Brent Inclusive Growth Strategy (IGS): Culture

2019-2040

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Executive Summary

Over the next 20 years, Brent is expected to accommodate significant population growth and witness continuing demographic shifts. 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.

For the purpose of this strategy, culture includes arts, festivals, libraries, heritage, creative employment and education, design of the public realm, sport and community identity.

The culture theme examines the demographics and community resources within Brent to identify areas where cultural needs are well served and should be maintained, as well as gaps where there is room for improvement. It also considers the current situation for creative education in Brent and London, as well as three areas which are projected to experience significant growth; the night-time economy, tourism, and the creative industries.

The progression towards partnerships between cultural organisations, health and social agencies necessitates a discussion about how culture is used to improve physical and mental wellbeing. The shifting use of digital technology in the cultural sphere is also considered.

Baseline scenario main findings for Brent which are related to the provision of culture include:

- Brent is one of the most ethnically diverse boroughs in the borough. 66.4% of the population are from BAME groups. By contrast, 14% of people in England and Wales and 40% of people in London were BAME.
- In 2018 52% of Brent residents were born outside the UK. Significant immigrant populations within the borough include Sri Lankans, Somalians, South Americans and Kenyans. The first of these three groups have grown since 2001.
- 149 languages are spoken in Brent. The national census revealed that English is the main language in 57% of Brent households. This is the second lowest rate for any borough in England and Wales. The proportion of households where no one is able to speak English varied by ward and is highest in Alperton and Wembley Central.
- In 2018 the median gross full time weekly pay in Brent was £575. Within London, Brent ranks as the second lowest borough in terms of median gross weekly income, the only borough with a lower amount is Barking and Dagenham with £571 per week.
- As London borough of Culture 2020, Brent committed to establishing an independent Cultural Trust to oversee the borough's cultural programme, and a long-term learning programme to stimulate schools to place culture in every classroom. Brent will also launch Spacebook – 'an all-year round online calendar listing affordable available spaces throughout the borough that are bookable, affordable and accessible for all kinds of cultural activities'.
- The GLA published a Cultural Infrastructure Plan in 2019, which provides the first London-wide evidence base of cultural infrastructure, identifying cultural places and spaces and flagging culture at risk. To accompany the Plan, GLA has produced an open source map to which Londoners can add cultural assets and experiences.
- Compared with other Local Authorities Brent has one of the lowest numbers of libraries. However, the total opening hours per branch are proportionately higher, providing the opportunity for more intensive use.
- Brent has one of the lowest rates of participation in sports in London, and is below the national average. Rates are particularly low amongst the BAME and lower socio-economic groups.
- There are around 200 Locally Listed buildings in the borough. The list was last updated in 2004. None of these buildings outside conservation areas are protected from demolition because they are not covered by Article 4 directions.

- There are 22 conservation areas in Brent and the last survey was undertaken in 2004.
- Brent has one dedicated theatre in Kilburn and a 100-seat performance space at Willesden Green Library, which is also home to a museum and art gallery. Temporary use has been granted for the 1000-2000 seat Troubadour theatre in Wembley until 2025, but after this date Brent will be without a large scale theatre.
- Tourism accounts for 11.6% of London's GDP and 1 in 7 jobs. Brent is well placed to take advantage of a growing appetite for local authentic tourism.
- Key attractions in Brent currently include Wembley Stadium and Arena, BAPS Shri Swaminarayan Mandir, the Kiln Theatre, the Ace Café and Ealing Road. Potential areas for promotion include niche retail offers such as Ealing Road, the night-time economy in Kilburn and the historical popularity of reggae in Harlesden.
- Brent has good public transport links into central London including the weekend 24-hour Jubilee line.
- The creative industries bring £42 billion to London's economy every year and account for 16.9% of London's jobs.
- Over half of UK workers (57%) work extended hours, part time, flexibly or on a shift pattern. As people seek to pursue their leisure and relaxation at different hours, many services have to yet to catch up. It is calculated that the total potential out-of-hours opportunity for the leisure sector is an extra £6.75bn of revenue.

Anticipated cultural trends are considered within the context of a growing and ageing population, and Brent's draft New London Plan target to build 2,915 homes a year. The trends inform the Responses section, which outlines policy options to maximise the benefits culture can bring to Brent and its residents in 2040. Brent is supportive of the Mayor's aim for more people to experience and create culture on their doorstep by widening the range of cultural activities and communities reached, and the policy options seek to further these ambitions.

The key trends which are expected to affect culture in Brent are:

1. Ageing Population
2. Development Pressures on Cultural Spaces
3. High Streets Diversification
4. Growth in Night-time Economy
5. Growth in Tourism
6. Growth of the Creative Economy
7. Growing Demand for Workspaces
8. New Technologies
9. Changing Leisure Consumption Patterns

The culture theme of the IGS should be read in conjunction with the other themes, reflecting Brent's commitment to a fully integrated and multidisciplinary approach to future designs and plans for the borough.

Introduction

As we look at Brent's cultural life moving forward to 2040, the borough is well-positioned to take advantage of the growth forecast for London's night-time and creative economies, as well as the upturn in tourism and potential growth in income from a greater flexibility in working patterns. Harnessing these opportunities will enhance the borough's economic resilience and increase its offer to residents, businesses and visitors. Of equal importance will be ensuring that everyone, no matter their background, has the opportunity to take part in the broadest possible cultural life; whether that is going to the theatre, busking, taking part in a free sports class, or enjoying the local heritage in their neighbourhoods.

Alongside increasing access to cultural experiences, the borough can assist in enabling citizens to create and articulate their own cultures. New digital technologies and online networks have seen a massive increase in people exploring their talents in an informal way. Brent can use its policies and powers to help people make and share their own creativity through facilitating access to physical spaces and supporting community partners who link people together.

Central to the question of the borough's cultural future will be the composition and characteristics of its residents, now and in the future. This strategy includes an overview of the demographic make-up of the borough and its community resources. The responses section at the end of the report includes suggestions as to how to increase cultural participation levels amongst lower socio-economic groups and BAME people, as well as increasing diversity within the creative economy. There is however, recognition of the importance of appropriate metrics to assess how the borough's cultural infrastructure is meeting peoples' needs. While data on physical infrastructure and quantitative participation rates is valuable, we need to assess how our residents value and experience the cultural offer around them. The borough should employ more qualitative methods to capture such data, including feedback questionnaires and interviews with residents.

One of the biggest challenges to cultural life in Brent in the next 20 years will be the development pressures on community spaces. Non-cultural uses of land such as housing frequently command higher land values and the demand for such uses is set to continue. The responses section contains a mixture of traditional and novel means to address this pressure: from using planning regulations to protect and plan for community facilities, to more creative solutions such as legal art walls, open air cinemas and markets in the parks. As part of the night-time economy, it is hoped that more basements can be used for in bars, restaurants or small music venues in key locations. Brent is also getting ready to launch Spacebook - an all-year round online calendar listing bookable, affordable, accessible spaces for various cultural activities, which should do much to support informal, everyday culture.

One of the greatest opportunities economically for Brent is the growth in tourism, which is predicted to continue despite the referendum result to leave the EU. The borough is already home to Wembley Stadium and Arena, the Kiln Theatre, which has transferred multiple productions to the West End, BAPS Shri Swaminarayan Mandir – Britain's foremost Hindu Temple – and the Ace Café, which draws motorcyclists from around the globe. It can now take advantage of its great cultural diversity and the growing appetite for an authentic offer by for example, promoting Kilburn's musical heritage and longstanding Irish and Caribbean communities, Harlesden's links to reggae and Ealing Road's central place within the UK Asian community.

Brent can also benefit from the growth in the creative economy by continuing to work with schools to encourage creative education, securing affordable workspace and removing barriers faced by people from diverse ethnic and disadvantaged backgrounds through leadership and training initiatives.

This report is divided into three sections:

- The first section describes the current baseline information and context for culture within London and Brent, noting where further data collection would be useful
- The second section includes projected scenarios for key themes identified as particularly relevant for Brent and culture over the next 20 years: an ageing population, development pressures on cultural spaces, high streets diversification, the growth in the night-time economy, growing demand for workspaces and new technologies.
- The third section briefly suggests some policy responses to opportunities and challenges presented in this report.

Baseline

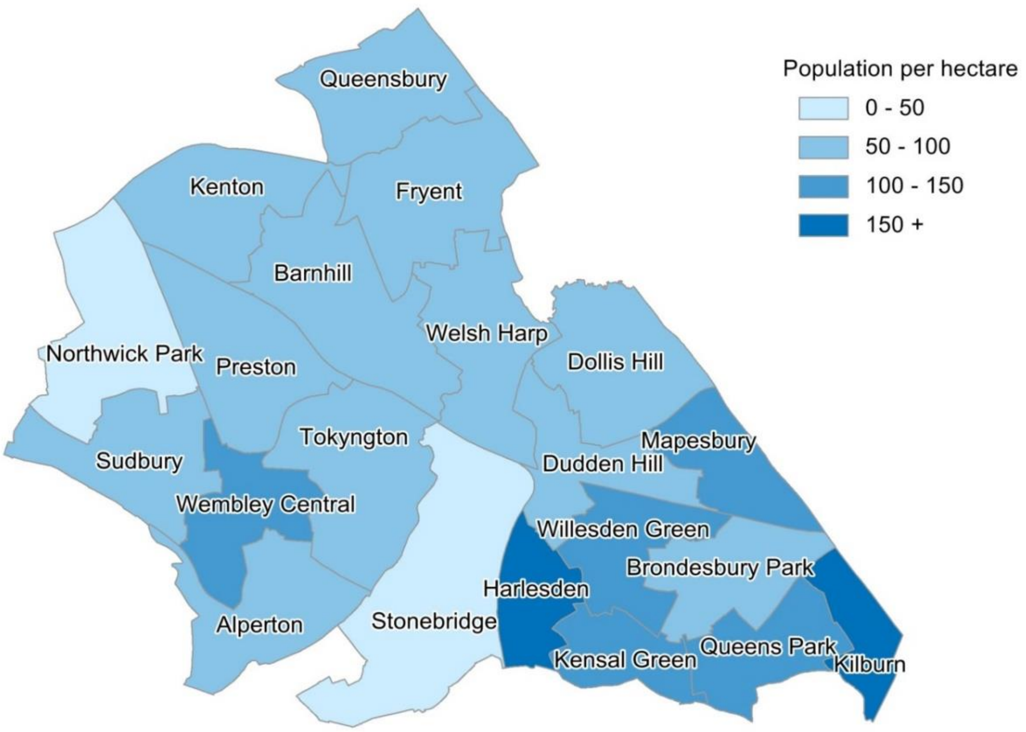
Demographics

Population and Urban form

Brent’s population has seen a substantial increase from 312,200 to 330,800 in the 2011-2018 period. This population growth varied widely across the borough – some wards grew by as much as 40%.

The GLA population estimates for 2017, show that the south east corner of the borough has the highest population density. This area borders central London boroughs including Camden, Westminster and Kensington & Chelsea.

Figure 278: Brent’s Population Density

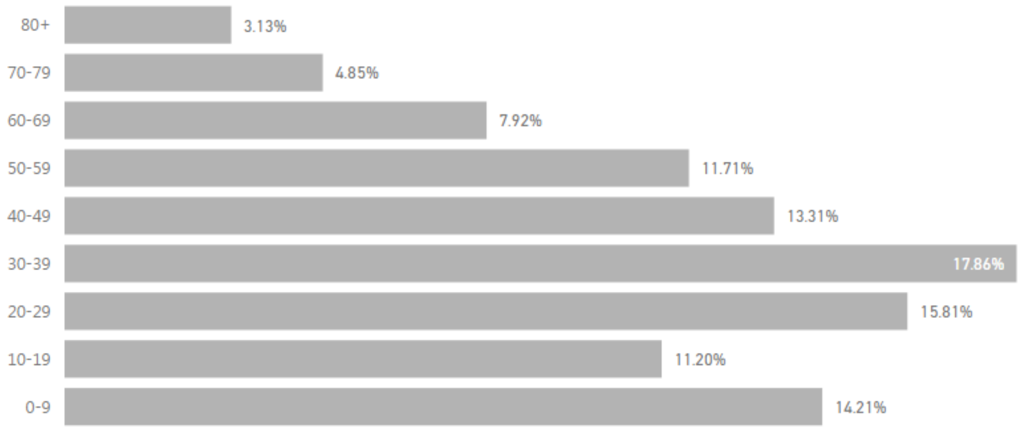


Source: GLA Population Estimates (2017)

Age

The 2011 census revealed that Brent has a young population. A quarter of the population are under 18 and a quarter aged between 30 and 44. 1 in 10 residents were aged 65 or over.

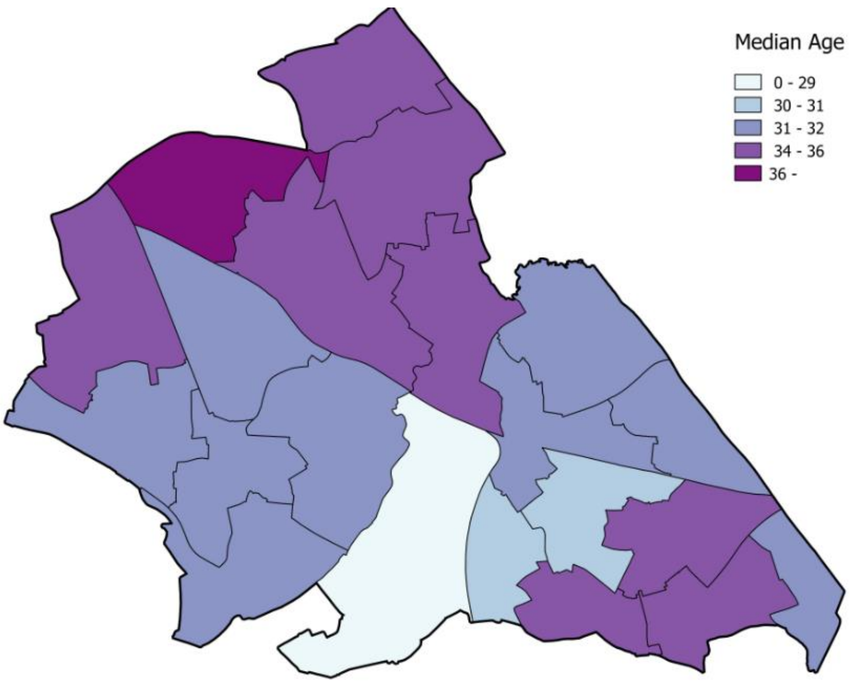
Figure 279: Brent's population by age as a percentage of total population



Source: GLA Population Estimates (2017

The age profile of Brent's population was similar to that of London, Brent's median age, 32 is just under the London level of 33. Stonebridge ward has the youngest median population and Kenton the oldest.

Figure 280: Brent's population by age as a percentage of total population



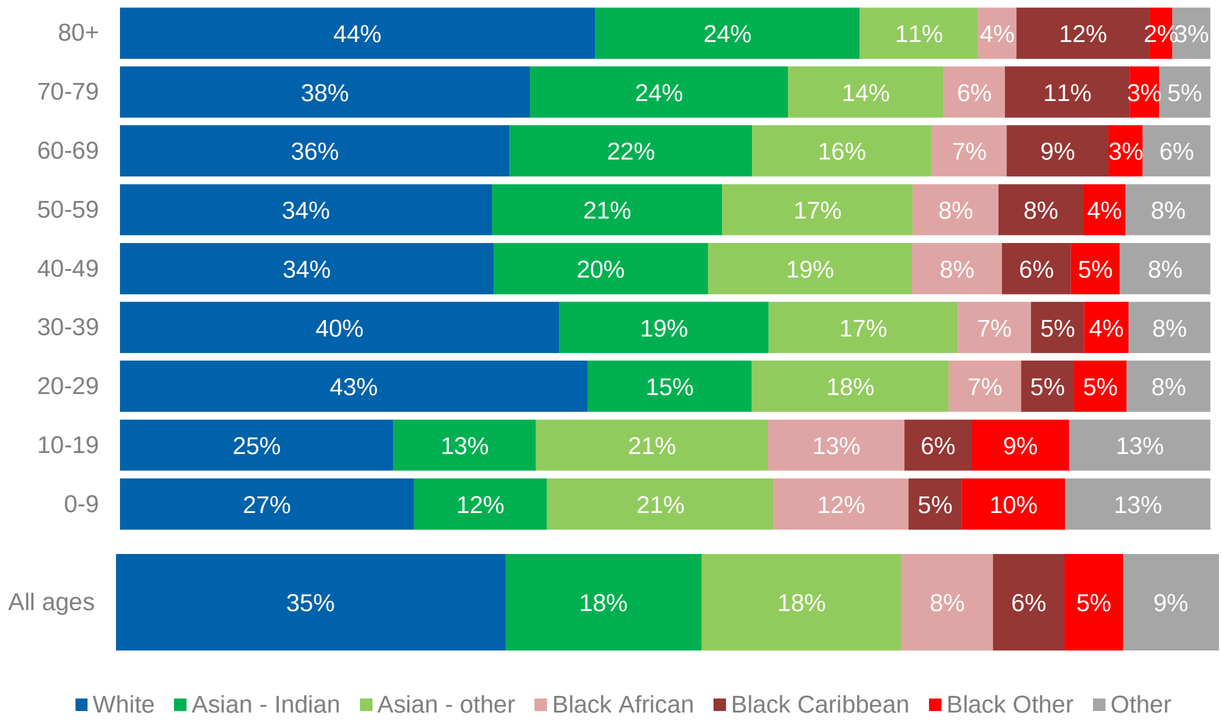
Source: GLA Population Estimates (2017)

Ethnicity

Brent is one of London’s most ethnically diverse boroughs, with 66.4% of the population belonging to different BAME groups, in comparison to 14% in England and Wales and 40% in London. The Indian ethnic group currently make up the highest proportion of BAME (19% of the population), followed by Other Asian (12%). The White group make up 33%[602].

GLA 2017 estimates shown below:

Figure 281: Age Groups and Ethnicity



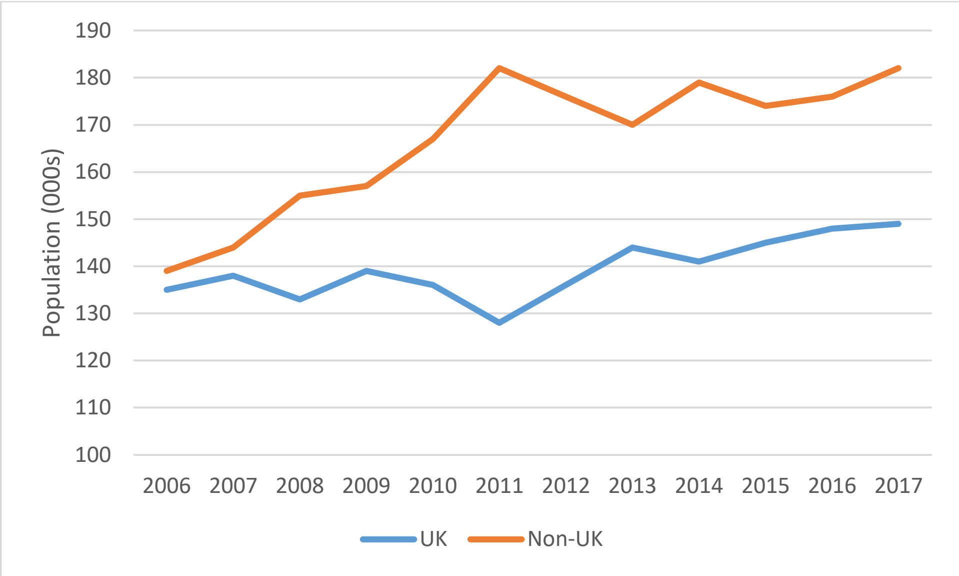
Source: GLA population Estimates (2017)

[602] JSNA 2015 Brent Overview Report

Immigration

Estimates show that from July 2016 to June 2017, 55% of Brent residents were born outside the UK. The chart below shows how the population has grown since 2006.

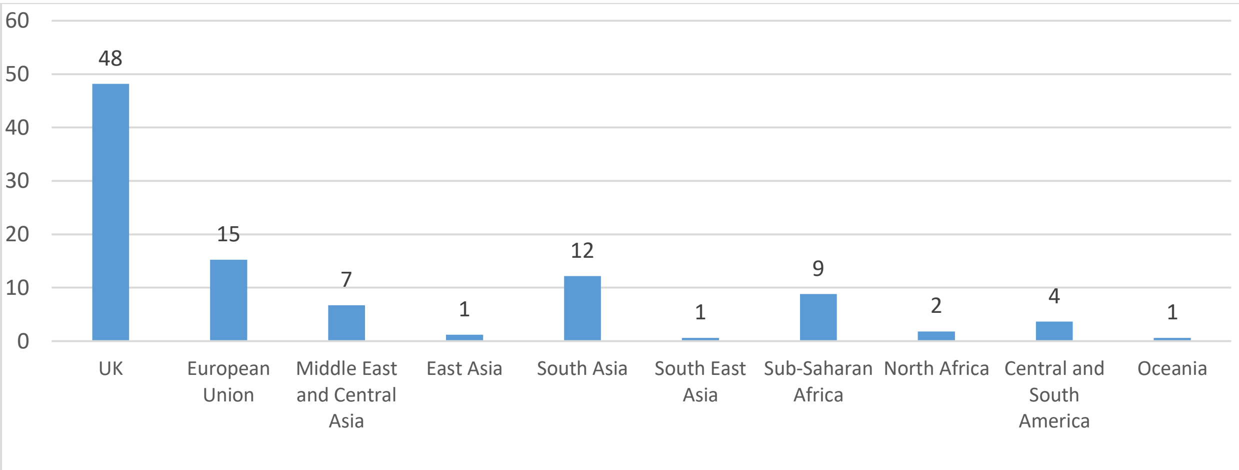
Figure 282: Brent's Population 2006-2017



Source: ONS Population of the UK by country of birth and nationality (2018)

Of the 55% of Brent residents who were born outside of the UK, the largest number were born in South Asia (15%), followed by 10% of residents who were born in Sub-Saharan Africa and 17% in the European Union.

