough. At the other end of the spectrum, there is prevalence of disrepair, poor management and overcrowding. The vast

majority of homes in the PRS are owned by small scale, amateur landlords which tends for a disparity in renting experience. The Council has therefore introduced a PRS licensing scheme in an effort to raise standards. Large scale 'Build to Rent' developments have also increased significantly in the last couple of years, notably in Brent at Wembley Park, and are driving further growth in the private rented sector.

CHANGING HOUSEHOLD MIX

Brent's average household size at 2.8 persons per household is the 3rd highest in London. A third of council stock constitutes bedsit and 1-bedroom homes, which makes up over half of all lettings, but represents under a third of demand. Demand for larger 3 and 4-bedroom homes, however, is double the available lettings. Whilst historic and current trends show a rise in household size in Brent (since 1991), the CLG estimate household sizes to decrease rapidly over the 20 year period. Brent's predominant housing needs (65%) are for larger sized (3 bedroom or more) family dwellings. The borough has a history of overcrowding. 12.1% of households experienced overcrowding according to the 2011 census, but levels vary across the borough, with the overcrowding level in Wembley Central around 20%. Overcrowding combined with a growing trend towards multi-household families in both affordable and open market housing will likely impact housing demand going forward.

Currently a third of council tenants are over 60 years old, 4% of tenants have a disability and 8% have a vulnerability. Over the next 20 years, projections show an anticipated 68% increase in the older population (over 65 years old), which will prompt the need for different housing typologies, increasing demand for extra care and specialised leasehold housing schemes.

RESPONSES

COUNCIL LED HOUSING DELIVERY

Expand its housing remit through property management and the acquisition of land and property for housing delivery.

BUILD ON RELATIONSHIPS WITH LANDLORDS IN THE BOROUGH

Expand and develop existing licensing schemes in the borough to drive up standards in the Private Rented Sector and enhance information sharing and data gathering with private landlords.

TECHNOLOGY IN HOUSING DELIVERY

Embrace new and emerging technologies and endeavour to become an early adopter and leader at a local authority level.

DIVERSIFY HOUSING DELIVERY

Diversify the range and type of housing built within the borough through planning policy and close working relationships with landowners, developers and housing associations.

▶ INFRASTRUCTURE

Physical and digital infrastructure are required in Brent to support sustainable population and business growth, maintain peoples' wellbeing, and to enhance the competitiveness and attractiveness of the borough as a place for its residents, businesses and entrepreneurs.

TOP TRENDS

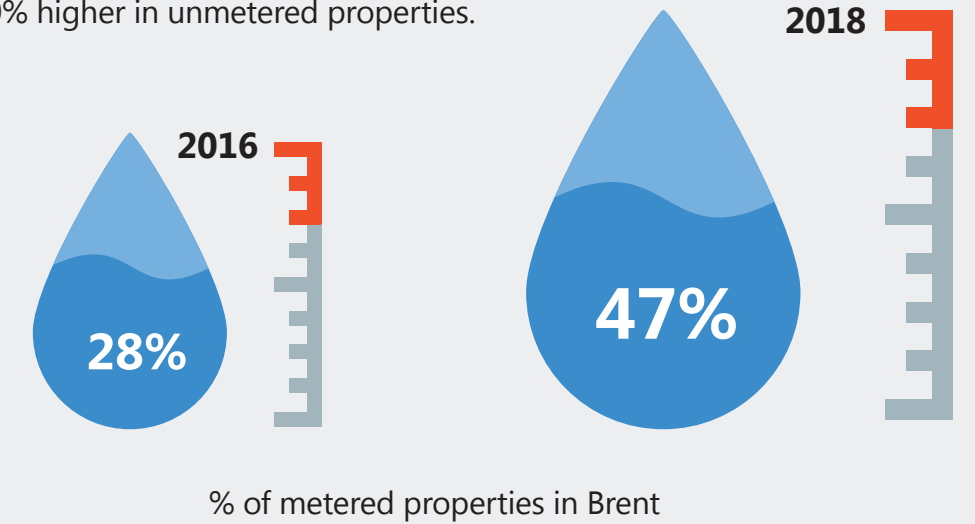
INCREASED DEMAND FOR PUBLIC TRANSPORT

Brent's growth will increase demand for an efficient transport system that connects housing, jobs and cultural facilities. Brent benefits from higher public transport accessibility, with the largest percentage of daily trips by public transport and one of the lowest for motorised vehicles amongst Outer London boroughs. Brent is well-connected to Central London, but poorly connected to the rest of Outer London, and to London Heathrow Airport, despite relatively close geographic proximity. Future Transport for London plans for the West London Orbital Railway and improved links to HS2, Crossrail and Thameslink will help to increase connectivity. Cycling has potential to realise almost 300,000 trips, versus the current 12,600 trips, in Brent. Poor road safety is a barrier to the take up of cycling. TfL analysis in 2017 identified Wembley, Cricklewood and Willesden Junction as areas with the 20% poorest safety records in London, based on the total number of collisions involving people walking or cycling. 7% of Brent's principal road network length was in poor condition in 2018.