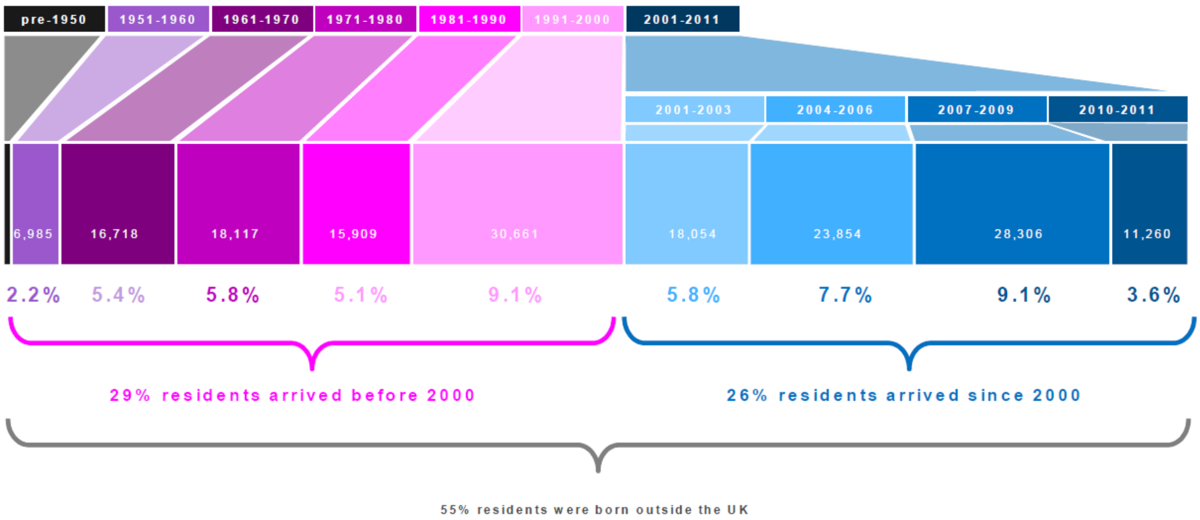
Figure 283: Brent's Country of Birth %



Source: ONS Population of the UK by country of birth and nationality Estimates (2018)

The graphic below illustrates that nearly half of the immigrant population in Brent arrived after 2001.

Figure 284: Timeline of Arrival in Brent



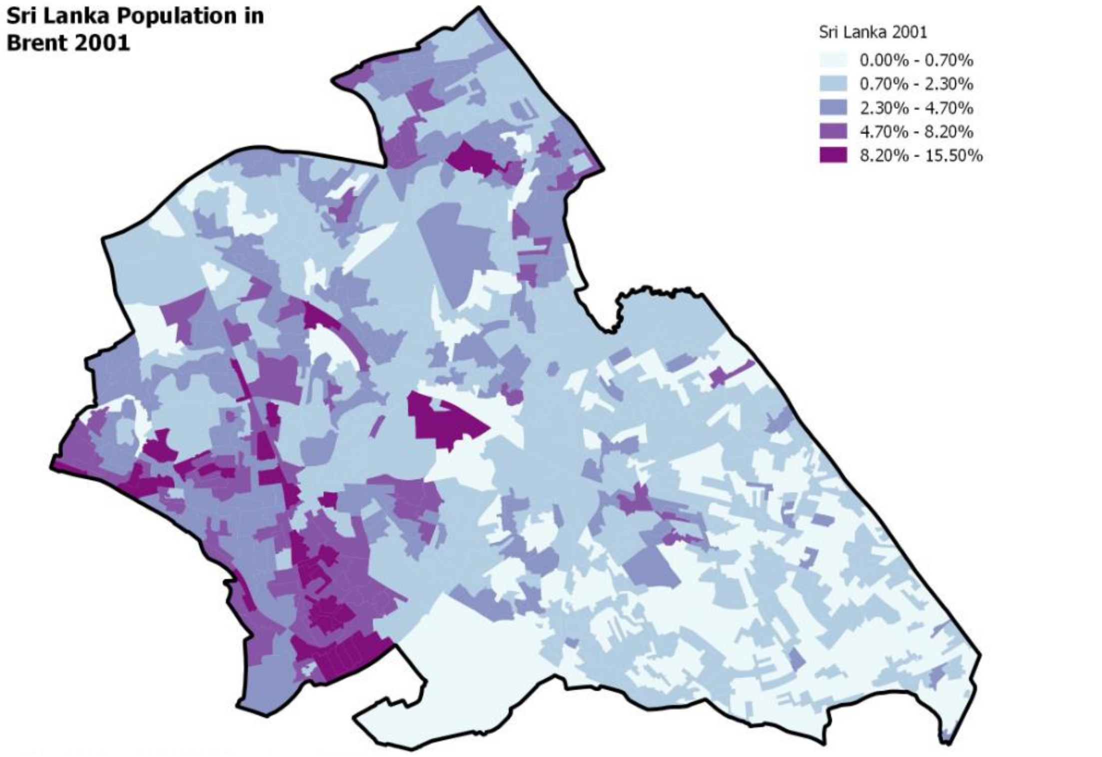
Source: Census (2011)

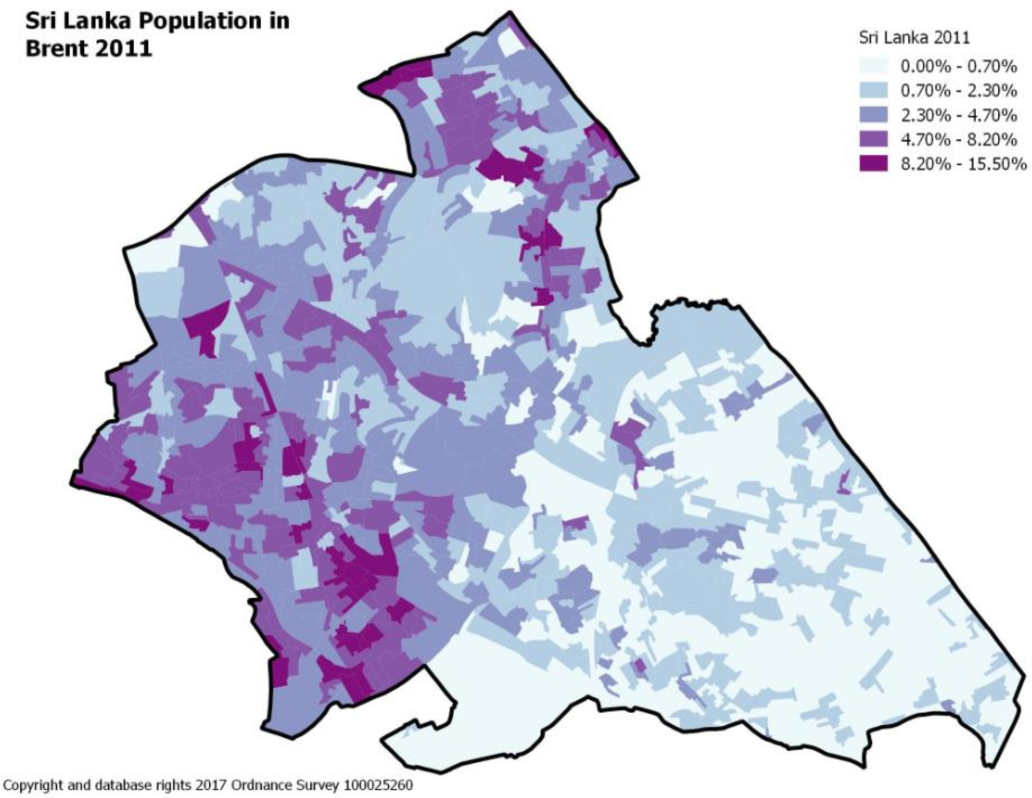
Significant immigrant populations within the borough include Sri Lankans (approx. 7,000) who tend to live in the north and west areas of the borough, a similar number of Somalians, who predominately live in Stonebridge and Harlesden, and ethnically Asian Kenyans, many of whom emigrated to the UK in the late 1960s and 1970s, post Kenyan independence, settling in the northern areas of Kenton and Queensbury. There is also a significant South American population in the borough, (approx. 5,000) who are estimated to be largely Brazilian.[603]

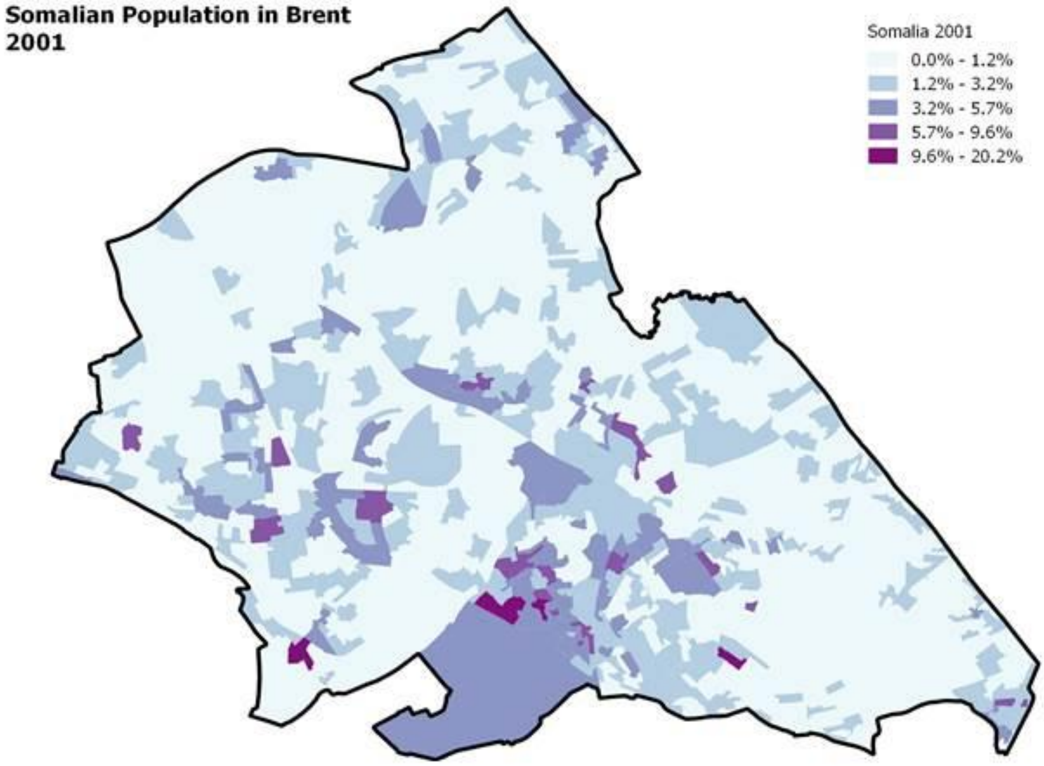
The following visual representations of population growth show that the Sri Lankan, Somalian and South American populations have all grown since 2001, while the Kenyan population has decreased.

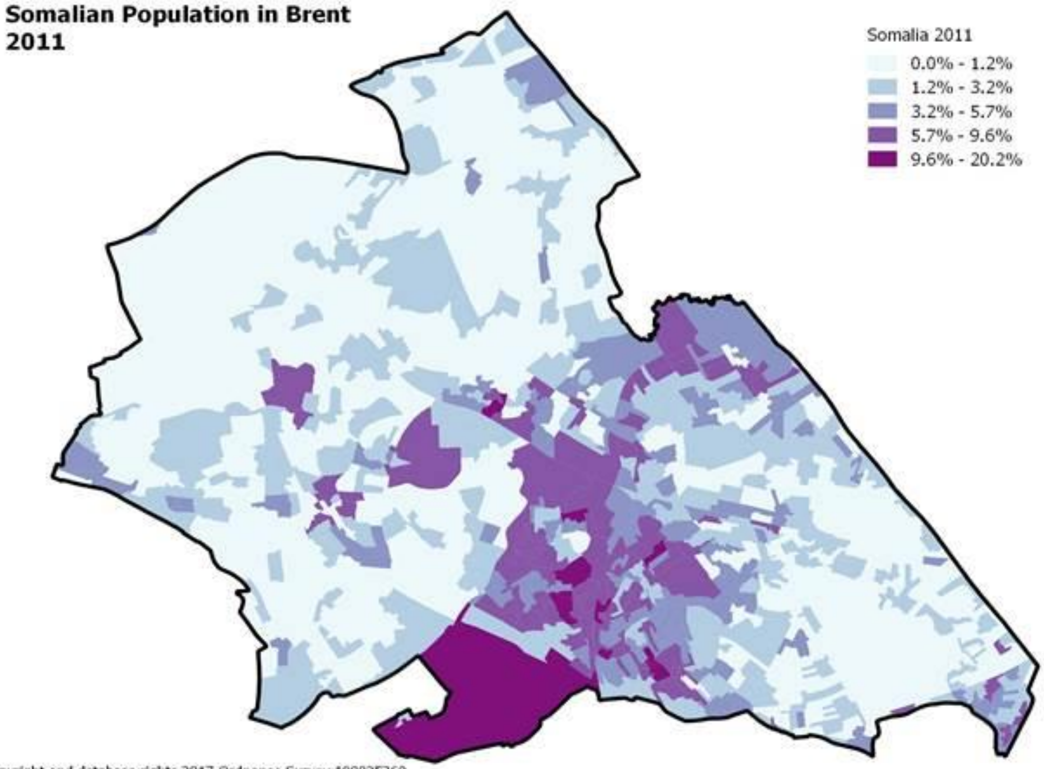
[603] Trust for London (2011) No Longer Invisible: the Latin American community in London

Figure 285: Brent Residents by Country of Birth

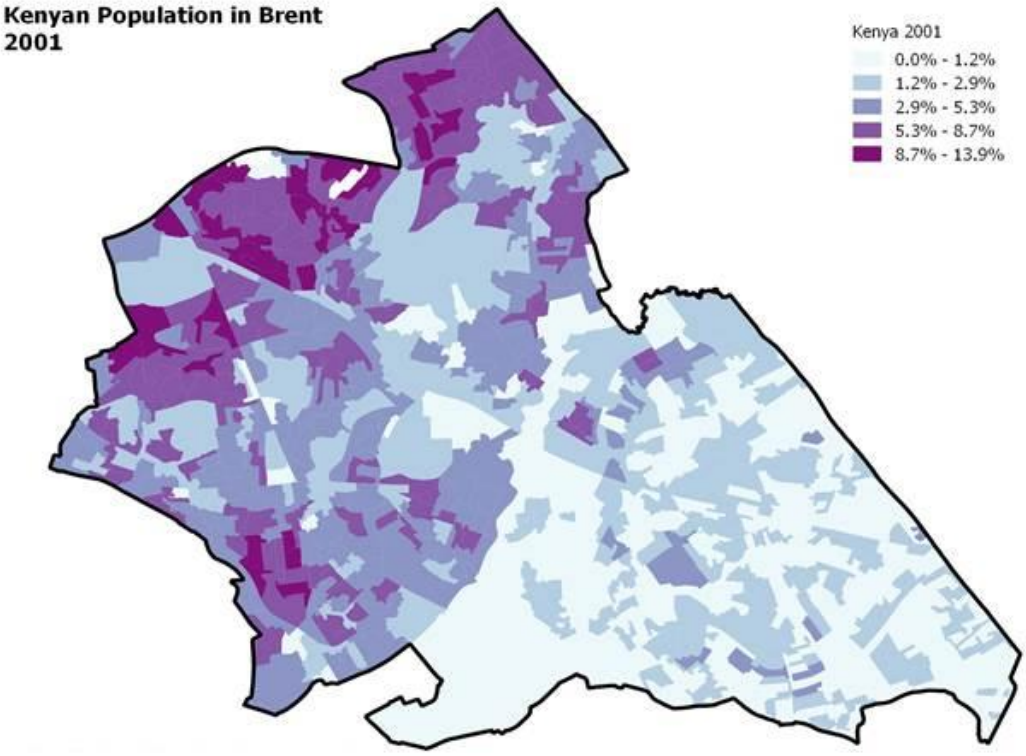


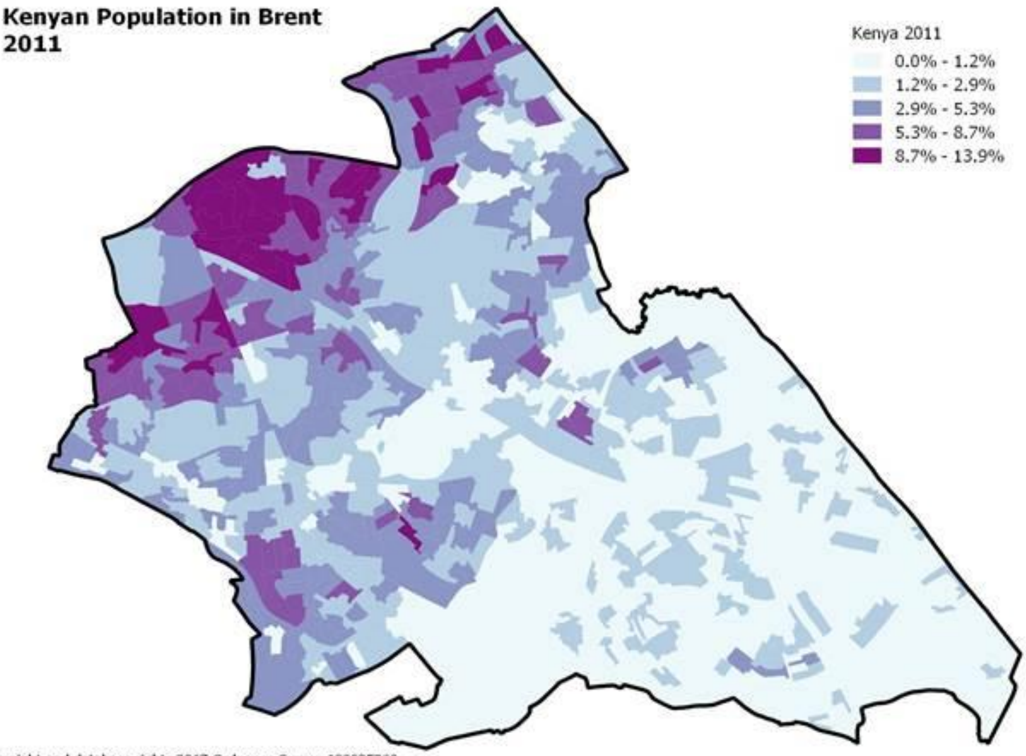



Somalian Population in Brent
2001
Somalia 2001
0.0% - 1.2%
1.2% - 3.2%
3.2% - 5.7%
5.7% - 9.6%
9.6% - 20.2%

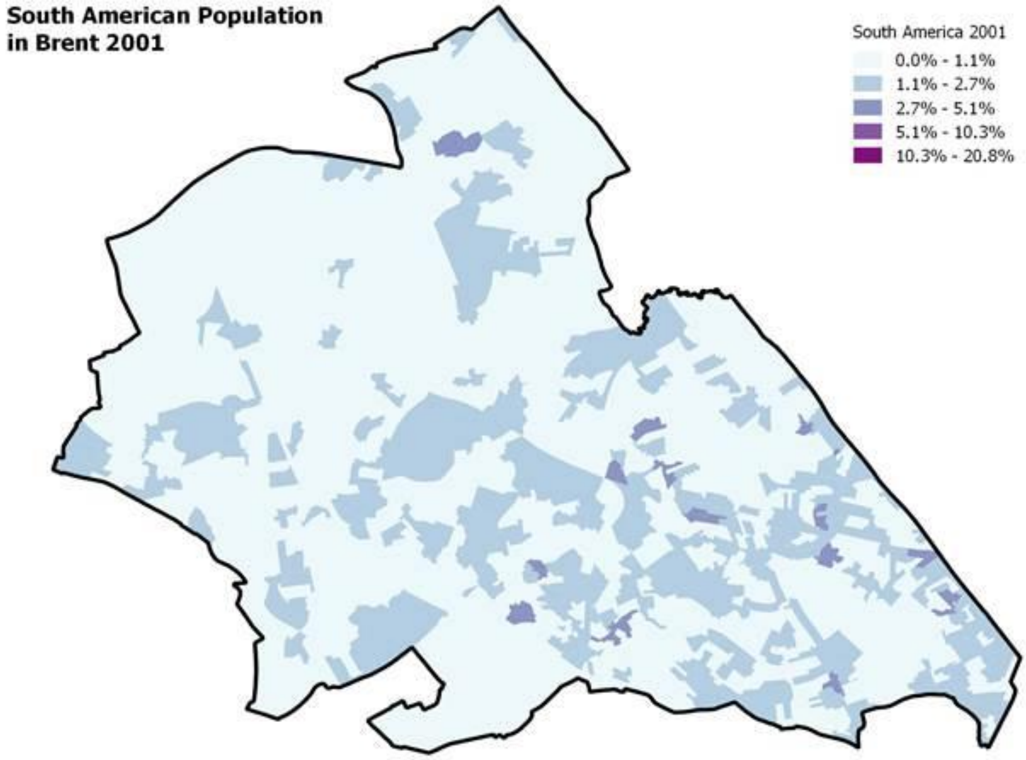

Somalian Population in Brent
2011
Somalia 2011
0.0% - 1.2%
1.2% - 3.2%
3.2% - 5.7%
5.7% - 9.6%
9.6% - 20.2%

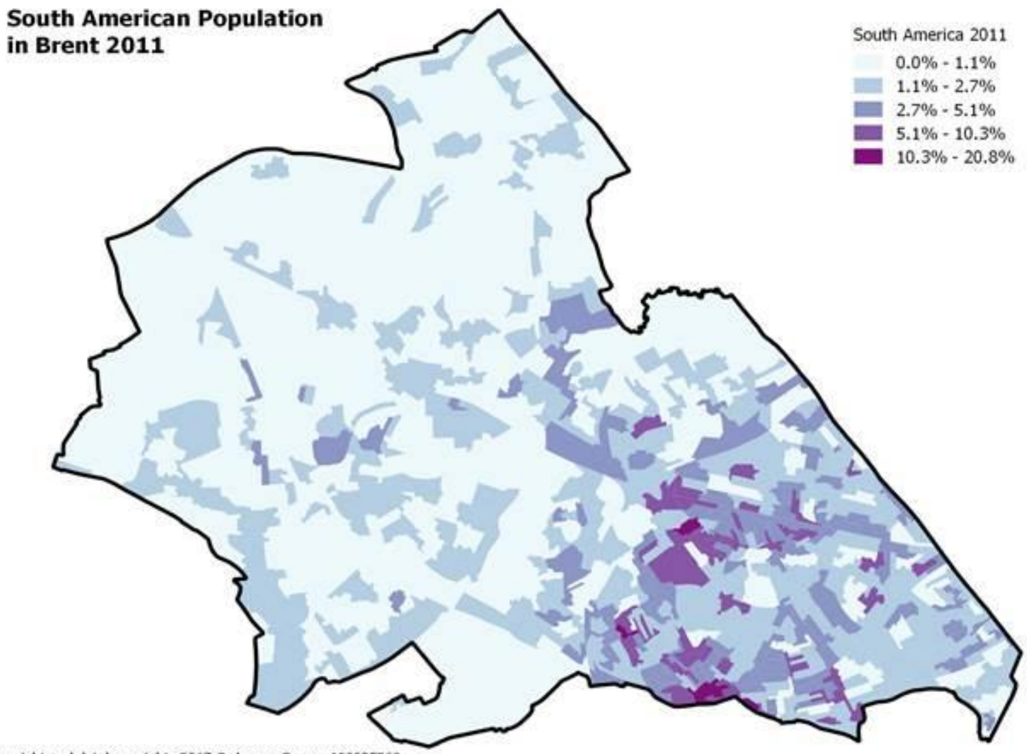

High
Low


Kenyan Population in Brent
2001
Kenya 2001
0.0% - 1.2%
1.2% - 2.9%
2.9% - 5.3%
5.3% - 8.7%
8.7% - 13.9%


Kenyan Population in Brent
2011
Kenya 2011
0.0% - 1.2%
1.2% - 2.9%
2.9% - 5.3%
5.3% - 8.7%
8.7% - 13.9%


High
Low



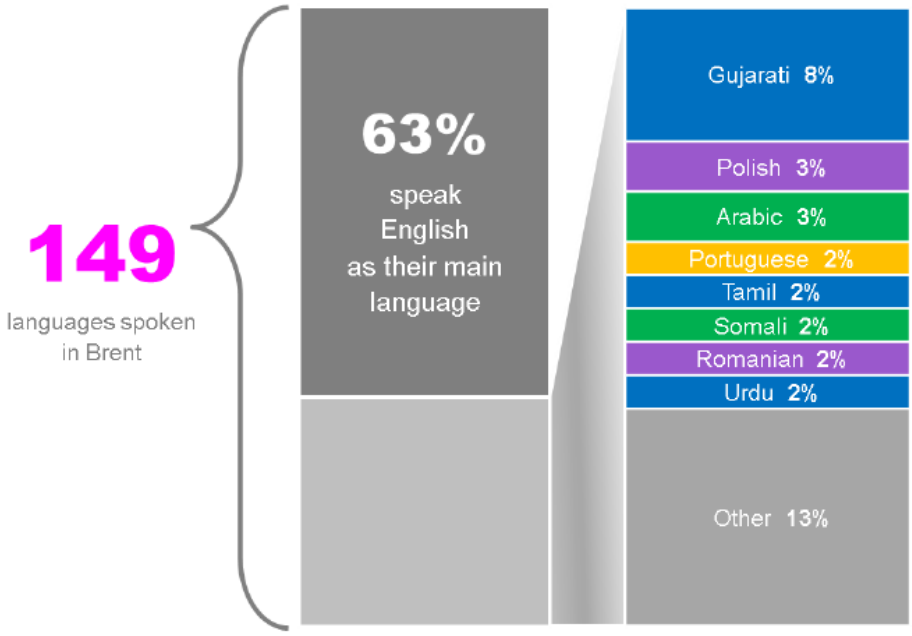


Source: Census (2001 & 2011)

Language

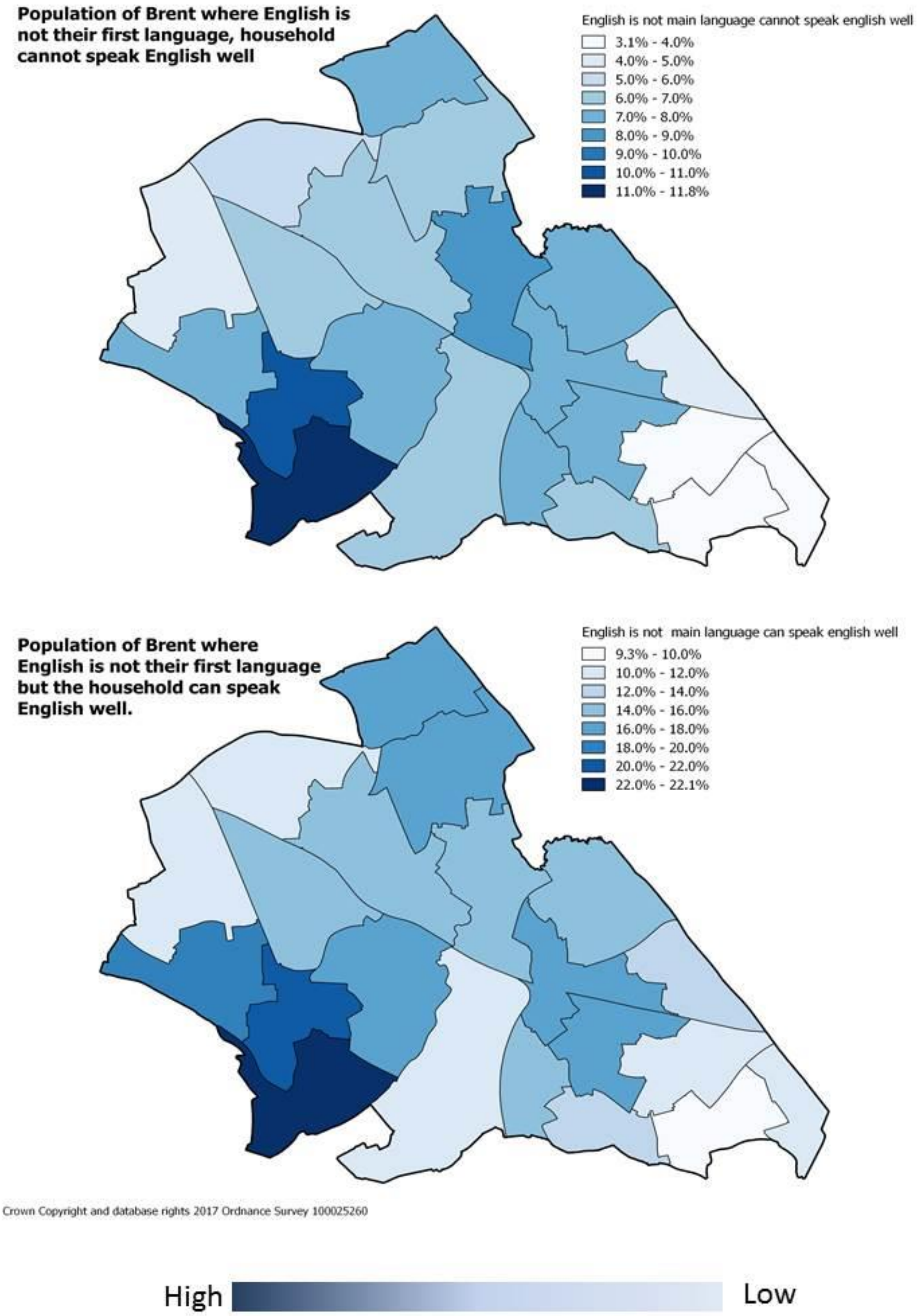
The national census showed that there are 149 languages spoken in Brent, and English was the main language in 63% of Brent households. This was the second lowest rate for any borough in England and Wales. The proportion of households where no one was able to speak English varied by ward and was highest in Alperton and Wembley Central.

Figure 286: Languages Spoken in Brent



Source: JSNA 2015

Figure 287: Brent residents – English is not main language / English speaking ability

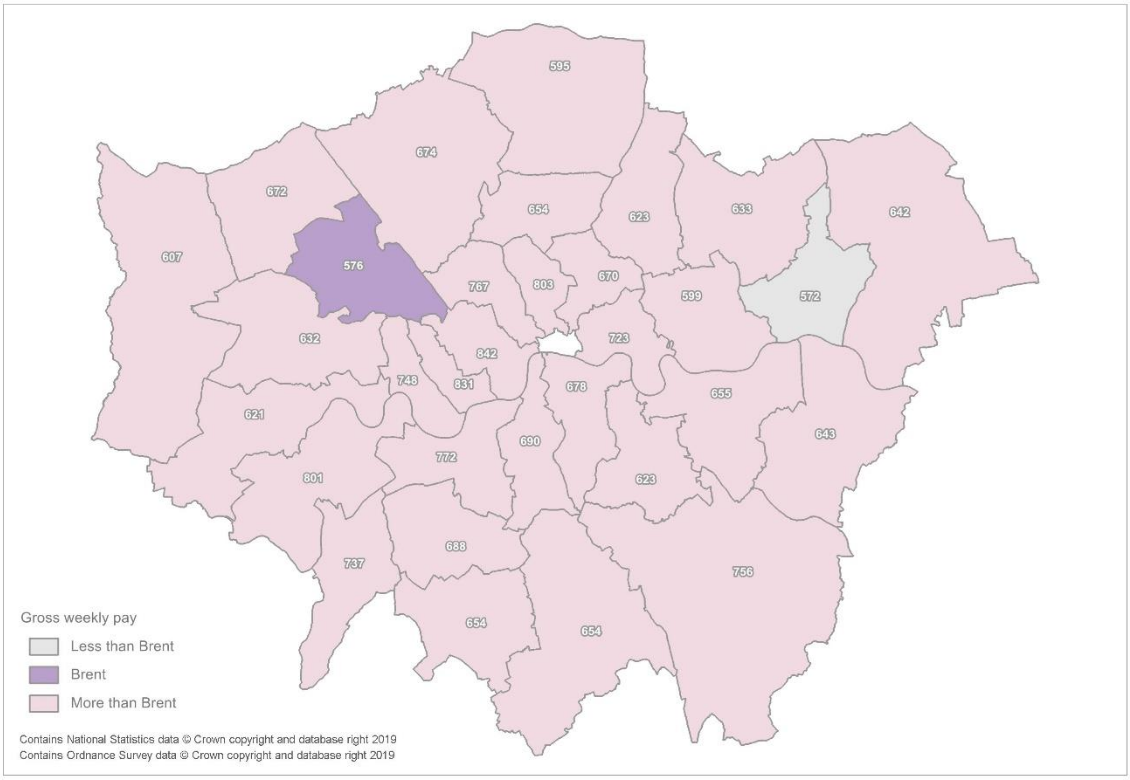


Source: Census (2011)

Income

In 2018 the median gross full time weekly pay in Brent was £575.50. Within London, Brent ranks as the second lowest borough in terms of median gross weekly income. Only Barking and Dagenham has a lower income at £571.50 per week.[604]

Figure 288: Boroughs with an Average Weekly Pay Lower and Higher than Brent



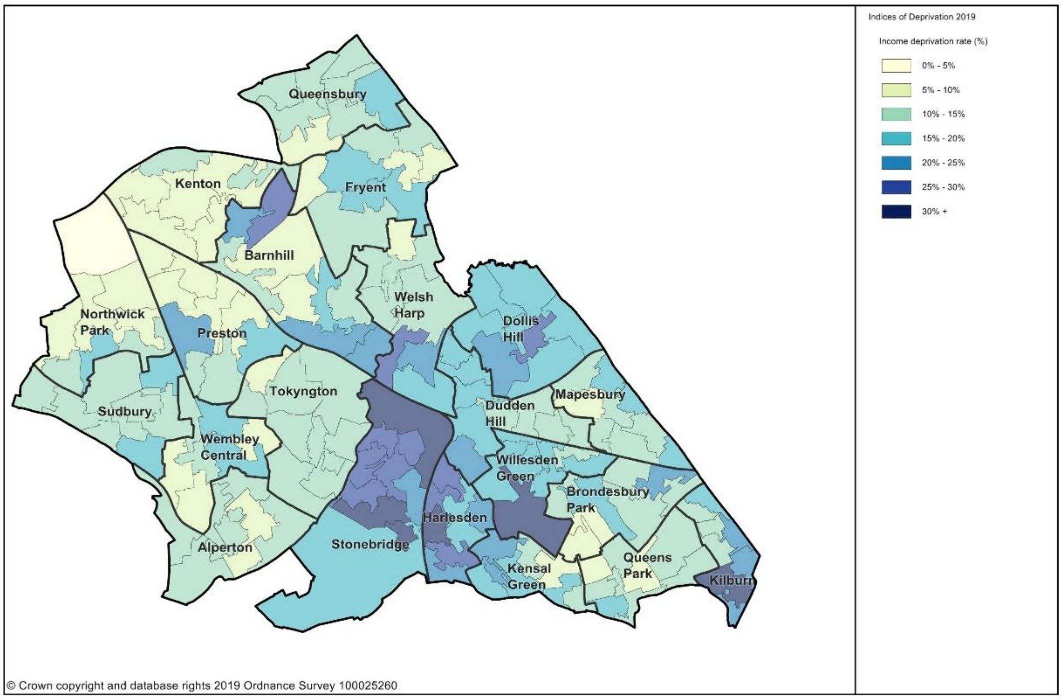
Source: ONS (2019)

The 2019 Indices of Multiple Deprivation show that highest deprivation levels in income are in Stonebridge and Harlesden. Income varies widely from ward to ward. Stonebridge has the lowest median household income (£25,800) and Queen's Park has the highest (£42,880)[605]. Higher deprivation levels in living environment are concentrated in the South East corner of Brent, including Willesden Green, Harlesden, Kensal Green and Kilburn.

Figure 289: Brent Deprivation in Income

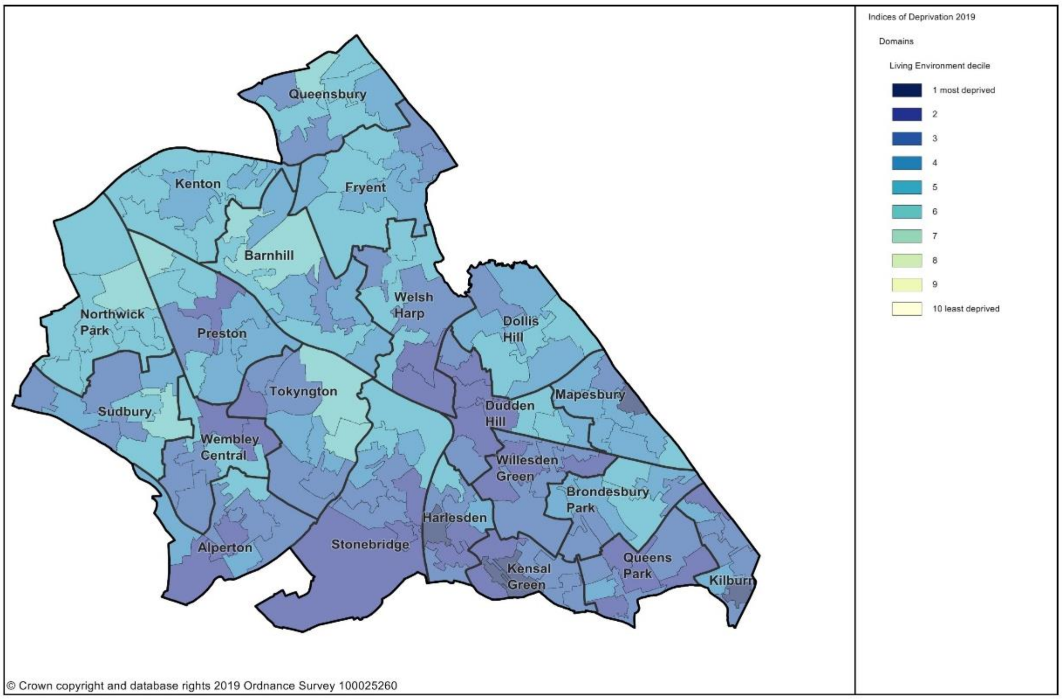
[604] ONS 2018 Annual Survey of Hours and Earnings

[605] Greater London Authority (2018) Modelled median Household income by ward. Accessed: https://data.gov.uk/dataset/5c4a083f-a8c6-42d8-ad40-36a9719a634c/household-income-estimates-for-small-areas



Source: ONS Indices of Multiple Deprivation (2019) GIS Mapping Service

Figure 290: Brent Deprivation in Living Environment



Source: ONS Indices of Multiple Deprivation GIS Mapping Service (2019)

Employment

Most groups in Brent's working population have lower employment rates than in the rest of London. Economic activity is 72.5% in Brent compared to 78.1% in London. The lowest rates are amongst the Pakistanis/Bangladeshis (55.7%). followed by the Black population (57.5%)

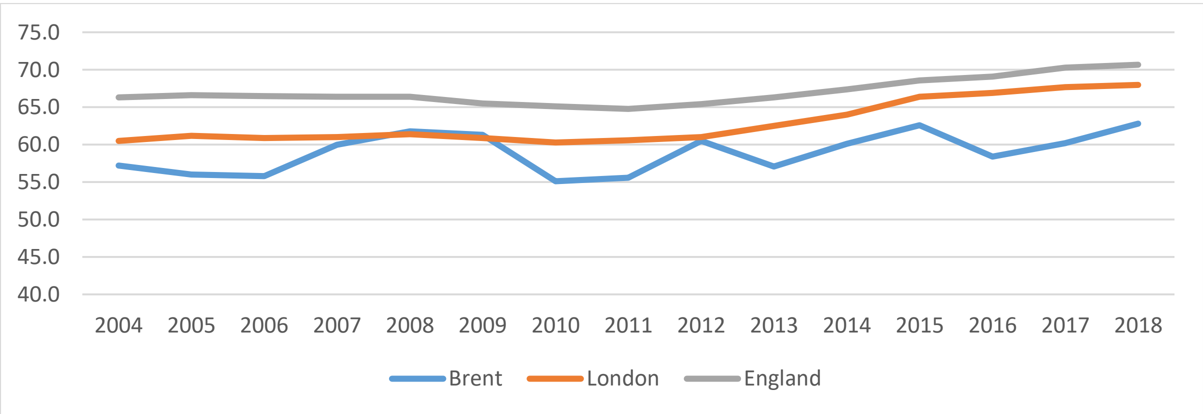
The Indian population has rates just below the white population at 71.9% compared to 71.9%[606].

Figure 291: Employment rates by ethnicity 2017

Source: Annual Population Survey

Female employment rate in Brent has been consistently lower than the UK average and was at 62.8% in 2018. This is the 6th lowest rate in London behind Kensington and Chelsea, Redbridge, Barking and Dagenham, Newham and Tower Hamlets. In 2018, economic activity for men in the borough was in line with the national average while for women it was nearly 8% behind. Therefore, the low participation rates of women are having a substantial impact on the overall levels of economic participation in the borough.

Figure 292: Female Employment Rate 2004-2018



Source: Annual Population Survey

The employment rate for people aged 50 to 64 has grown from 55% to 70% over the past 30 years, an increase of around 15%.[607] Self-employment in Brent is also higher than average at 17.4% in comparison to 13.3% in London.[608]

[606] ONS (2017) Annual Population Survey 2017
[607] ONS 2018 Labour Market by Age Group: People by economic activity and age
[608] Nomis 2018 Local Authority Profile for Brent

Community Resources

Current Resources in Brent:

- **Art galleries / Museums / Theatres**
- **Libraries** (to include community run libraries)
- **Heritage Assets** (to include listed buildings / archaeological sites / blue plaques)
- **Sports Facilities** (to include Leisure centres / playing fields)
- **Community Spaces** (to include studios / halls / hotels / music venues)
- **Public Spaces / Plazas**
- **Parks /open spaces**
- **Public Artworks / Murals**
- **Workspaces / Studios** (to include affordable/commercial workspaces with potential for creative economy)
- **Learning Centres** (Brent Start, CNWL, Universities)
- **Bars / Restaurants**
- **Community Organisations (**arts, clubs, cultural groups, dance, music, performing arts, sports
- **Markets / specialist retail**

<u>London Borough of Culture</u>

Brent is London's Borough of Culture in 2020. The council's legacy commitments include establishing an independent Cultural Trust to oversee the borough's cultural programme, and a long-term learning programme to stimulate schools to place culture in every classroom. The Trust will have a commitment to benefit Brent residents and attract visitors to the borough.