GROWING WATER DEMAND

London's water supply is in deficit. Demand from an increasing population, and falling available supply due to climate changes, changes in bulk supply and third party

Water consumption in London and Brent is 30% higher in unmetered properties.



abstraction from the River Thames, means the gap is predicted to widen if no action is taken, with insufficient water to meet London's needs. At the same time, modelled sewer capacity for 2050 is at a critical level in some areas, including north and west parts of Brent, including Wembley, Brent's largest growth area.

In Brent, water consumption per capita is higher than Thames Water 125 litres per day (l/d) and London Plan 105 l/d standards. Latest data does however indicate daily annual water consumption per capita fell from 152 l/d to 139 l/d for households in the LB Brent District Meter Area between 2016 and 2018, with the increase in domestic property metering from 28% to 47% over the same period considered the main driver for the fall. In 2018, water consumption in London and Brent is 30% higher in





unmetered, compared to metered, domestic properties. London must reduce water consumption to remain sustainable. SMART water meters can help to increase efficient water use, as well as identify leaks in pipes, and thereby prevent water waste in the borough.

SMART INFRASTRUCTURE

SMART City strategies integrate big data understanding, physical infrastructure and digital infrastructure, to solve the city's challenges. SMART Cities aim to create a better environment for the future, deliver better and more effective capital asset management and resource efficiencies. Data can be utilised to inform and shape service provision in the borough.

Predictive modelling used in a number of local authorities across the country applies data mining and probability theory to forecast likely outcomes. Real and forecasted outcomes are used to identify potential issues and interventions to mitigate or seek to prevent negative outcomes. Brent is exploring the use of predictive modelling to better enable the early identification of vulnerable young people, to promote the use of earlier cost effective interventions and ensure better decisions are made each time a young person engages with services.

▶ ENVIRONMENT

Inclusive growth in Brent means finding sustainable solutions to provide adequate environmental resources and services to Brent's residents, minimising resource consumption and utilising resources as efficiently as possible.

TOP TRENDS

CLIMATE CHANGE AND CARBON EMISSIONS

Carbon dioxide (CO₂), is the most common greenhouse gas emitted by human activity and is now the main contributor to global warming and climate change. The UK's long-term target is to reduce at least 80% of carbon emissions by 2050 to maintain global average temperature at around 2°C above pre-industrial levels. The Mayor's carbon emissions target is 60% by 2025, with the aim to achieve a zero carbon city by 2050. There will be an increased focus on decarbonisation of homes and workplaces, and the development of clean and SMART energy systems using local and renewable energy resources. The UK is the world's 8th largest emitter of CO₂. Brent is responsible for 0.3% of national CO₂ emissions and 3% of London CO₂ emissions. In 2016, approximately 44.4% of all energy was consumed in people's homes, 32.6% in industry and commerce and 22.9% in transport. In order to deliver zero carbon in Brent by 2050, a transformation in the energy mix will require energy consumption from renewable sources to increase by 500%.

Public transport is the third largest contributor of NO_x emissions in Brent. To fully achieve London's decarbonisation target, the Mayor plans a zero emission transport network by 2050. This plan includes electrifying all rail lines and new energy-efficient trains with on-train management systems and regenerative braking, plus a policy shift to encourage active forms of travel.

RESPONSES

SUSTAINABLE TRAVEL AND MODAL SHIFT

Support a modal shift to more active forms of travel by taking steps to enhance road safety and decrease road congestion and pollution.

INFLUENCE & LEADERSHIP

Raise Brent's profile and influence in lobbying government and working with providers and partners to develop infrastructure vital to support growth in the borough.

WATER DEMAND

Reduce water demand by developing greater resident awareness of conscientious water usage and work closely with Thames Water to gain a better understanding of local water demand and consumption patterns.

WATER CAPACITY

Work with partners to improve water and sewer capacity, to mitigate against flood risk and reduce likelihood of critical issues.

ENERGY EFFICIENCY

Maximise energy efficiency in all new developments and where practicable retrofit existing properties to a high standard of sustainability, and promote behavioural changes in residents to reduce energy consumption.

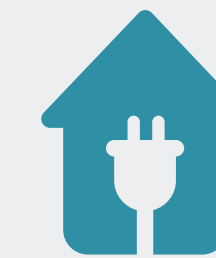
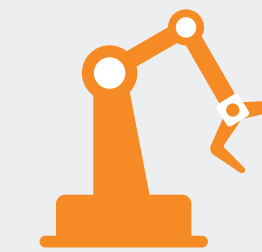
RENEWABLE ENERGY AND ENERGY INFRASTRUCTURE

Lead by example to invest and promote renewable energy infrastructure on its assets, local energy networks and district heating in major regeneration areas, and by engagement with partners to secure private investment in renewable energy.