Brent is also launching Spacebook – 'an all-year round online calendar listing affordable available spaces throughout the borough that are bookable, affordable and accessible for all kinds of cultural activities'. A recent study by King's College looked at everyday creativity (the practices which take place outside publicly funded arts and creative industries) and noted a growing call for 'cultural democracy', whereby everyone has the freedom to make their own versions of culture and to make it easier for communities to access existing space. Spacebook can be seen as a response to this need.

The 2020 Borough of Culture programme includes a street party along a pedestrianised A5, an open air 'Museum of all Brent Life', reggae music festival, and a Brent anthem which will

<u>Cultural Infrastructure Plan</u>

The Mayor recognises that cultural places and spaces in London are being lost due to the new buildings and infrastructure required for a growing population.[609] To support and sustain these spaces, the GLA has produced a Cultural Infrastructure Plan, which is the first London-wide evidence base of cultural infrastructure. Identifying cultural places and spaces and flagging culture at risk. The GLA have also produced an accompanying toolbox and open source map which Londoners can add to.[610] Brent will be able to use the map to plan for its own cultural

[609] GLA (2018) Culture for all Londoners, Mayor of London's Culture Strategy
[610] GLA (2019) The Mayor's Cultural Infrastructure Plan

needs. This includes looking at how to increase Brent resident's cultural participation rates, levels have been falling across London in recent years, particularly with people from lower socio-economic backgrounds.[611]

Brent Specific Surveys

There are a number of cultural resource surveys, which contain Brent specific data. While they do hold some useful information, there is a need to collect more regular and comprehensive data on cultural participation and satisfaction levels. This is due to happen as part of Brent's London Borough of Culture programme.

The *2012 Time Out Consultation Report* sought residents' views on sports, parks and open spaces, libraries, museums and arts. While somewhat dated and with a limited number of responses (500), the survey importantly contains qualitative data not found elsewhere, such as comparative satisfaction rates and reasons for cultural participation. Its data on libraries must however be looked at in the context of the Libraries Transformation Project, which saw the closure of six of Brent's libraries in 2012.

Library specific data includes the Public Library User Survey (PLUS) and Young Public Library User Survey (YPLUS), which are carried out by the Chartered Institute of Public Finance and Accountancy (CIPFA). PLUS 2017 compares the quantitative performance of public library services across the UK from April 2015 to March 2016, while YPLUS 2017 data is taken from over 2500 forms completed in Brent libraries in February 2017. YPLUS provides a valuable qualitative and quantitative overview of library use by under 16s.

Sport England's Active People Survey measures participation in sport and active recreation, and covers the periods from October 2014 to September 2015, and finally there is a survey on Brent Museum carried out by the Council in 2016.

Time Out Survey (2012)

Respondents reported that parks and open spaces were the most important services in Brent, followed by libraries, and sports. Museums and arts were last, however, it is possible that this could be due to the lower number of museums and arts facilities within Brent.

Time Out 2012 - Importance of Brent Council services – all responses				
Service	Important/very important	Not at all important/not very important	Don't know	Response Rate
Sports provision in parks	71%	19%	10%	86%
Sports Centres	78%	16%	7%	85%
Parks and open spaces	92%	4%	5%	91%
Libraries	80%	13%	5%	89%
Museum and Archives	60%	24%	17%	83%
Arts	60%	23%	17%	84%

[611] DCMS (2016) Taking Part Survey

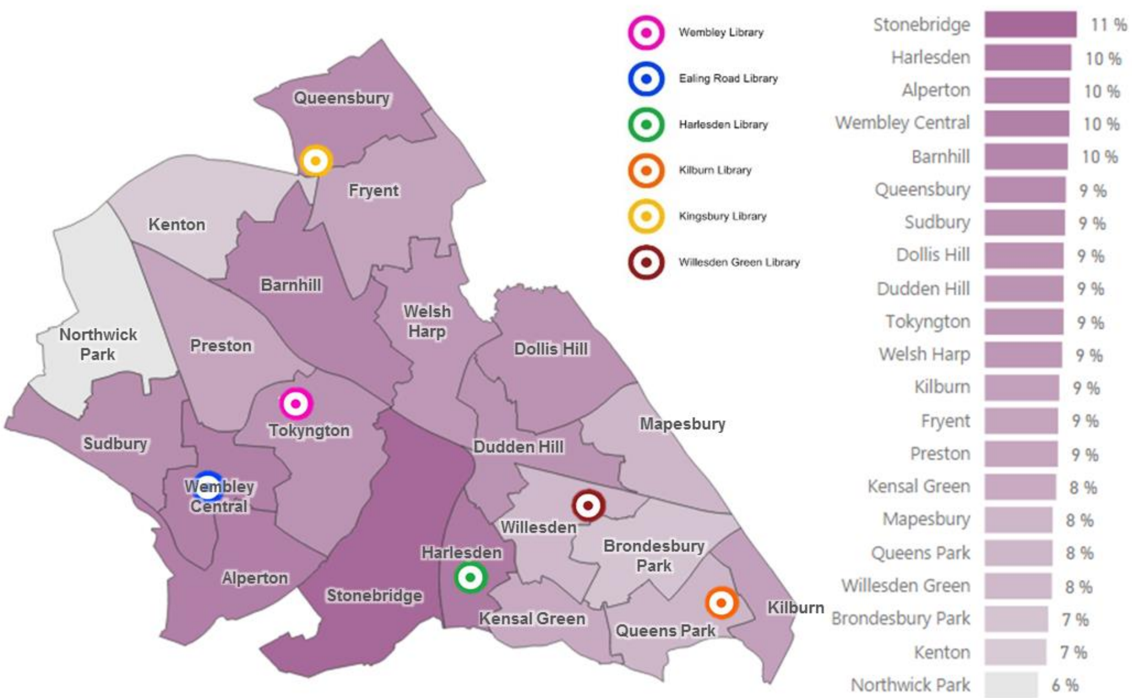
The respondents reported the highest levels of satisfaction with parks and open space, and the lowest levels of satisfaction with the libraries. However, the more recent 2017 YPLUS Survey discussed below reported that satisfaction with Brent's libraries is high amongst young users with an overall score of 8.9 out of 10.

Time Out 2012 - Satisfaction with Brent Council services – all responses				
Service	Satisfied/very satisfied	Neither satisfied or dissatisfied	Fairly/very dissatisfied	Response Rate
Sports provision in parks	46%	43%	11%	86%
Sports Centres	54%	33%	13%	84%
Parks and open spaces	77%	16%	8%	88%
Libraries	44%	33%	23%	89%
Museum and Archives	29%	61%	10%	83%
Arts	27%	61%	13%	81%

<u>Libraries</u>

Brent currently has six council-run libraries, as well as home library and community outreach services. The six council-run libraries are located in Wembley, Ealing Road, Harlesden, Kilburn, Kingsbury and Willesden Green, with all sites open seven days a week. Brent's library service also works with community libraries in the borough of which there are currently four open in Barham, Preston Kensal Rise and Cricklewood. In addition to physical library services, Brent offers a twenty-four-hour online service including e-books, e-magazines and online learning.

Figure 293: Percentage population that is under 5 years old and Library locations in Brent



Source: GLA Population Estimates (2017)

Brent has one of the lowest number of libraries compared with other Local Authorities, however the total opening hours per branch are proportionately higher.

Number of Libraries			
Brent	Outer London Average	London Average	UK Average
6	9	8	14

While the number of active borrowers at 108.14 per 1000 of the population increased compared with 2019, this has dropped from 118 in 2015 and the borrowing rate in Brent has historically been lower than other areas.

CIPFA - Number of Active Borrowers per 1,000 of the population 2014/15			
Brent	Outer London Average	London Average	UK Average
118.7	137	142	133

Within Brent, Wembley Library has the highest number of active borrowers, followed closely by Willesden Green which saw a significant increase in 2015/16.

Borrowing figures per library in Brent				
Active Borrowers	2014/15	2015/16	2016/17	2019
Home Library Service	201	212	201	175
Outreach Services	273	184	165	179
Ealing Road Library	6,488	6,102	5,654	5,195
Harlesden Library	4,158	3,974	3,912	3,420
Kilburn Library	4,893	4,571	4,265	4,025
Kingsbury Library	5,133	4,704	4,403	4,132
Wembley Library	9,459	9,232	9,005	8,820
Willesden Green Library	5,267	8,672	8,722	8,377
Total Library*	**35,881**	**37,651**	**36,327**	**34,126**
Online only	453	443	593	1,266
Grand Total	**36,334**	**38,094**	**36,920**	**35,392**

With regards to stock replenishment Brent compared well, and had an above average replenishment rate compared with the averages for nearest neighbour authorities, London, and for library authorities nationally.

CIPFA - Loan Stock Replenishment Rate			
Brent	Nearest neighbours	London	Nationally
4.4 years	8.9 years	7.6 years	8.1 years

Brent's e-library collections are a significant growth area in the service and Brent is one of the best performing services in the country for e-media loans. This is supported by participation in shared collections with other London authorities to expand and develop the offer for residents.

EBooks available for Loan			
Brent	Outer London Average	London Average	UK Average
43,132	25,213	19,319	10,330

The high volume of online visits may indicate increased digital engagement from customers in lieu of physical visits, particularly those who are not in close proximity to a library building.

CIPFA - Visits to website per 1,000 of population			
Brent	Nearest neighbours	London	Nationally
1,855	1,089	1,531	1,600

Brent has committed to increasing the number of Active Borrowers in Brent through a review of the outreach service, increased engagements with new housing developments in Wembley, and improved partnership working with education and third sector organisations.

Young People and Libraries

YPLUS 2017 reported that satisfaction with Brent's libraries remains high amongst young users, with an overall score of 8.9 out of 10. There was little difference in user's views between the libraries and there were also good scores for each aspect of library provision.

Young female use of Brent's libraries is higher than for young males. Girls (58%) were more likely than boys (42%) to use Brent's libraries; and this was a pattern repeated for each Key Stage, for each library, and for almost all Key Stages at each library.

Young Asian use has declined in relative terms since 2013 and now makes up 38% of young library users, nearer to their proportionate representation in the population. There are two demographics where relative use has improved since 2013, but where young users remain under-represented as library users: young Black users (aged 0-7 years / up to Key Stage 1) are under-represented as library users (though their use improves through Key Stage 2 to parity at Key Stages 3-4 / 16 years). Young users of the broad White group have increased their relative use of Brent's libraries since 2013 and are now similar to their representation in the population, but the pattern changes considerably with age. Young White use of libraries at Key Stage 1 has increased since 2013 and is now higher than their representation in the population. At KS2 however, Young White use of libraries is 4% lower than their representation in the population.

Sports Participation

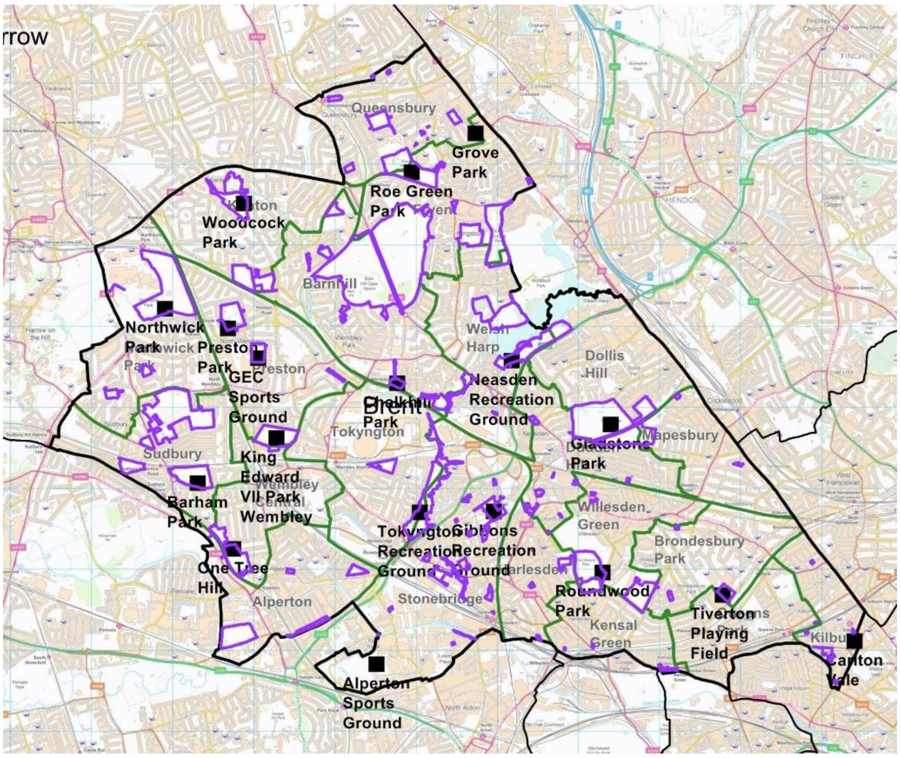
Brent has one of the lowest rates of participation in sports in London, and is below the national average (APS 2015). Over half (55.7%) of Brent adults do not take part in sport or active recreation. This proportion increased during the 2-year period to September 2015 compared with the previous 2-year period. Participation remained higher amongst the 'white' ethnic group, and lower amongst the BAME groups. There was also a low rate of participation by people within the lower socio-economic groups; the lowest percentage out of all the west London boroughs. However, the difference between participation by females and males is closer than for other west London boroughs.

The 2012 Time Out Consultation Report reported that 25% of respondents had not participated in any sport or physical activity in the last 6 months, but that 75% said that they would like to do more sport or physical activity, overwhelmingly to improve / maintain health or lose weight. The main reason given for not doing so was a lack of time, followed by cost considerations.

Time Out 2012 – Reasons for lack of sports participation – all responses	
Reasons for lack of participation	Responses (%)
Not having enough time	59%
Cost considerations	25%
Health problems	19%
Lack of motivation	10%
No convenient facilities	10%
Not sure how to start	9%
Lack of confidence	9%

While the majority of residents exercise in private gyms, the next most prevalent locations were council-owned sports centres, open spaces and schools or halls.

Figure 294: Parks, Leisure Centres and Outdoor Gyms



Source: Brent Council GIS Mapping

Time Out 2012 – Location of sports participation – all responses	
Location of Participation	Responses (%)
Private gym	29%
Council owned sports centre	19%
Park or open space	19%
School or hall	15%

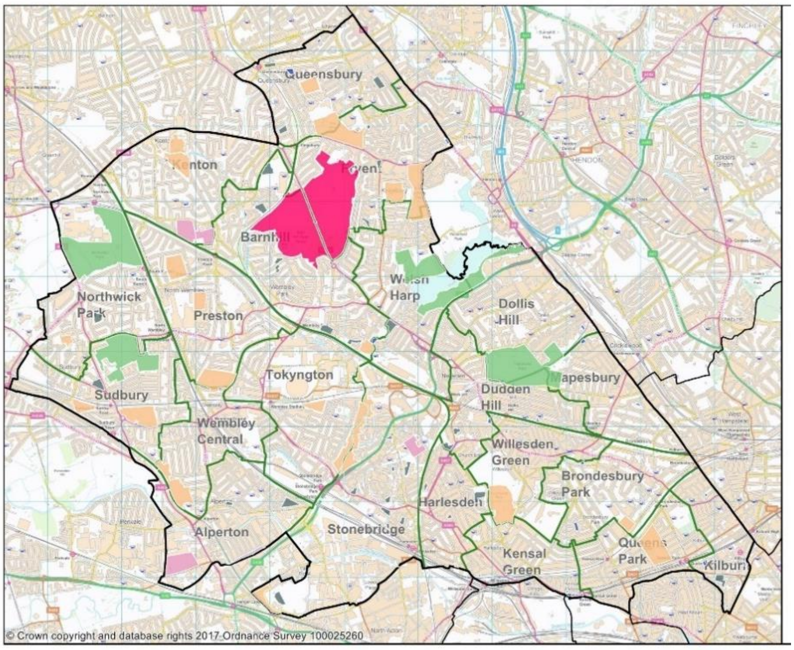
Walking was by far the most popular activity, followed by swimming, with cycling, aerobics, weight training and yoga or Pilates all receiving similar rate of response.

Time Out 2012 – Type of Activities – all responses	
Type of Activities	Responses (%)
Walking Activities	36%
Swimming	19%
Cycling	13%
Aerobics	13%
Weight Training	13%
Yoga / Pilates	12%

Parks and Open Space

Brent has 87 public parks of various sizes and typology. The land area of all the public parks within the borough equates to 699.8ha, which is approximately 2.2ha per 1000 population. The largest open space within Brent is Fryent Country Park (marked below in red on figure 295), which is 114.94ha.

Figure 295: Brent's Public Parks



Source: Brent Council GIS Mapping Service

Three out of four respondents indicated that they regularly visit parks in Brent with 62% of them visiting at least once a week[612]. There is a clear pattern of local use with 75% of people visiting on foot and reaching their most regularly visited park within 15 minutes.

The most regularly visited parks were Gladstone Park (19%), Roundwood Park (14%), Queens Park (9%) and Barham Park (7%).

612 Time Out (2012) Survey Consultation Report

The most popular suggestions for what would encourage the respondents to begin visiting parks or to visit them more regularly were the provision of cafes, toilets, a programme of events and activities, and improved children's play facilities.

Nearly half of respondents said they play sports in parks and open spaces, and over half of respondents indicated that facilities such as outdoor gym equipment, jogging routes and marked walks would encourage them to take part in more park-based physical activity.

The Mayor wants London to be the world's greenest city – with more than half of London's area green and 10% more tree canopy cover by 2050. He is also promoting more quiet and tranquil spaces.[613]

Strategies to realise these aims include:

- Making London the first National Park City.
- Increasing and improving green infrastructure in areas where Londoners, especially children, have the least amount of green space.
- Using a new Urban Greening Factor to ensure that new developments are greener.
- Protecting London's Green Belt from further development.
- Setting up a London Green Spaces Commission to find new ways for the Mayor, London boroughs, community groups and others to fund, manage and value green spaces and nature.
- Identifying the true economic value of London's green spaces through a Natural Capital Account.
- Using the planning system to protect London's biodiversity, offsetting any reductions caused by new developments with increases elsewhere.[614]

Heritage

Brent is not well-known for its built heritage and much has been lost. Yet from the iconic Wembley Stadium to Britain's first authentic Hindu temple in Neasden, as well as a wealth of historic buildings, sites and monuments, there is much to be celebrated and promoted. Brent's heritage assets have played a major role in shaping the borough's development and there is ambition to maximise the contribution that the historic environment makes to the character and identity of Brent, its economic stability and quality of life.

Brent's rich architecture from the Victorian and Edwardian periods survives in good condition, especially in the southern part of Willesden parish. During this period new railway lines brought with them housing estates and social infrastructure such as formal public parks, gardens and

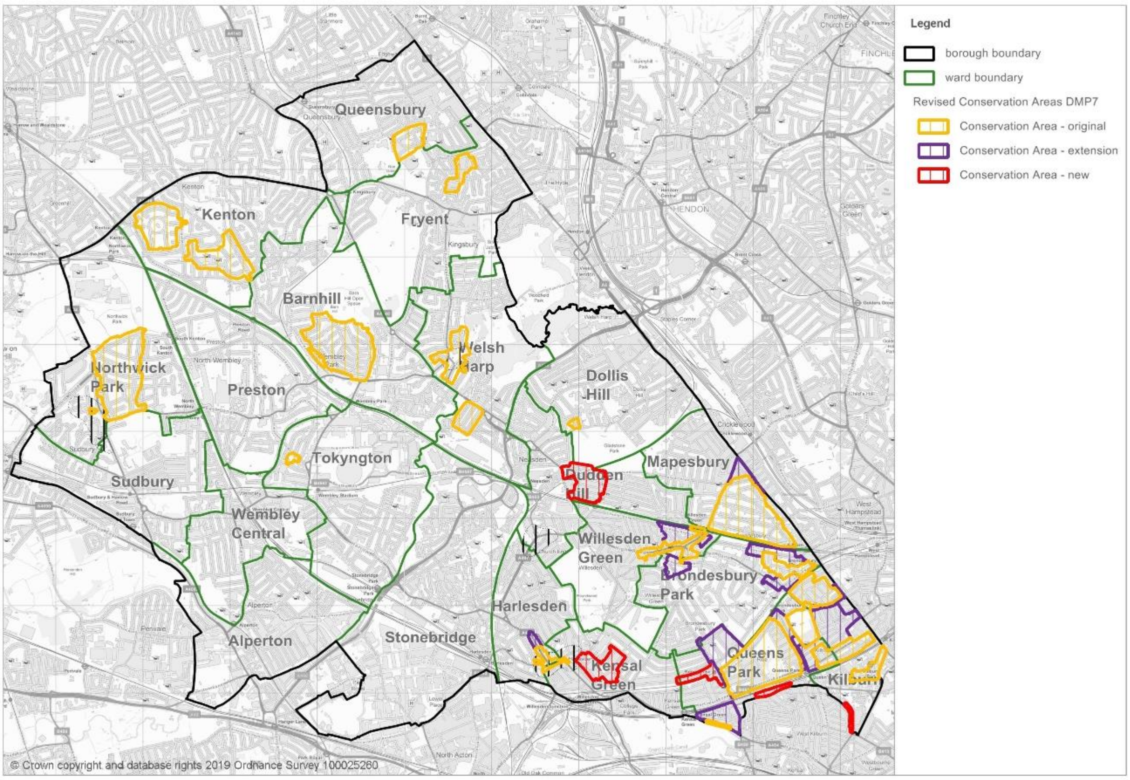
[613] GLA (2018) London Environment Strategy
[614] GLA (2018) London Environment Strategy

cemeteries. One of the best examples in Brent is the suburban planned garden village 'Metroland' development.[615]

There are around 250 statutory listed buildings that have been placed on the National Heritage List in Brent. Most are residential properties in private ownership that are well maintained. Brent only has 4 buildings on Historic England's Heritage at Risk Register.[616]

Brent has also designated around 200 Locally Listed buildings: important local landmark buildings that make a significant contribution to the character and appearance of the borough. Some, such as Willesden Library also provide cultural weight to regeneration, whilst others such as the Wrigley Chewing Gum factory and the Cabinet War Rooms are lesser-known. The List was established in 1975 with the last adopted version recorded in 2004. Locally listed buildings outside of conservation areas can be protected from demolition by Article 4 Directions, however, none have been utilised in this way at the time of writing this report. There is a need for Brent to assess such buildings as pressure from development threatens their future. The borough's Heritage Conservation Officer recommends adopting a full thematic review rather than a case-by-case approach to local listing and work with property owners. Selective redevelopment based around the historic environment is almost universally more successful than large-scale comprehensive redevelopment, better fulfilling the needs of local communities and maintaining local cultural, social and economic diversity.

Figure 296: Brent's Conservation Areas



Source: Brent Council GIS Mapping Service

There are 22 conservation areas in Brent (compared with Harrow's 29) within which there are special planning controls to be considered when undertaking development. The borough's

[615] Pevsner, N. (1991) The Buildings of England, London 3 North West
[616] Historic England website, Heritage at Risk

conservation areas cover approximately 323 hectares, or 7.47% of the borough's area. A survey of Brent's existing conservation areas was last undertaken in 2004. The conservation area boundaries of the existing areas were not reviewed nor was there a full survey of the borough to consider if other areas merit designation. People living in conservation areas generally like them and 74% of all adults in England said that they believe councils should have the powers to restrict changes in order to protect the character and appearance[617]. Brent's growing population means there is a need to consider what parts of the borough merit protection for future generations and how this can be managed. With limited resources within the council, some existing conservation areas have lost their special significance, and many of these had limited architectural and historic interest at the outset. Although some existing conservation areas will inevitably be lost, others could be extended and designated.

The draft New London Plan 2018 looks at the development around heritage assets and emphasises the contribution they make to local character. It specifies that the Greater London Historic Environment Record should be utilised alongside boroughs' character appraisals, conservation plans and local lists when plan-making and to inform development proposals. Development that affects the settings of heritage assets should respond positively to their significance, local context and character, and be sympathetic in terms of scales, materials, detailing and form. It also discusses urban renewal, the creative re-use of heritage assets, that should be done by reflecting existing or original street patterns and blocks, retaining and reusing buildings, spaces and features that are significant to the local character of an area.

Public Houses

According to the Campaign for Real Ale, London is losing 140 pubs a year. Around 900 pubs changed to other uses and more than 400 pubs were demolished between 2003 and 2012, despite London's population increasing by almost 800,000 people.[618] The draft New London Plan includes a specific policy on public houses, which states that they should be protected when they have a heritage, economic, social or cultural value, and supports proposals for new public houses. Boroughs should take a proactive approach to designating pubs as an Asset of Community Value (ACV) when nominated by a community group, which gives the community first option to acquire if a designated pub is put up for sale.[619] It has also introduced an 'Agent of Change principle'. This means that developers building new residential properties near pubs will be responsible for ensuring they are adequately soundproofed.

The Mayor will also lay down plans urging boroughs to resist applications to redevelop areas directly connected to public houses, such as beer gardens, function rooms or landlord accommodation, so that they retain their appeal to local people and visitors and remain viable businesses. Brent's pubs will become under increasing threat over a range of issues, including development, change of use, rises in rents and business rates and conflicts with residents. The council should survey its historic pubs and develop a policy for their protection.

[617] Historic England website, 50 years of conservation areas
[618] GLA (2017) Culture and the night-time economy, Supplementary Planning Guidance
[619] GLA (2018) The Draft New London Plan

Arts in Brent

Street Art

Street murals are very popular with Londoners and visitors.[620] Key murals in Brent include two commemorating the Grunwick strikes, one outside Dollis Hill Station, and one on the bridge on Dudden Hill Lane. There are many good examples of street murals in Kilburn and Harlesden. An illustration of temporary street art being used to successfully brighten up an area are on hoardings on development sites. Five murals on the hoarding at Chesterfield House were created by a local artist to celebrate nature. Other examples of street art are the Willesden Green Cat Walk Mosaics, which are based on the cat designs of former Brent resident Louis Wain (1860-1939).

The Town Centre Managers are driving forward new street art within Brent. They worked with the Brent Indian Association to submit a successful Neighbourhood CIL application for a mural on their building in Ealing Road, which completed June 2018. Town Centre Managers are also encouraging residents' associations to do the same for Coronet Parade and Rivaaz in Ealing Road and Empire House in Wembley Central. Another exciting idea is to establish a series of animal sculptures unique to Brent in a similar vein to the CowParade and Lions of Bath 2010.[621] They would make up a trail across the borough, coming together for an exhibition.

There are also opportunities within Brent to identify legal street art walls, with the Mayor of London keen to work with London boroughs to get them established.[622] London's first bookable open air public gallery has opened near Kings Cross[623], a model which could be replicated within the borough. Interested artists (anyone from local resident amateurs to professionals) are allowed to choose from available dates and wall sections to make their art. Anyone who has visited the gallery or accessed images of the artworks online will then be encouraged to comment on and rate them, informing which artworks stay on the walls longest.

Street Music

Buskers do not need a licence within Brent and are free to play wherever they want as long as they do not cause a public nuisance. More busking could bring Brent's public spaces to life and live music to its residents and visitors. Busking also gives young musicians the chance to develop and connect with audiences. The GLA has a Buskers' Code to ensure good practice.[624]

Galleries

Brent has only one dedicated gallery space at the Library at Willesden Green, which is available for public hire.

Brent Museum

Brent has one museum located in the Library at Willesden Green, which opened in 2015. The Brent Museum collection contains over 10,000 objects illustrating the history of Brent. Over

[620] GLA (2018) Culture for all Londoners, Mayor of London's Draft Culture Strategy
[621] The Guardian website, Animal art parades around the world
[622] GLA (2018) Culture for all Londoners, Mayor of London's Draft Culture Strategy
[623] Market Road Gallery website
[624] GLA (2018) Culture for all Londoners, Mayor of London's Draft Culture Strategy

400 are displayed in the permanent gallery, while many can also be viewed through an online catalogue. The Heritage Team also produce a number of free temporary exhibitions each year.

The number of visitors to the Brent Museum appears to be relatively low, however data collection has not been comprehensive. Only 51% of 241 respondents to a 2016 council survey had visited the museum in the past 12 months. This number is low, particularly since most of the survey sample respondents were on the Museum's mailing list.

Satisfaction levels with the permanent museum display were however high, albeit some dissatisfaction regarding the multimedia was noted.

Brent Council Museums Survey

Brent Council Museums Survey 2016					
	Very Good	Good	No Opinion	Poor	Very Poor
Permanent Museum Display (100% response rate – 118 respondents)	44%	44%	5%	5%	2%
Special Exhibition Space e.g. Brazil and Grunwick (97% response rate – 114 respondents)	27%	42%	27%	2%	2%
Labels and text Panels (94% response rate – 111)	26%	51%	17%	4%	2%
Collections/objects (100% response rate - 118 respondents)	25%	58%	12%	4%	1%
Multimedia e.g. touchscreens, speaking clock (95% response rate – 112 respondents)	27%	39%	23%	6%	5%
Event (74% response rate- 88 respondents)	19%	17%	61%	2%	1%
Overall visitor experience (100% response rate – 118 respondents)	33%	52%	7%	7%	1%

Theatres

Kiln Theatre

The Kiln Theatre (previously known as the Tricycle Theatre) has acted as a cultural hub for Kilburn and the rest of Brent since 1980. Located on Kilburn High Road, major refurbishments completed in September 2018 increased capacity in the auditorium from 235-seats to 292 seats and provided a new flexible stage, upgraded the historic façade of the building, introduced a new street facing café, improved wheelchair accessibility and provided additional toilets. The Kiln also boasts a 300-seat modern cinema, and rehearsal room, three multi-function rooms, which are used for extensive community and education work, and a vibrant café-bar. The theatre sees itself as a local venue with an international vision, and through the renovation will also seek to increase its catchment and become a pan-London cultural destination.

Willesden Green Library Performance Space

The Library at Willesden Green has a 100-seat performance space. The council aims to make the Willesden Green Cultural Hub one of the premier cultural centres in North West London - the performance space is not programmed as a Studio Theatre and remains a space for hire.

Troubadour Theatre

The site is occupied by the former Fountain Studios which were used for televised events between 1993 and 2017. A temporary change of use was granted to allow the auditorium to be converted into a 1000-2000 seat theatre. The Troubadour Theatre Wembley Park is set to open its doors Summer 2019. The change of use lapses 2025, after which Brent would be without a large scale theatre. A needs and impact assessment for performance facilities was not included in Brent's Draft Brent Cultural Strategy 2016-2021.

<u>Cinemas</u>

Lexi Cinema

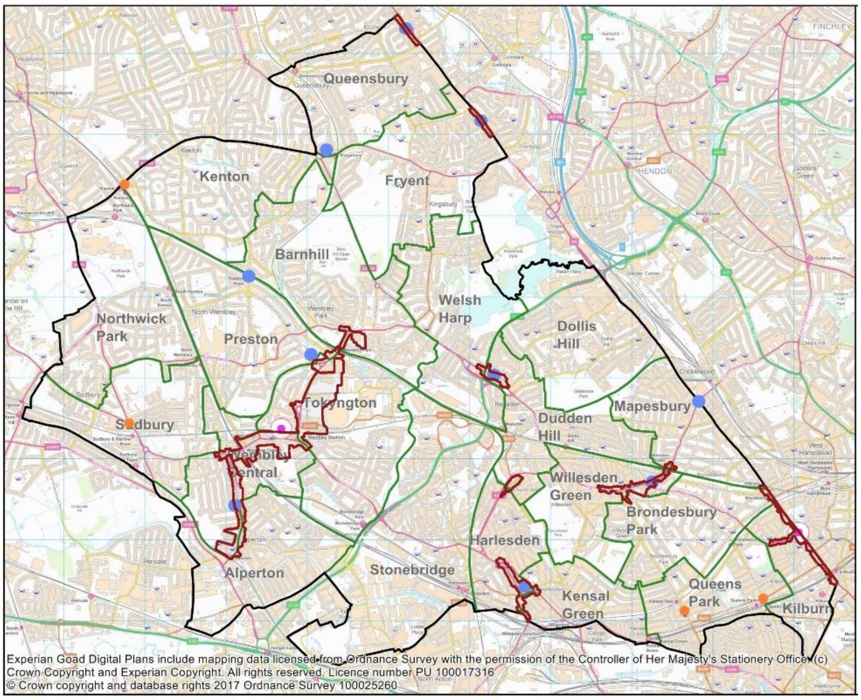
The Lexi Cinema as an independent organisation run mainly by volunteers. It shows mainstream films and live opera with all proceeds going to charity.

Cineworld Cinema – Wembley

Cineworld is a 9 screen all-digital cinema, showing the latest new film releases from Hollywood to Bollywood.

Town Centres & High Streets

Figure 297: Major Town Centres, District Centres, Local Centres in Brent



Source: Brent Council GIS Mapping Service

Town Centres within Brent		
Major Town Centres	**District Centres**	**Local Centres**
Wembley Kilburn	Burnt Oak Harlesden Cricklewood Colindale Willesden Green Ealing Road Wembley Park Kingsbury Preston Road Neasden	Kenton Queen's Park Kensal Rise Sudbury Church End

All of Brent's High Streets lie within Town Centre boundaries, Wembley High Road and Kilburn High Road lie within the two major Town Centres. As well as being local and accessible, High Streets such as those in Brent provide a range of workspaces with diverse tenure options to meet the needs of both established communities and newcomers - the high turnover of shops reflects both their precarious nature and role as a stepping-stone into a formal economy.[625] These employment opportunities are both local and accessible, fostering inclusivity, spanning education levels, country of origin, age and gender.[626]

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. The provision of opportunities for new uses will include new spaces for the creative and cultural industries and the arts.[627]

Brent has employed 4 Town Centre Managers to focus on the leadership of improved Town Centre management for 6 priority Town Centres: Wembley, Ealing Road, Harlesden, Willesden, Neasden and Church End. Their remit includes enhancing the centres' unique local characters, ensuring they are attractive and well-maintained, as well as easily accessible, both physically and online. Town Centre Managers will inform a coordinated approach for opportunities for investment. The desired outcomes for investment are:

- *Baseline data*: to benchmark and track improvements (including community and visitors' opinions)

- *Retail and consumer:* reduced vacancy rates, and particularly long term vacancy rates, and improved/ widened offer

- *Economic growth:* workspace created; employment and apprenticeships created; business rates generated.

- *Accessible and attractive:* improved public realm (clean, safe and green) and improved access via different transport/ travel modes.

[625] GLA (2017) High Streets For All
[626] Ibid.
[627] Brent Cabinet Paper (April 2017) Town Centres: Action and Investment Planning

- *Community uses:* New uses (measurable by number of users and increase in physical footprint of community uses)

- *Housing growth:* new development (number of units).

- *Vibrancy of Town Centres:* footfall and usage by different communities.[628]

The new Town Centre Managers are also well placed to co-ordinate with other tourism partners to implement a strategic vision. Possible areas to promote include, using the Stadium as a lever, niche retail offers such as Ealing Road, the night-time economy in Kilburn and the historical popularity of reggae in Harlesden.

Night-time Economy

London's night-time economy is worth £26bn and accounts for 1 in 8 jobs.[629] The night-time economy (all economic activity which takes place between 6pm and 6am) is becoming increasingly important to London and therefore Brent's economy, and the Mayor is keen to 'promote London as a 24-hour global city'.[630] The Night-time economy is mostly focused within London's Central Activities Zone (CAZ) and locally in the Town Centres. The draft New London Plan encourages boroughs to recognise and support an area's local character while investigating extending opening hours and alternative evening and night-time uses of existing daytime facilities. Boroughs should also consider appropriate measures to reduce any negative effects on the quality of life on local residents, workers and customers.[631] Large employers in the night-time economy are: transport and storage (107,136), health and social work (101,282), hotels and restaurants (97,125).[632]

Within Brent, Wembley is identified as a Nationally Important Night Time Economy Centre, while Kilburn, Cricklewood and Wembley Park are identified as Locally Important Night Time Economy Centres.[633] The night-time Jubilee line which opened in October 2017 offers a fantastic opportunity for some of Brent's town centres including Wembley and Kilburn to develop their night-time offers. The council's night-time economic strategy includes using planning policy to enable the development of unique characteristics of the different town centre, such as Kilburn's musical heritage and links to its Irish and Caribbean communities. Licensing and Regulatory Services will also support their growth in a safe and sustainable manner and economic development will help the businesses to set up and grow.

Cultural Tourism

London is the third most visited city in the world.[634] International visitors contributed £13bn across London's economy in 2017, this is equivalent to 3% of London's Economy, This outlook remains strong despite the UK's referendum result in favour of leaving the European Union. Research undertaken shortly after the vote showed that most visitors were neutral regarding its impact on their likelihood to visit London in the future. 31% said they were more likely to visit since the referendum, while just 13% said they were less likely.[635]

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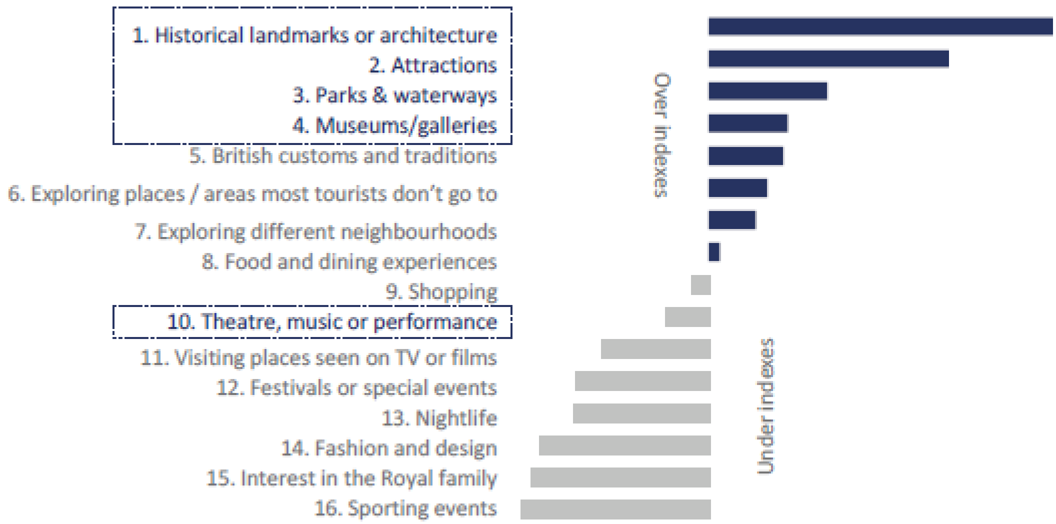
[628] Ibid.
[629] GLA (2018) Culture for all Londoners, Mayor of London's Culture Strategy
[630] GLA (2018) The Draft New London Plan
[631] Ibid.
[632] GLA (2017) Culture and the night-time economy, Supplementary Planning Guidance
[633] Brent (2018) Draft Local Plan Issues and Options
[634] Euromonitor (2016) Top 100 City Destinations Ranking 2015
[635] London & Partners (2017) London Hotel Development Monitor

In 2016 the key reasons given for visiting London were cultural. The top 4 were to visit historic landmarks or architecture, attractions, parks and waterways, and museums and galleries. Other areas which could be capitalised on within Brent are a desire to explore places / areas most tourists do not go (reason no. 6), to explore different neighbourhoods (reason no. 7), food and dining experiences (8), shopping (9), festivals or special events (12), nightlife (13) and sporting events (16).[636]

Figure 298: Drivers to Visit London



Source: London & Partners, London Visitor Survey (2016)

Key tourist attractions in Brent include:

- Wembley Stadium (will be hosting the Euro 2020 football semi-finals and finals).
- Wembley Arena

- Places of Worship
  - BAPS Shri Swaminarayan Mandir (Neasden Temple)
  - Shree Swaminarayan Mandir Kingsbury
  - Shree Sanatan Hindu Mandir (Ealing Road)
  - St Andrew's Kingsbury http://www.standrewskingsbury.org.uk/
  - Old St Andrew's

- Parks
- Roundwood Park
- Gladstone Park
- Barham Park
- Fryent Country Park
- Welsh Harp
- King Edwards Park

- Arts and Culture
- Kiln Theatre (formerly the Tricycle Theatre)
- Lexi Cinema https://thelexicinema.co.uk/
- Brent Museum, Willesden Library Centre

[636] London & Partners (2017) Tourism Report 2015-2016

- Pubs and clubs
  - Ace café https://london.acecafe.com/
  - Paradise Pub for club scene https://www.theparadise.co.uk/
  - Windermere is best statutory listed 1930s pub http://windermerepub.com/

- Buildings of interest
  - The Tin Tabernacle https://openhouselondon.open-city.org.uk/listings/3660
  - Brent Civic Centre https://www.hopkins.co.uk/projects/5/145/
  - State Cinema in Kilburn https://en.wikipedia.org/wiki/Gaumont_State_Cinema
  - Roe Green Village https://www.roegreenvillage.org.uk/
  - Mondrian House https://openhouselondon.open-city.org.uk/listings/6977
  - Cabinet War Rooms https://openhouselondon.open-city.org.uk/listings/2227
  - Metro Land. Brent contains some of best Holden Stations https://en.wikipedia.org/wiki/Metro-land
  - United Synagogue Cemetery (recently received HLF funding to open to public)

- Retail
  - Ealing Road
  - LDO including Cineworld

- Markets
  - Church End
  - Kilburn
  - Queens Park
  - Boxpark

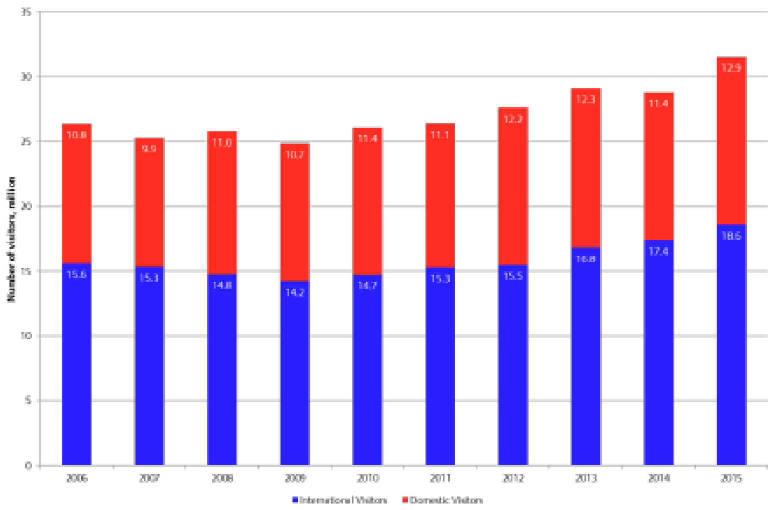
- Festivals
  - London Mela

Tourist Accommodation

In 2015 there were 31.5 million overnight visitors to London. This number has increased in most of the years since 2006 when complete data collection began, however, the nights spent per visit have declined apart from for business visitors.[637]

[637] GLA Economics (2017) Projections of demand and supply for visitor accommodation in London to 2050

Figure 299: Total Number of Visitors to London

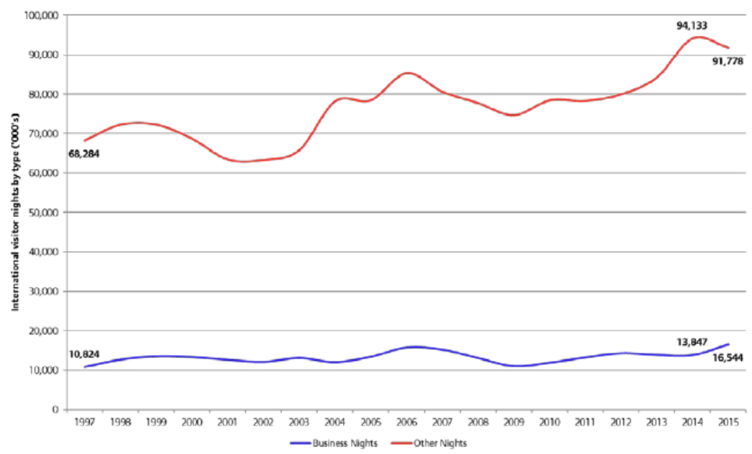


Source: International Passenger Survey, Great Britain Tourism Survey

An average of 58.2% of overnight visits to London were made by international visitors since 2006. They also tend to stay longer than domestic visitors, accounting for 78.9% of visitor nights during the same period.[638]

Business nights spend in London rose by 52.8% from 10.8 million in 1997 to 16.5 million in 2015.