Transport
22.9%

Industrial
32.5%

Domestic
44.4%



Energy Consumption by Sector

LOW CARBON CIRCULAR ECONOMY

The current low carbon circular economy model has shown positive impacts to London, with scope for further improvement, particularly reducing environmental impacts. The circular model builds economic, natural and social capital. Innovation to the current model includes increasing emphasis on reducing carbon emissions through the use and reuse of resources before they become waste; including the manufacture of goods to higher quality standards.

Brent has one of the highest employment rates in the circular economy, compared with other local authorities in London, at 2,415 jobs. More than 70% of the circular economy jobs in Brent are in waste collection and processing, and transport. With the potential to include more industries in this model, and projected growth in the

▶ HEALTH

RESPONSES

PROMOTE THE CIRCULAR ECONOMY

Encourage growth in the circular economy model to reduce negative environmental impacts. The Circular economy can be developed in a number of ways including increasing local employment, reducing waste and establishing clean tech hubs in industrial locations.

GREEN AND BLUE INFRASTRUCTURE

Utilise and develop the use of green space to deliver environmental benefits and meet targets.

SMART TECHNOLOGY

Leverage public assets to unlock investment in digital infrastructure through partnerships with businesses within the technology industry following the SMART city model.

circular economy across London, there is potential for 2,000 new jobs in Brent by 2036. Old Oak and Park Royal are identified as having potential to develop SMART and sustainable districts.

GREEN INFRASTRUCTURE

To ensure access to green space for a growing population, green and blue infrastructure in Brent must be protected from urban development, and the quality of space must be improved.

Improved green space would have positive spill-over effects on other areas of environmental significance, such as air pollution. Given limited land availability and pressure for new housing, planning, design and provision of new open space in new development will become increasingly challenging.

An ageing population, changing patterns of disease – with more people living with multiple and complex long-term conditions – and rising public expectations mean that changes are needed to the way health services are delivered.

TOP TRENDS

HEALTH INEQUALITY

Health inequality in Brent shows an almost 9-year difference in life expectancy across wards. Causes of health inequality are largely outside the scope of those who deliver healthcare, with risks heightened by individual behaviour (smoking, diet, exercise) in the context of societal influences (housing, schools, employment) and environmental factors (air quality, physical environment).

Various trends are projected to create further health inequalities in Brent. Demographic changes will have an impact, with the ageing population increasing the number of people vulnerable to cold weather and fuel poverty, and presenting the risk of increased winter deaths and illnesses.

The recent trend of increasing levels of insecure work driven by globalisation and technological development is also expected to continue moving forward. Inequality in employment is therefore expected to increase into the future, and to be compounded by increased living costs and wage stagnation, with potential negative knock-on effects upon mental health, poverty and quality of life.

INCREASE IN OBESITY AND DIABETES

Obesity is one of the most pressing issues in Brent in 2018, 56.4% of adults (aged 18+) were classified as overweight or obese. Obesity is often the result of a combination of a lack of physical activity and unhealthy eating, and strongly influenced in the early years. It is particularly worrying to see child obesity levels that are the highest



Kenton **87.7%**

Stonebridge **79.2%**

in London. Moreover, the rate of obese children per age segment increases between Reception and Year 6.

Diabetes is predicted to grow to 13.6% in Brent by 2035, driven by the potent mix of an ageing population, high levels of obesity, and the BAME population's predisposition to the disease. Diabetes accounts for 10% of the NHS budget and 80% of costs are due to complications.

RISE IN MENTAL HEALTH ISSUES

Brent has a higher than average level of prevalence of severe mental illnesses. The incidence of psychotic mental disorders i.e. schizophrenia, affective disorders with psychotic symptoms, is high compared with both other areas in the UK and in Europe, in particular among some migrant and minority ethnic groups, around five times higher in Black Caribbean vs. White British populations. One in eight (12.8%) children and young people aged 5-19 had a mental disorder in England in 2017.

Mental health remains the single largest cause of morbidity within Brent, affecting one



quarter of all adults at some time in their lives. 10.9% of respondents to 2016/17 Brent GP patient survey reported having some form of depression or anxiety, lower than the level for London and for England.

Social isolation can also have negative effects on mental health. There were more than 30,000 single-person households in the 2011 census, out of which 29% were aged over 65 years old. At the same time, only 39% of adult social care users reported that they have as much social interaction as they would like.