Figure 300: International Visitor Nights in London by Business or 'Other'



Source: International Passenger Survey, Great Britain Tourism Survey

The current supply of accommodation is tight. London has the highest occupancy rate across the major European cites, and the fourth highest prices for hotel rooms. Airbnb and student accommodation help to relieve the demand particularly during periods when it is especially high.[639] In 2015, there were a total of 2 million overnight stays in Airbnb homes, and data from January 2016 showed that the company has seen a 182% growth in revenue, 126% growth in occupancy and a 206% increase in demand. However, five boroughs accounted for half of

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[638] Ibid.

[639] GLA Economics (2017) Projections of demand and supply for visitor accommodation in London to 2050

all overnight Airbnb bookings (Westminster, Tower Hamlets, Camden, Kensington & Chelsea and Hackney).[640]

In 2015, the supply of serviced accommodation (hotels, hostels, B&Bs and guest houses) in London was 145,737 rooms. 76.6% of the accommodation was located within central London, which is advantageous to Brent as the borough is well-connected to central London by public transport. However, there is a longer-term trend where other boroughs are increasing their shared of serviced accommodation. In Outer London, almost one third of these rooms are located in Hillingdon to service Heathrow airport. In 2015, just 2,417 rooms were located in Brent, accounting for 1.7% of the supply.[641]

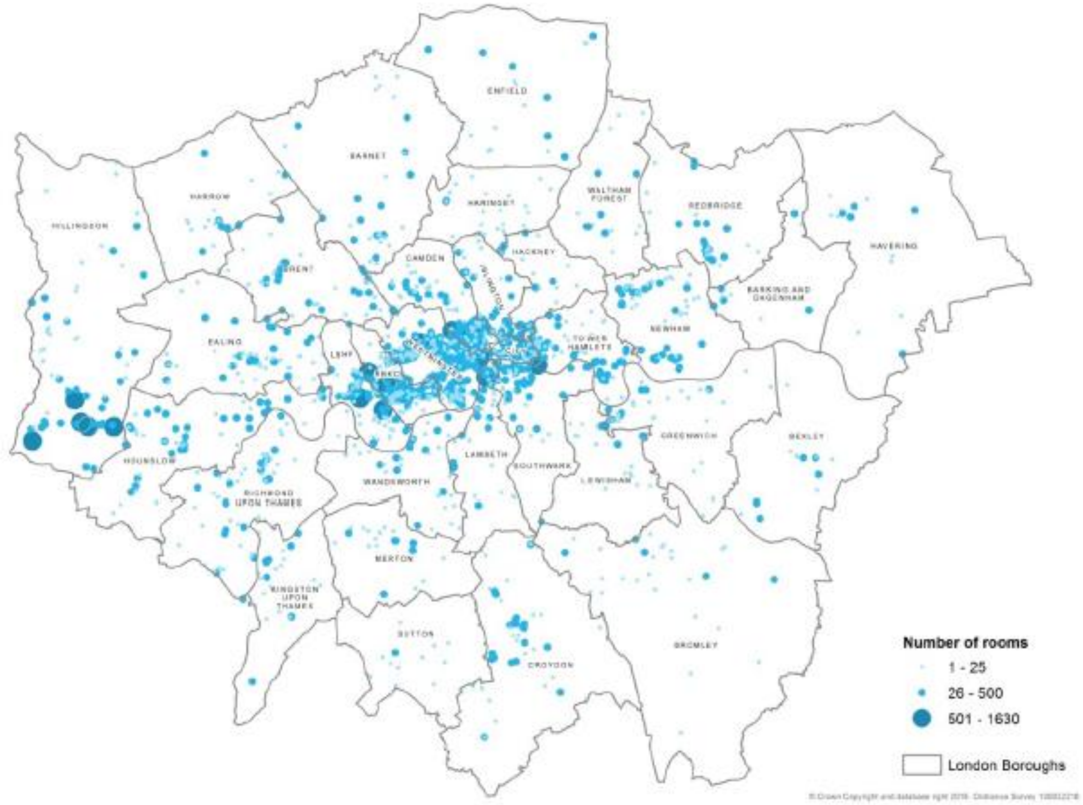
[640] Hotel Analyst (2016) Airbnb hits London
[641] GLA Economics (2017) Projections of demand and supply for visitor accommodation in London to 2050

Figure 301: Serviced accommodation room supply by London borough

Borough	Number of bedrooms	Share of London
Barking and Dagenham	587	0.4%
Barnet	1,709	1.1%
Bexley	594	0.4%
Brent	2,463	1.7%
Bromley	504	0.3%
Camden	16,642	11.2%
City of London	7,319	4.9%
Croydon	2,529	1.7%
Ealing	2,347	1.6%
Enfield	696	0.5%
Greenwich	2,036	1.4%
Hackney	2,181	1.5%
Hammersmith and Fulham	4,456	3.0%
Haringey	391	0.3%
Harrow	581	0.4%
Havering	466	0.3%
Hillingdon	10,758	7.2%
Hounslow	3,626	2.4%
Islington	4,836	3.3%
Kensington and Chelsea	14,866	10.0%
Kingston upon Thames	1,184	0.8%
Lambeth	5,282	3.5%
Lewisham	400	0.3%
Merton	638	0.4%
Newham	5,661	3.8%
Redbridge	937	0.6%
Richmond upon Thames	1,257	0.8%
Southwark	6,092	4.1%
Sutton	163	0.1%
Tower Hamlets	7,308	4.9%
Waltham Forest	595	0.4%
Wandsworth	1,451	1.0%
Westminster	38,241	25.7%
Greater London (total)	148,796	

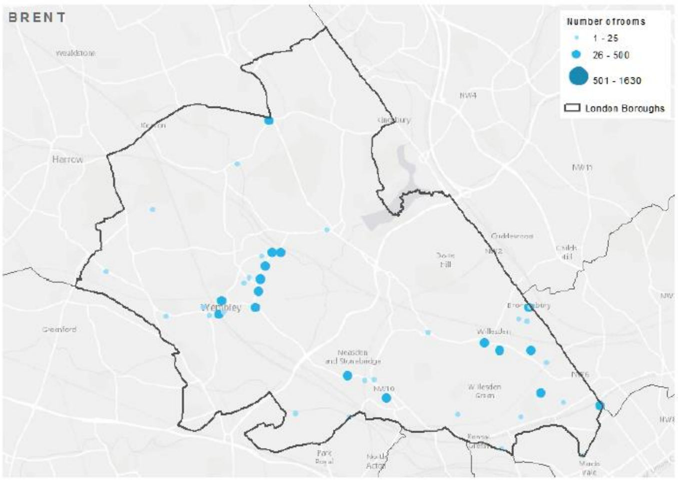
Source: London First Tourist Information

Figure 302: Distribution of room supply by London Borough



Source: AMPM Database, GLA Economics analysis (December 2015)

Figure 303: Map of Serviced Accommodation in Brent



Source: GLA Economics

Between 2011 and 2015 Brent added 782 rooms, accounting for 4.1% of the increase in London's supply.

Figure 304: Net change in accommodation room supply by London borough, 2011- 2015

Borough	Net change in supply: 2011-2015	% of London change in supply
Southwark	1,951	10.2%
City of London	1,880	9.8%
Newham	1,689	8.8%
Tower Hamlets	1,552	8.1%
Camden	1,391	7.3%
Westminster	1,386	7.2%
Greenwich	1,283	6.7%
Hounslow	1,059	5.5%
Brent	782	4.1%
Lambeth	766	4.0%
Hackney	732	3.8%
Hillingdon	560	2.9%
Wandsworth	539	2.8%
Hammersmith & Fulham	512	2.7%
Islington	463	2.4%
Croydon	385	2.0%
Redbridge	335	1.7%
Richmond-upon-Thames	330	1.7%
Ealing	328	1.7%
Enfield	288	1.5%
Kingston-upon-Thames	229	1.2%
Barnet	199	1.0%
Bexley	176	0.9%
Bromley	146	0.8%
Lewisham	141	0.7%
Waltham Forest	125	0.7%
Barking & Dagenham	80	0.4%
Merton	17	0.1%
Havering	12	0.1%
Haringey	9	0.0%
Sutton	0	0.0%
Kensington & Chelsea	-28	-0.1%
Harrow	-169	-0.9%
Greater London	**19,148**	

Source: AMPM database, GLA Economics analysis

Creative Industries, Workspaces and Education

Creative Industries

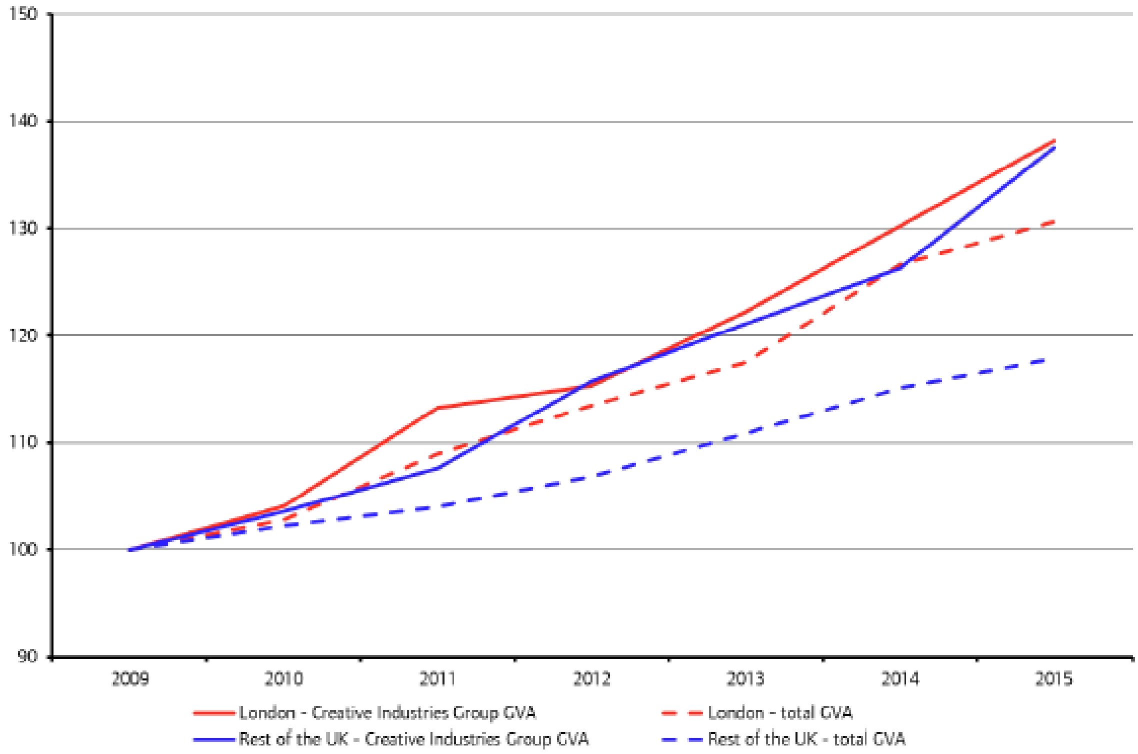
The creative industries represent a significant part of London's job economy and their GVA is growing faster than the economy as a whole.[642] In 2015, the GVA of the creative industries in London was estimated at £42 billion, accounting for 11.1 % of the total GVA in London and just under half (47.4%) of the UK total for the sector.[643] The Mayor has recognised that that the creative industries are vital to London's success. To support them he is establishing

[642] GLA Economics (2017) London's Creative Industries, 2017 Update
[643] Ibid.

Creative Enterprise Zones to enable creative businesses to 'put down roots' and Culture Seeds which will support the development of smaller community and grassroots projects.

The growing importance of the creative industries to the London and UK economy is evidenced below. Growth in creative industries GVA is just under 40% between 2009 and 2015, and outstrips growth in total economic GVA in both London and the rest of the UK.

Figure 305: Changes in total and creative industries GVA, London and Rest of UK, 2009-2015

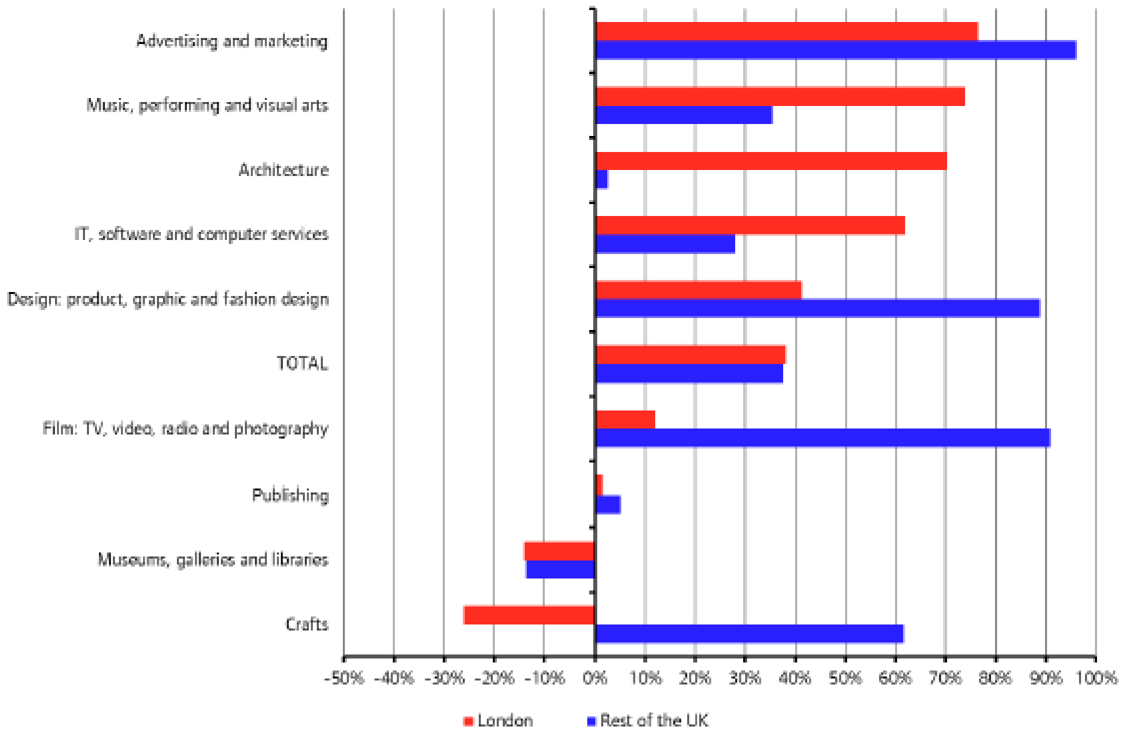


Source: GLA Economics calculations

The fastest growing sector since 2012 has been advertising and marketing (rising by 76.6%), closely followed by music, performing and visual arts (+73.8%), and architecture (+70.3%). The only sub-groups which experienced negative growth were Museums, galleries and libraries and crafts.[644] Employers in some parts of the UK's creative industries - such as animation and video games - are facing skills shortages. In addition, museums and galleries struggle to recruit talent with specialist skills in preservation and handling, and theatres lack applicants for a number of essential backstage roles.[645]

[644] GLA Economics (2017) London's creative industries, 2017 update
[645] NESTA (2018) Experimental Culture

Figure 306: Change in creative industries groups GVA, London and Rest of UK, 2009 2015

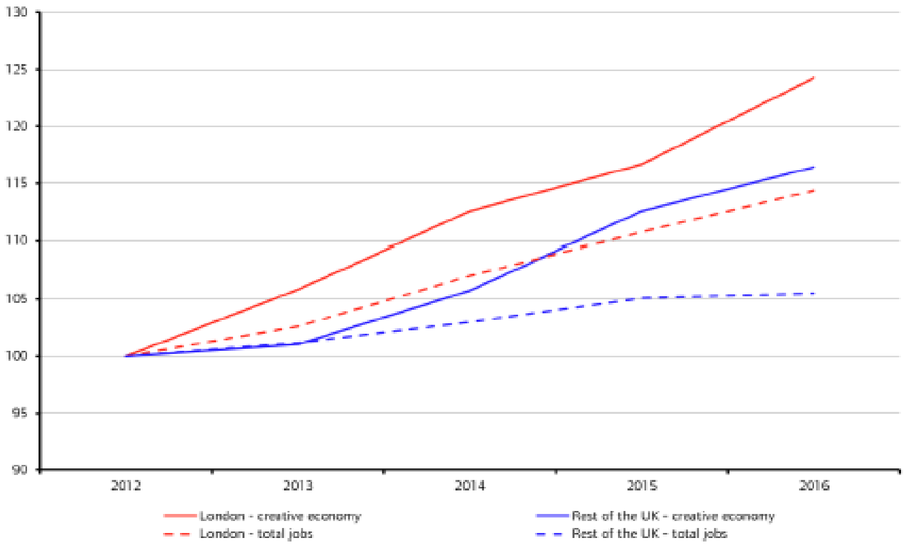


Source: GLA Economics calculations

In 2016, there were 882,900 creative economy jobs, representing 16.9% of the total jobs in the capital (compared to 7.9% in the rest of the UK).[646] Employment within London's creative economy has been growing at a fast rate. Between 2012 and 2016 the number of jobs grew by almost a quarter (24.2%) rising from 710,700 in 2012 to 882,900 in 2016. This was above the rate of jobs growth in London as a whole (14.4%) and for the creative economy in the rest of the UK (16.5%).[647]

[646] GLA Economics (2017) London's creative industries, 2017 update
[647] Ibid.

Figure 307: Change in creative economy employment and total employment, London and Rest of UK



Source: GLA Economics calculations based on ONS Annual Population Survey (APS) (2012-2016)

The creative economy has seen relatively strong growth for both genders and people from BAME backgrounds. However, in 2016 women made up 35% of the creative workforce compared to 44% in the wider economy and 23.4% of creative jobs are held by people from BAME groups compared to 33% in the wider economy.[648] 95% of creative jobs are held by people from advantaged socio-economic groups, compared to 73.8% overall.[649] The Mayor of London plans to bring together 'industry leaders, diversity campaigners and strategic partners to develop a set of recommendations aimed at unlocking greater diversity. He is also creating a Good Work Standard which could help creative businesses to be more inclusive including their recruitment processes and limiting unlawful unpaid internships.[650]

One third of creative jobs are filled by non-British nationals[651] . In 2016, an estimated 27.8% of jobs in the creative economy were taken by self-employed workers, compared to 16.8% in the non-creative economy[652].

Figure 308: Jobs in the creative economy, self-employed and employee jobs

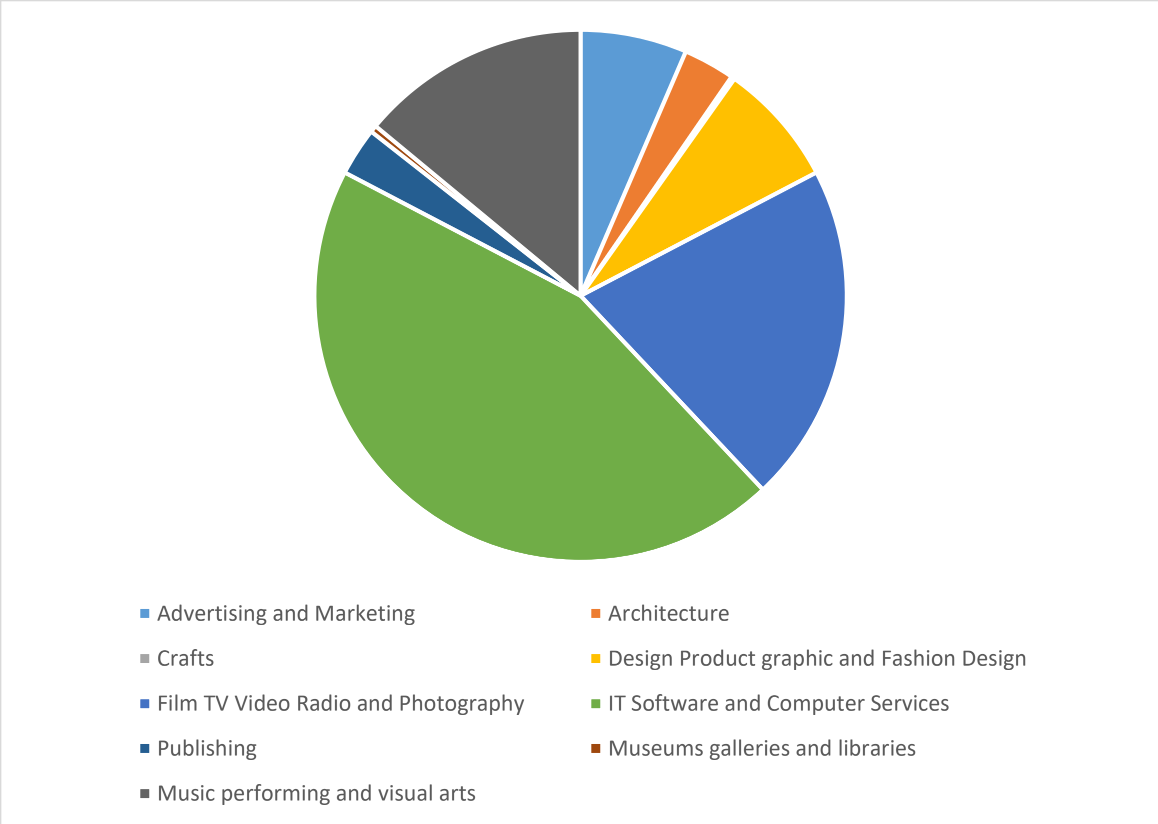
Source: GLA Economics calculations based on ONS Annual Population Survey (APS) (2012-2016)

[648] GLA Economics (2017) London's creative industries – 2017 update
[649] Ibid.
[650] GLA (2018) Culture for all Londoners, Mayor of London's Draft Culture
[651] ONS (2017) Breakdown of Creative Economy in London 2012 to 2016
[652] GLA Economics (2017) London's creative industries – 2017 update

In 2018, 6% of jobs in Brent were in 'Arts and Entertainment' just behind the London level of 7%. Mapping types of employment in Brent shows a high proportion business and professional service employment located along the south-eastern fringe of the borough (43%) relative to other areas, which includes the sub-sector of ICT, Media and Creative Activities (16%).[653]

Total turnover of the creative economy in Brent is £706,777. The largest sector in the Borough is IT and Software services, which includes publishing of computer games and computer programming activities.[654]

Figure 309: Creative industries in Brent 2017



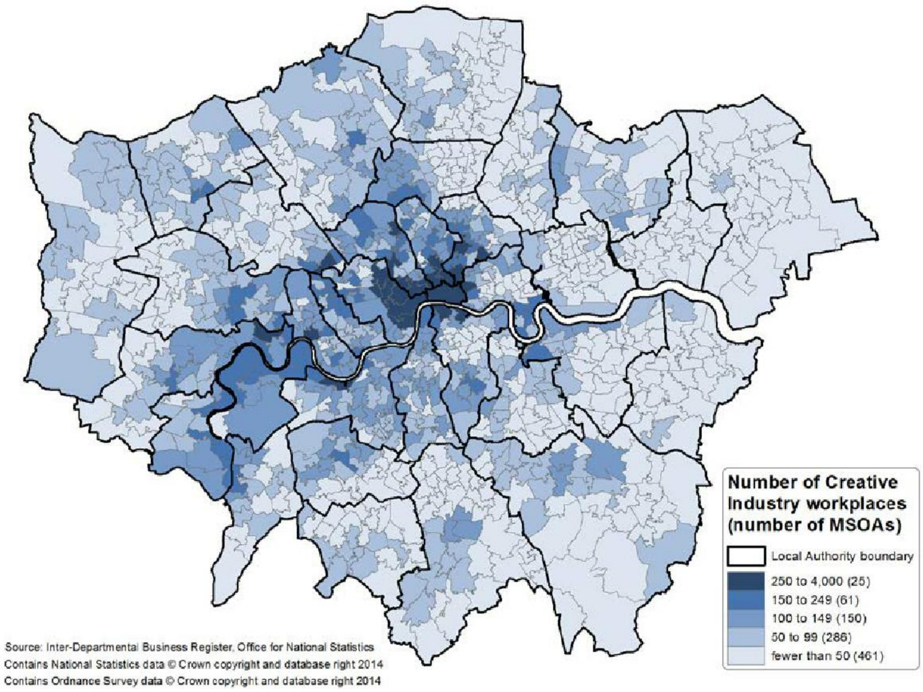
Source: ONS UK Business

<u>Creative Workspaces</u>

In the last 10 years London has lost a third of its creative workspaces due to rising rents, business rates and conversion of workspace into housing.[655] Many creative businesses are in industrial spaces, and London lost 260 acres of industrial land per year over 2010 to 2015.[656]

[653] Regeneris Consulting, We Made That and PRD (2017) Brent Workspace Study
[654] ONS (2017) The creative industries in the London Boroughs
[655] GLA (2018) Culture for all Londoners, Mayor of London's Draft Culture Strategy
[656] Colliers International (2017) London Industrial Supply Snapshot 2017

Figure 310: Number of workplaces in the Creative industries in London



Source: MSOAs Source Inter-Departmental Business Register ONS (2014)

To support the creative industries, the Mayor is working with boroughs and stakeholders to set up Creative Enterprise Zones (CEZ). The aim is to support the provision of small industrial and creative workspaces, which are suitable and affordable for artists and creative businesses[657]. While Brent was not amongst the first six CEZs designated by the Mayor in December 2018, it is still able to use it planning policies to protect existing workspace, encourage new workspaces for the creative industries, ensure that low-cost business space and affordable workspace is made available, and encourage the temporary use of vacant buildings for creative uses.[658]

Creative Education

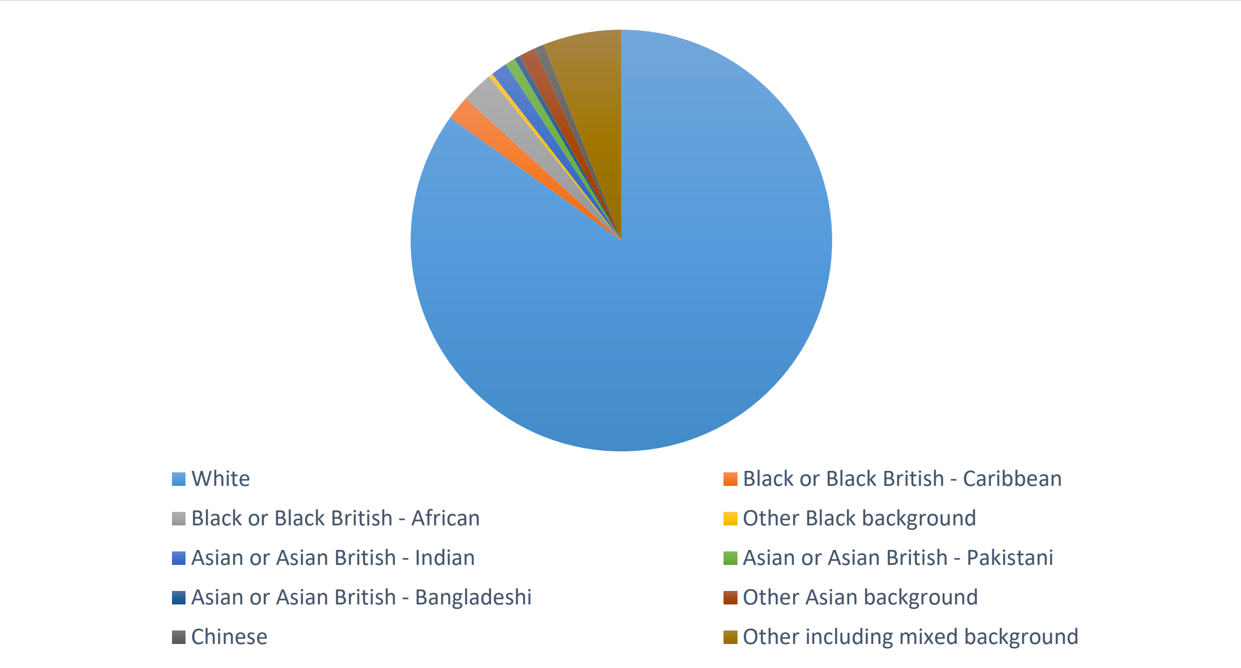
Since 2010 there has been an almost 30% drop in the number of people taking arts subjects at GCSE.[659] Evidence from teachers and school leaders indicates that various factors are placing pressure on arts subjects, including a lack of funds and the introduction of the English Baccalaureate, and Progress 8 (a new measure of school performance) which has led to the prioritisation of STEM subjects at the expense of others.[660] Negative perceptions around the value of Art and Design to careers and quality of life also persists amongst parents, pupils and school management.[661] The Mayor of London wants schools to adopt the London curriculum to ignite young people's creativity. As part of the London Borough of Culture, Brent will host the Mayor's new creative leadership programme for young people from diverse backgrounds,

[657] GLA (2018) The Draft New London Plan
[658] Ibid.
[659] GLA (2018) Culture for all Londoners, Mayor of London's Culture Strategy
[660] HEPI (2017) A crisis in the creative arts in the UK?
[661] Ibid.

which is designed to give them the chance to develop creative careers and businesses. The GLA's Digital Talent Scheme is investing £7 million to help 18-24 year old, particularly women and Londoners from diverse ethnic and disadvantaged backgrounds, to obtain the skills required for digital, creative and technology occupations.[662] A Skills for Londoners Taskforce launched by the Mayor of London has highlighted the creative industries as a key sector for skills development.[663]

In the UK, women constitute 65% of university undergraduates studying creative arts and design[664]. The chart below shows university undergraduate make-up by ethnicity, highlighting the very small amount of ethnic minorities studying creative arts and design at degree level.

Figure 311: Undergraduate Creative Arts and Design students by ethnicity



Source: HESA 2017

A similar pattern is observed in schools and a number of studies suggest BAME students face a series of challenges breaking into careers in the arts. Parental perceptions play a role in encouraging or discouraging consideration of careers in the arts.

There is however variation between different groups. In 2016, 59.8% of Black Caribbean pupils entered at least one arts subject, compared with 41.9% of Indian pupils and 39.5% of Pakistani pupils[665]. A small number of respondents to the online survey who worked in schools with high proportions of pupils from Asian backgrounds explained that uptake at their schools was hindered by the belief amongst parents and pupils that arts subjects were unlikely to help future career prospects[666]. This is likely to have a big impact in Brent because of the large Asian and Black communities.

[662] GLA (2018) Culture for all Londoners, Mayor of London's Culture Strategy
[663] Ibid.
[664] HESA (2017) HE student enrolments by subject area and sex
[665] EPI (2017) Entries to arts subjects at Key Stage 4
[666] HEPI (2017) A crisis in the creative arts in the UK?

Adult Learning Centres

Brent has three adult learning centres: Stonebridge Centre, Harlesden Library Plus, and Willesden Green Library, which offer a variety of creative courses including hair dressing, sewing, sugarcraft, art, stained and kiln-formed glass and pottery.

In 2016/17, 475 students enrolled on a crafts, creative arts or design course, and the pass rate was 94.5% compared to the national average of 86.8%. The majority of students were female (401 women to 74 men) and typically aged between 30 and 59 years old. Success stories from this cohort include a kiln-formed glass student who won a South Kilburn Trust Enterprise Award to set up her own jewellery business, and another glass learner who set up her own exhibition.

Age Range of students enrolled on crafts, creative arts or design courses at Adult Learning Centres	
Age Range	**%**
19-29	10%
30-39	23%
40-49	22%
50-59	27%
60-69	14%
70+	4%
	475 enrols

Further Education College

The College of North West London has campuses in Willesden and Wembley Park. It offers vocational courses in beauty, hairdressing, media, radio and robotics.

Universities

The University of Westminster School of Media, Arts and Design is located in Northwick Park. Courses are available in the following subjects: art and design, fashion, television, film and moving image, journalism and digital media, music, photography. University College of Football Business in Wembley offers a range of courses in sport and business management.

Brent currently lack the presence of a Higher Education Institute (HEI) in the borough, however Quintain's masterplan for Wembley Park does includes flexible options for education institutions to create up to 270,000 square foot of new purpose built space.

<u>Creative Apprenticeships</u>

The Mayor of London plans to encourage the creative industries to offer more new apprenticeships, including courses in fashion and film.[667] Creative industry apprenticeships fall

[667] GLA (2018) Culture for all Londoners, Mayor of London's Draft Culture Strategy

under the groups: content creation, production and post-production; visual effects, animation and games; broadcast engineering; craft and technical. Creative, cultural and design apprenticeships cover areas such as theatre lighting, sound and stage or fashion.

Culture, Physical & Mental Well-being

An All-Party Parliamentary Group on Arts, Health and Wellbeing produced a 2017 report on the contribution the arts can make to our health and well-being. It talks about a growing movement towards a person-centred health system and shows how the arts can be used to enable people to "take greater responsibility for their own health and wellbeing engagement with the arts can improve the humanity, value for money and overall effectiveness of the health and social care systems.[668] 82% of people in deprived communities in London, enjoyed greater wellbeing after engaging with the arts and the Mayor of London's Draft Health Inequalities Strategy has recognised the positive role arts and creativity can have in improving mental and physical health. Under the cultural strategy he will map arts and cultural activity aimed at improving mental health and wellbeing to identify opportunities.[669]

Social Prescribing

There is a growth in "social prescribing" whereby people are referred to activities in the community instead of medication.[670] Within Greater Manchester's population health plan local elected leaders and clinicians have made arts activity a central element of future planning and provision and an arts-on-prescription scheme in Gloucestershire and Wiltshire referred patients with a wide range of conditions to take part in an eight-week course of two-hour arts sessions. [671] A cost benefit analysis found that there was a net saving to the NHS of £216 per patient.[672]

NHS England's Five Year Forward View (2014) has responded to the challenges caused by an ageing population and increase in the number of people with long-term conditions by calling for a 'new emphasis on prevention and the development of community based, non-medical responses' to a range of physical and mental health wellbeing needs.[673] At least one third of GP appointments are, in part, due to isolation and an estimated 1.2 million older people are chronically lonely highlighting the scale of this issue and the impact it has on the healthcare sector. [674] [675] Arts and crafts activities have been shown to reduce loneliness and are an area which the borough could look at including within its health provision. This is an interesting avenue to explore considering Brent's older population is expected to grow by 68%.

Digital Culture

Digital culture includes digital technology such as digitised collections, livestreaming, maintaining an online presence (including Facebook, twitter, Instagram), email marketing, search engine optimisation, paid search and / or online display advertising, selling tickets online.

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[668] APPG (2017) Creative Health, the Arts for Health and Wellbeing
[669] GLA (2018) Culture for all Londoners, Mayor of London's Draft Culture Strategy
[670] APPG (2017) Creative Health, the Arts for Health and Wellbeing
[671] Ibid.
[672] Ibid.
[673] Ibid.
[674] Ibid.
[675] APPG (2017) Local Government Support for Health and Wellbeing through the Arts and Culture

A nationwide study on the use of digital technology in publically funded arts and cultural organisations found that it is having a major positive impact on their business models and revenue, and helping to reach larger, younger and more diverse audiences. Increasing their dialogue with existing and new communities and helping organisations to understand these audiences. The highest impact overall was recorded for Visual Arts and Literature organisations and the lowest for Theatre and Heritage organisations. The four areas of activity which increased in the period 2013-2017 were ticketing, donations, social media and live streaming platforms. For example, in 2017 92% of organisations used Facebook, 48% were on Instagram and 85% on Twitter. The most common activities on social media were around audience development, encouraging users to share content (51%) and publishing videos (47%). One third of organisations also regularly used social platforms to network with other industry professionals. The use of Vimeo, Pinterest and Flickr had all dropped significantly. Over 60% of UK online time is now spent on mobile and the proportion of arts and cultural organisations with a mobile presence has more than doubled from 33% in 2013 to 69% in 2017.

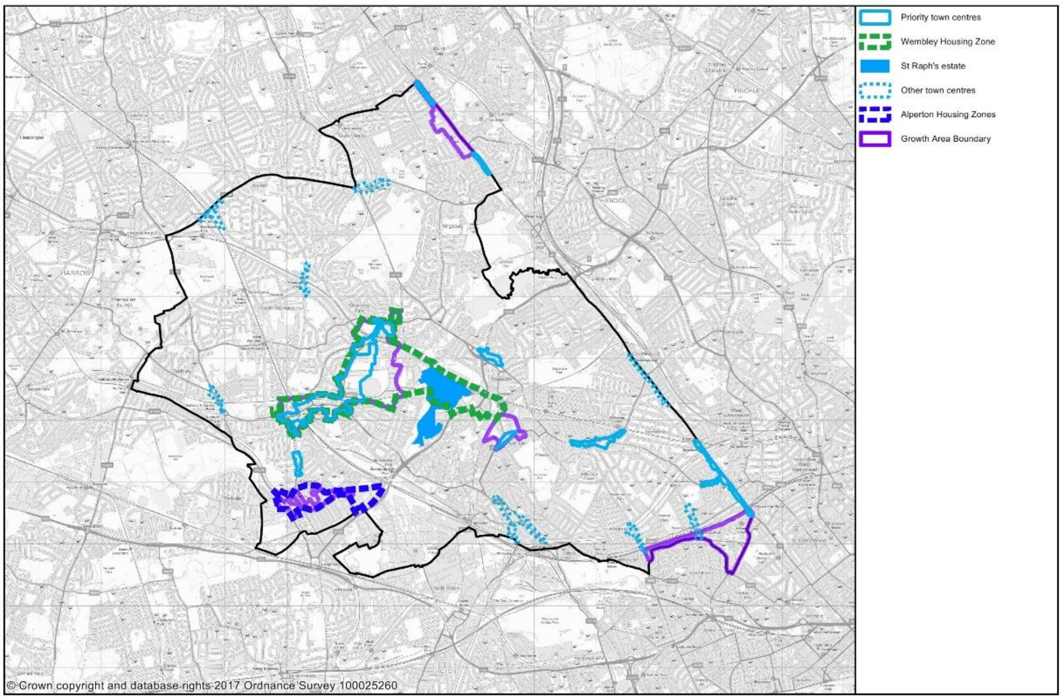
However, fewer organisations in 2017 were experimenting with digital technology than in 2013. The most reported barriers were lack of funds and staff time. It is telling that the four areas above consist of technology which has become easier to use or implement through innovations outside of the sectors suggesting that the arts and cultural sectors are not becoming abler overall to utilise digital technology. It is also worth noting that large organisations placed more importance on digital technology to their business models than small heritage organisations which are more typical of Brent[676].

Going forward some organisations noted that younger audiences were harder to reach due to the popularity of private messaging apps such as WhatsApp and those with disappearing content including Snapchat, as traditional social media channels such as Facebook and twitter had been adopted by Generation X. Organisations also still appear to be considering whether more complex activities such as live streaming are worth the investment.

[676] NESTA (2017) Digital Culture

Pipeline Cultural Regeneration Projects

Figure 312: Regeneration Areas and Town Centres in Brent



Source: Brent Council GIS Mapping Service

<u>Major Projects</u>

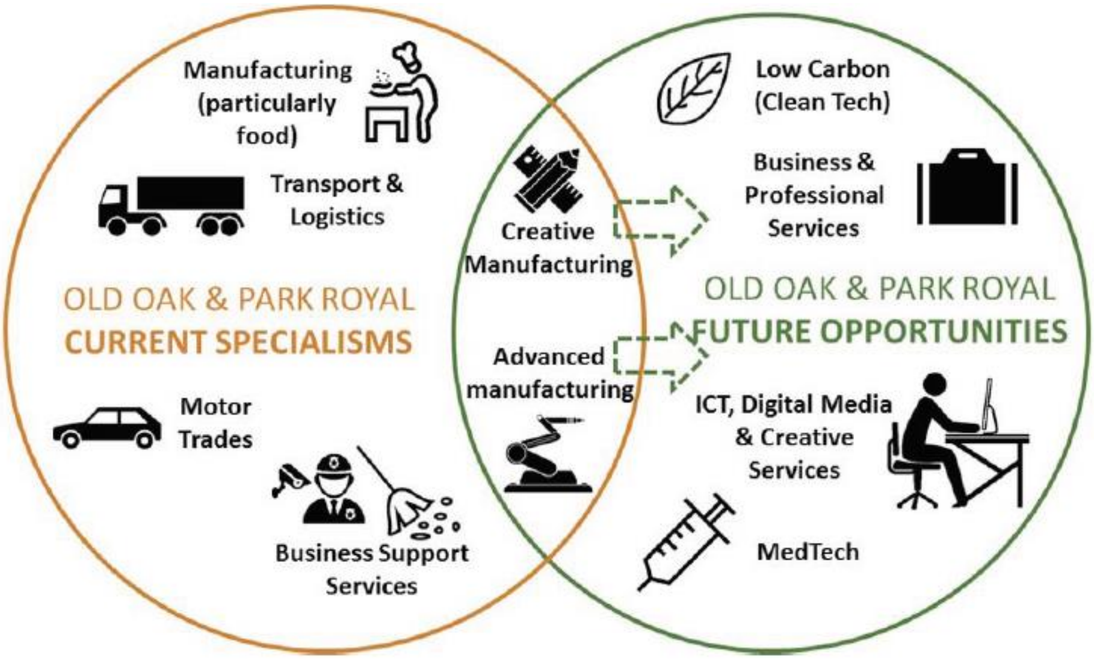
- OPDC

Old Oak and Park Royal (OPDC) is London's largest transport and regeneration project and it will include a new commercial centre and cultural quarter around the planned Old Oak Common station.[677] A significant number of new employment opportunities will be created by the redevelopment. An Old Oak Cultural Strategy will be produced that is going to embed culture into the development. The area has received funding from Arts Council England and Heritage Lottery Fund to embed arts, culture and heritage in local plans and decision making.