► CULTURE

Brent is London's Borough of Culture in 2020. Home to Wembley Stadium, Ealing Road, Kilburn and a number of areas with unique cultural heritage. To maximise the benefits that culture brings to the borough, Brent must consider its current cultural resources, projected future needs, challenges and opportunities, and use these findings to inform future policy and planning.

RESPONSES

TARGETED PREVENTIONS & INTERVENTIONS

Encourage healthier lifestyles and partner delivery of tailored health measures to take a preventative approach to health problems, better manage the cost and impact they have in the borough, and provide a better service.

INDEPENDENT LIVING AND SELF CARE

Ensure that older people and those with additional needs have the opportunity to live independently for as long as possible.

ENCOURAGE THE USE OF TECHNOLOGY

Use technology to improve efficiency, reduce cost and drive up standards in the health care sector.

CREATING HEALTHY ENVIRONMENTS

Support restaurants, workplaces, schools and other places where residents are spending time to ensure they are designed and run in a way which promotes good health outcomes.

SOCIAL PRESCRIBING FOR WIDER DETERMINATES OF HEALTH

Support the use of preventative and community based non-medical responses to create the conditions to support people in adopting healthier lifestyles.

SUPPORT THE HEALTH SYSTEM

Brent will aim to make any changes in health provision as smooth as possible by supporting the change management.

TOP TRENDS

GROWTH IN CREATIVE ECONOMY

The total number of jobs in the Creative Economy in London are projected to increase from 5.6m in 2015 to 6.7m in 2041. Creative economy jobs, exports and GVA are all growing faster than any other sector. While up to 30% of jobs in London are at risk of automation over the next 20 years, 87% of highly creative occupations are considered at low risk. In 2015, 3.56% of jobs in Brent were in 'Arts and Entertainment', less than half the London level of 7.57%. In 2018 however, 6% of jobs were in 'Arts and Entertainment', compared to 7% in London, indicating recent growth in the creative industries in Brent.

Women, BAME and low socio-economic groups are currently underrepresented in the creative industries. This is unlikely to improve in the short term as, since 2010, the number of students taking arts subjects at GCSE in London has dropped almost 30%, due to the introduction of English Baccalaureate and Progress 8, as well as lack of funding. There is however growing acknowledgement from the Mayor of London that more must be done to encourage participation in the arts.

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GROWTH IN TOURISM

Demand for land for development could result in loss of cultural facilities and creative workspaces, as well as increases in commercial rents and business rates.

London is the 3rd most visited city in the world and tourism and international visitors contributed £13bn across London's economy in 2017. Key tourist attractions in Brent include Wembley Stadium, Wembley Arena, BAPS Shri Swaminarayan Mandir and the Kiln Theatre (formerly the Tricycle Theatre). In 2018, 70% of serviced accommodation was located within inner London, while 1.7% was located in Brent. As the borough is well-connected to central London by public transport, Brent has the potential to expand its offer. While most visitors to London currently stay in Zone 1 there is evidence of a growing appetite for an authentic offer, to "live like a local and discover the hidden gems". Both trends provide an opportunity for Outer London boroughs to absorb some of the growing demand for an authentic cultural experience.

HIGH STREETS DIVERSIFICATION

High Streets continue to struggle even though 47% of businesses outside Central London are on a High Street and 1.45 million employees work on or within 200m of a High Street. All Brent's High Streets lie within Town Centre boundaries, with Wembley High Road and Kilburn High Road within the boroughs two major Town Centres. High Streets provide vital local services and a range of workspaces with diverse tenure options to meet the needs of both established business communities and newcomers.

The high turnover of shops reflects on the one hand the precarious nature of the High Street, and on the other that shops are often a stepping-stone into the formal economy. The provision of opportunities for new uses on the High Street will include new spaces for the creative and cultural industries and the arts. Brent's overarching strategy is to promote and support the diversification of uses on the High Streets and Town Centres to support their regeneration and retention as economic and community hubs.



RESPONSES

CULTURE ON THE HIGH STREETS

Make high streets a gathering place for social interaction and cultural exchange.

FACILITATE TOURISM GROWTH

To promote tourism in Brent relevant partners should work together to formulate a strategic vision for tourism in the borough.

SUPPORT CREATIVE WORKSPACES

Enable artists to have access to a range of workspaces in the borough, from smaller studio and shared workspaces, through to medium and larger move on spaces.

LONDON BOROUGH OF CULTURE 2020 LEGACY

Create a legacy from the London Borough of Culture 2020 award, building on successes and driving forward the cultural life of the borough.

CELEBRATE CULTURAL SPACES

Celebrate Brent's heritage and cultural infrastructure and encourage businesses and other relevant parties to celebrate and promote culture in the borough.

FLEXIBLE CULTURAL OFFER

Encourage the growth of Brent's 24 hour economy and promote more flexibility in leisure opening hours and offers.





Brent