The draft OPDC Local Plan specifies that some sectors will need support to establish themselves, including access to micro and small, flexible/open or low cost workspaces.[678] There are already a number of workshops and artist studios within the area and OPDC have committed to 'protecting and /or re-incorporating studios within the new developments', and to support the provision or new artist studio space and secure a proportion of low-cost and/or open workspace provision from major development proposals.[679]

[677] GLA (2018) Culture for all Londoners, Mayor of London's Draft Culture Strategy
[678] OPDC (2017) OPDC revised draft Local Plan 2017
[679] Ibid.

Figure 313: OPDC Future Employment Growth Sectors



Source: OPDC Future Employment Growth Sectors Study (2017)

- Wembley Park

Quintain continue to rollout their development at Wembley Park, with their acquisition by Lone Star in 2015 and subsequent move to build to rent housing accelerating the regeneration. Around 1 million square foot of office space is secured under major planning permissions in for Wembley Park, with the first office block due to complete summer 2020. The second phase of Quintain's low cost employment space is due to be developed around 2020, with at least 1,100sqm due to be delivered and the operators and details of the space to be confirmed.

- Northfields

St George has secured planning permission to redevelop the former Northfield industrial estate in Alperton. As well as around 2,900 new homes, a community centre and public open space, a new 'Generator' facility is planned which will contain c.180,000 sq. ft. for light and heavy industrial use, as well as some affordable workspace uses.

Sports Centres

- *Bridge Park Leisure Centre* - Brent Council is working with the owners of the Unisys site situated adjacent to the Bridge Park Community Leisure Centre in Stonebridge to regenerate the site for new homes, businesses and a brand new leisure centre with improved facilities including: four court sports hall, 65 station gym, smaller separate gym, children's soft play area and party room, sauna and steam rooms, studios, spin studio, small meeting room, 50 car parking spaces, four lane swimming pool with moveable floor. Work isn't expected to begin on site until 2019 at the earliest.

Libraries

- *Preston Park Annexe* – Approval granted for 19 new homes and a ground floor community use space which is expected to include a library.

- *Ealing Road Library* – Approval granted for improvements to the library, which will increase its size to include a café and space for a community and enterprise hub, as well as a new forecourt area with performance space.

Community Centres

- *Learie Constantine Youth and Community Centre* – Approval granted for a mixed use scheme comprising a new ground floor community centre and residential accommodation above.

- *Carlton and Granville Centres* – Phase 1 has created a new Enterprise Hub and Community Space in the Granville Centre in South Kilburn, which opened May 2018 and it is expected to run for 5 years. The flagship project is home to local microbusinesses and SMEs from mix of sectors including the creative industries, as well as some education and professional service companies.

- *Wembley Park Community Centre (Elvin Gardens Development)* – To open in July 2018, will incorporate the Yellow Pavilion currently located on Engineers Way.

Markets

- *Church End Market* – Approval granted for around 800 homes by 2026 and a new market square to replace Eric Road Market which is expected to be start on site 2019/20.

- *Boxpark Wembley* – Opened as Boxpark's biggest location December 2018 on the corner of Fulton Road and Olympic Way. Home to 27 independent food and drink retailers, and 20,000sqft / 2000 capacity arena space featuring events reflecting the community and culture of the surrounding area. Boxpark is due to stay in Wembley Park for at least 10 years.

Theatre

- *Kiln Theatre (formerly Tricycle Theatre)* – The theatre completed a major refurbishment project in 2018, assisted with £1 million of funding from Brent Council. As well as boosting the theatre's capacity by about 25%, wheelchair access has been improved and the front façade is opened up along Kilburn High Road, one of the council's priority High Streets.

Workspace

- *243 Ealing Road* – Artists Studio Company acquired a 125-year lease of the new build property from Network Homes in 2018. The major mixed scheme is located alongside the Grand Union Canal in Alperton, with the affordable workspace element opening in February 2019 to accommodate artists and creative businesses. Priority is given to Brent residents and affordable workspace tenants at 243 Ealing Road also receive free support through mentoring, training, development and business growth loans. There is a resource library, meeting room, artist's lounge, printing facilities and high speed broadband. There are 27 artist studios, plus 6 micro studios which offer shared bench space for creatives on more flexible terms. 1 artist studio is made available free for a Brent resident, with the lucky winner selected under a rolling 2-year competition.

- *Wembley Park* – In March 2018 the 26 studios managed by Second Floor Studios & Arts in Quintain's Wembley Park development had reached 100% occupancy. They consist of long-term affordable employment space for artists, makers and designers in the units along Empire Way and in the new Alto development. There is a second phase of low cost employment space due to be developed in Quintain's Wembley Park development around 2020, with at least 1,100sqm due to be delivered and the operators and details of the space to be confirmed.

- Together the affordable workspace schemes at 243 Ealing Road and Wembley Park won the Place West London Placemaking Awards 2018.

- *60 Neasden Lane* – Planning permission has been granted for 898sqm of managed affordable workspace as well as 121 housing units.

- *Alperton House* – Planning permission has been granted for 1,452sqm of managed affordable workspace, alongside 469sqm light industrial floorspace, within major mixed use waterside regeneration that also provides 474 flats, a new Public House and improved public access to the Grand Union Canal.

- *Watkin Road* – Planning permission has been granted for 787sqm of managed affordable workspace in a mixed use redevelopment of an underutilised commercial site in Wembley.

<u>Night-time Economy</u>

- *Wembley* – Actions are being targeted to improve the restaurant offer attracting people visiting the stadium, including the vegetarian restaurants in Ealing Road. The introduction of other evening activities including a cinema/cultural hub on Wembley High Road, a bowling alley, live music venues and dancing lessons is being encouraged.

- *Kilburn* – The council is using planning policy to encourage unused spaces to become restaurants, bars, music venues, cinemas etc. The creation of a night market is also planned.

Key Trends

Key Trend 1: Ageing Population

Brent's older population is forecast to increase by 67% between 2019 and 2040 due to increased longevity and reduced fertility rates[680]. This increase presents both opportunities and challenges for the cultural sector. The growth in the 65-74 age group could increase volunteering and attendance at museums and galleries as this group has comparatively high participation rates for both.[681] The increase in this demographic could also be expected to lead to more visits to the High Streets reflecting their importance as gathering places for marginalised and under-represented groups, such as the elderly.[682] On the other hand, ill health linked to ageing poses a key challenge to cultural participation, particularly among those aged 85 or over, and in the UK the numbers of those aged 85 or above are projected to grow faster than any other age group. In 2016, there were 1.6 million people aged over 85 and this is predicted to double to 3.2 million by 2041.[683] This cohort has the lowest rates of volunteering, museum and gallery visits and digital engagement with cultural sectors.[684]

The increasing numbers in the 65-74 age group present an opportunity for the cultural voluntary sector. In 2014, 7.9% of all adults volunteered in either arts, museums or galleries, heritage, libraries, archives, sport and those aged 16-24 and 65-74 have comparably high rates for volunteering in general[685][686]. As the number of 16-24 year olds is forecast to fall, the 65-74s will become even more significant to the voluntary sector. However, this must be considered alongside the trends towards later retirement and increasing caring responsibilities. In 2011, 1.2 million over 65s were caring for someone and this is projected to rise to 1.8 million by 2030. Both trends and the fact that participation numbers are lower amongst BAME people and lower social-economic groups that are more prevalent in Brent, will require cultural organisations to employ creativity and flexibility when engaging with this age group.

In Brent, healthy life expectancy (number of years an individual can expect to live in good health) for males in 2014 - 16 was 64.9 years. This was similar to the average in England which was 63.5 years. Healthy life expectancy for females in 2014-16 was 66.6 years (England: 63.9 years).[687] Increasing ill health linked to old age will make it more difficult for people to participate in cultural activities. Older ages are correlated with chronic diseases such as diabetes, arthritis, congestive heart failure and dementia and with disability these conditions will therefore increase as the older population does.[688] It is estimated that by 2021 there will be 940,000 people with dementia, rising to 1.7 million people by 2051 and the current number of people over 70 years of age with a dual-sensory impairment will rise from 222,000 to 418,000 by 2030.

At the same time as ill health rates are rising there is a growing evidence base for the positive impacts that cultural participation has on health and well-being. This has led to a trend for organisations to work in partnership with health and social services to offer activities on

[680] GLA Population Projections - Custom Age Tables: Long trend 2017
[681] OIPA (2016) The UK's Ageing Population: Challenges and opportunities for museums and galleries
[682] GLA (2017) High Streets For All
[683] ONS (2017) National Population Projections: 2016-based statistical bulletin
[684] OIPA (2016) The UK's Ageing Population: Challenges and opportunities for museums and galleries
[685] DCMS (2014) Taking Part Survey
[686] OIPA (2016) The UK's Ageing Population: Challenges and opportunities for museums and galleries
[687] JSNA 2015 Brent Overview Report
[688] OIPA (2016) The UK's Ageing Population: Challenges and opportunities for museums and galleries

prescription. Outreach, as a key way to engage with the 85s, is likely to grow in importance – this includes lectures, object handling, art activities and digital technology – particularly as it improves and successive generations become more familiar with it. Smartphone use among 55-75 year olds has increased by 42 per cent over the last five years[689]. Intergenerational work will also be important to combat loneliness and facilitate links between different generations.[690]

Loneliness and social isolation can also result in poor health and well-being. By 2033, 41% of households in the UK will be solo living. These numbers increase particularly dramatically for the over 85s, rising 145% from 2008 to 2033. Solo living and ageing are often related to loneliness. 17% of the over 80s reported being lonely often, compared to 9% of all respondents. Two fifths of people over 65 say television is their main company and almost a quarter don't go out socially at least once a month.[691] The engagement of arts and cultural organisations with vulnerable groups is likely to continue to be key in combatting loneliness and social isolation in the future.

Key Trend 2: Development Pressures on Cultural Spaces

Brent´s population is projected to increase 17% between 2019 and 2040 to reach 400,000 people. While this will create an overall increase in demand generally for cultural amenities, it is the rising price of property in London, fuelled by the capital's growing population and popularity that is likely to put the most pressure on community spaces, heritage sites, workplaces and High Street facilities. Non-cultural uses, such as housing, frequently command higher values, making them more attractive to landowners, and with the New London Plan housing target for 65,000 new homes each year over the next ten years (2019-2029) pressure and competition for land will continue to build in London and in Brent.

Since 2007 London has lost a third of its nightclubs and live music venues, LGBT+ nightlife spaces have seen a 'recent intensity' of closures. London is likely to lose 3,500 artist studios by 2019. According to the Campaign for Real Ale, London is losing 140 pubs a year.[692] While the draft New London Plan introduces policies aimed at stemming this tide the pressures on land use are going to continue, and London can expect to lose more of its cultural spaces.

Demand for housing may also impact the High Street over the next 20 years. In Brent, planning regulations can be utilised to maximise the High Street's social and cultural value, at least for those parts of the streets that fall within Town Centre boundaries. However, for the peripheral ends of the High Streets, the risk of overdevelopment may increase in line with housing demand. From a cultural perspective, the utility of residential development depends on the type of development permitted: larger residential developments can be a threat to existing businesses while small infill development can stimulate activity, deliver a diverse offer and bring increased footfall.[693]

The Mayor's Draft London Environment Strategy published in 2017 states that he wants London to be the world's greenest city. More than half of London's area is targeted to be green and tree canopy cover to increase 10% by 2050. More quiet and tranquil spaces will also be

689 Deloitte (2017) Global Mobile Consumer Survey 2017: The UK cut

690 OIPA (2016) The UK's Ageing Population: Challenges and opportunities for museums and galleries

691 Ibid.

692 GLA (2017) Culture and the night-time economy, Supplementary Planning Guidance

693 GLA (2017) High Streets For All

promoted. While this should create more outdoor community spaces, it also creates further pressure on existing heritage sites and indoor spaces.

Key Trend 3: High Streets Diversification

The High Street is an important cultural fulcrum of any London borough, and a valued source of civic pride and local identity. As well as providing employment, service and retail functions, it is a gathering place where social and cultural exchanges take place. Almost 40% of High Street businesses go beyond their 'formal' roles to fulfil some kind of social function, such as care and support in the community.[694] The impact of the High Street far exceeds what can be measured in economic terms.

Future footfall will be dependent on the High Streets continuing to remain relevant in the face of competition from convenience shopping and digital consumerism. E-commerce sales are projected to make up more than one-fifth of total retail sales in the UK in 2018, growing to more than one-quarter by 2021.[695] The UK food and grocery market is forecast to grow 15% between 2017 and 2022 and its fastest growing channel is online which is expected to increase by 53.8%.[696]

Londoners attest that the most important features of High Streets are choice in terms of businesses and services.[697] The national trend is for centres to diversify from traditional retail functions to service functions, such as food and drink. This latter category is a major pull across age groups with users expressing a desire for an improved range and quality of experience on London's High Streets.[698]

Londoners currently use a network of local High Streets to fulfil a range of complementary functions and do not necessarily view this as a negative experience - diversity is valued and Londoners are willing to travel within their network to get it.[699] The trend towards a diffuse High Street experience needs to be balanced with the needs of less able residents who are not able to travel to numerous locations, particularly for the growing elderly population. In other words, connectivity is important. The London Infrastructure Plan 2050 outlines a variety of projects aimed at increasing connectivity, including to provide a projected 70% increase in rail and tube capacity in 2050.

In spite of rising rents and business rates, High Streets are significant and growing places of employment – 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 and these numbers are increasing.[700]

Key Trend 4: Growth in Night-time Economy

London's night-time economy is resilient, experiencing continuous growth in recent years. It comprises of activity that takes place between 6:00pm and 6:00am. This activity includes

[694] GLA (2017) High streets For All
[695] Emarketer website UK Retail and Ecommerce: eMarketer's Updated Estimates and Forecast for 2016-2021
[696] IGD website 'IGD: UK food and grocery forecast to grow by 15% by 2022
[697] GLA (2017) High Streets For All
[698] Ibid.
[699] Ibid.
[700] Ibid.

restaurants, bars, clubs, cinemas and theatres as well as the extension of existing day time amenities like libraries, museums, shops, cafes and medical facilities. Some of the reasons given for the long-term expansion in the 24-hour economy are 'growing, younger populations, reform of UK licensing laws, increasing two-worker families and globalisation.[701]

London's night-time economy currently contributes £40.1bn GVA when indirect impacts are taken into account. By 2026 this figure is expected to grow by £1.6bn a year, increasing to £2bn a year by 2030. The growth in night-time jobs is also likely to continue. In London, 109,140 new night-time jobs were created between 2004 and 2016. An analysis by London First suggests that if the share of night-time workers as a proportion of the total workforce remains the same the number could increase from 723,000 today to 789,000 by 2029, and that if the number continues its upward trend this number will be even higher.[702] Locations served by the Night Tube have, in particular, become more viable for night-time activities, and it is predicted to add £360 million to London's economy every year for the next 30 years.[703] The night-time Jubilee line is well placed to improve the night-time economy in Wembley and Kilburn.

Increasing Brent's night-time economy and better utilising existing space such as currently empty basements should maintain business rates contributions, which are at risk as workspace is lost due to permitted development rights.

In future, new residential developments should create less challenges to night-time venues since the inclusion of the Agent of Change principal in national planning guidance in 2017. It refers to the principal that the person responsible for making a change is responsible for managing its impact, mitigating the risk of unreasonable neighbour complaints, licensing restrictions or threat of closure.

Key Trend 5: Growth in Tourism

Visitor numbers to London are projected to grow over the next eight years, which is likely to lead to an increased demand for cultural offerings. By 2025 they are expected to reach 40.4 million, up from 31.2 million visitors in 2016.[704] Despite the challenges created by the recent referendum result to leave the EU, a survey undertaken shortly afterwards shows that most visitors were neutral on the impact it would have on their likelihood to visit the capital.[705] 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'.[706] Both trends provide an opportunity for Outer London boroughs to absorb some of the growing demand for an authentic cultural experience. Brent can take advantage of this demand by better publicising existing attractions, extending its range and ensuring that visitors to Wembley Stadium are aware of what else is going on in the borough.

Demand for accommodation in London is projected to increase from 138.5 million visitor nights in 2015 to 196.4 million nights by 2041 – a 42.9 million increase in international visitor nights and a 15 million increase in domestic visitor nights. Using these figures, it is estimated that London will need an additional 58,140 rooms by 2041, at an average of 2,236 rooms per annum. As this is below the projections for the increase in supply it is tentatively expected that

[701] London First (2016) London's 24 hour economy
[702] London First (2016) London's 24 hour economy
[703] Transport for London (2017) More than GLA - Night Tube boosts London's economy by £171m
[704] London & Partners (2017) A Tourism Vision for London
[705] London & Partners (2017) London Hotel Development Monitor
[706] GLA (2018) Culture for all Londoners, Mayor of London's Draft Culture Strategy

there will be sufficient rooms delivered.[707] Brent is forecast to see an increase of 4.5% demand for serviced accommodation from 2015 to 2041.

Figure 314: Projected demand for serviced accommodation rooms in London to 2014, by borough

Borough	Total change net room demand: 2015-2041	Share of change in net room demand: 2015-2041	Total change in gross room demand: 2015-2041	Share of change in gross room demand: 2015-2041
Westminster	5,559	9.6%	7,365	9.6%
Tower Hamlets	5,158	8.9%	6,832	8.9%
Hillingdon	4,947	8.5%	6,554	8.5%
Hounslow	4,463	7.7%	5,912	7.7%
City of London	4,096	7.0%	5,426	7.0%
Hackney	3,382	5.8%	4,480	5.8%
Lambeth	3,051	5.2%	4,042	5.2%
Newham	3,031	5.2%	4,015	5.2%
Brent	2,622	4.5%	3,474	4.5%
Islington	2,431	4.2%	3,221	4.2%
Croydon	2,243	3.9%	2,971	3.9%
Greenwich	2,233	3.8%	2,958	3.8%
Ealing	2,024	3.5%	2,681	3.5%
Southwark	1,795	3.1%	2,378	3.1%
Camden	1,595	2.7%	2,113	2.7%
Hammersmith & Fulham	1,295	2.2%	1,716	2.2%
Lewisham	1,100	1.9%	1,457	1.9%
Redbridge	990	1.7%	1,312	1.7%
Haringey	879	1.5%	1,165	1.5%
Barnet	767	1.3%	1,017	1.3%
Kingston-upon-Thames	700	1.2%	927	1.2%
Wandsworth	688	1.2%	912	1.2%
Bromley	510	0.9%	675	0.9%
Harrow	347	0.6%	460	0.6%
Merton	345	0.6%	456	0.6%
Havering	342	0.6%	453	0.6%
Bexley	286	0.5%	379	0.5%
Enfield	280	0.5%	371	0.5%
Sutton	280	0.5%	371	0.5%
Waltham Forest	254	0.4%	336	0.4%
Barking & Dagenham	153	0.3%	203	0.3%
Kensington & Chelsea	150	0.3%	199	0.3%
Richmond-upon-Thames	143	0.2%	189	0.2%
Total London	**58,140**		**77,019**	

[707] GLA Economics (2017) Projections of demand and supply for visitor accommodation in London to 2050

Source: AMPM database, GLA Economics analysis

The future growth trends of non-serviced accommodation (such as Airbnb) are unclear. Its rise is reflective of similar growth in the sharing economy, however, it isn't known how regulation may effect it in the future particularly with relation to planning and letting laws.

Key Trend 6: Growth of the Creative Economy

The total number of jobs in London are projected to increase from 5.6m in 2015 to 6.7m in 2041.[708] Creative economy jobs, exports and GVA have up till now been growing faster than any other sector and while up to 30% of jobs in London are at risk of automation over the next twenty years[709], 87% of highly creative occupations are considered to be at low risk of this[710].

Brexit is also likely to impact the creative economy. A report published in 2018 by the Mayor demonstrated that a hard Brexit could cause the creative industries to lose £1 billion of anticipated growth until 2030.[711] However, more than half of the UK's creative service export is to the European Union[712] and one third of creative jobs are filled by non-British nationals.[713] The Mayor is advocating for qualified freedom of movement and for the UK to remain part of the single market to avert this potential loss.[714]

Key Trend 7: Growing Demand for Workspaces

Growth in the British economy, permitted development rights and the demand for residential development has also had an effect on the amount of available workspace. A workspace study commissioned by Brent in 2017 forecast that demand for workspace in Brent will continue to grow, particularly for more creative workspaces where the provision is currently limited. It notes the policy focus placed by the London LEP and GLA on supporting the development of high value industries including the creative industries and points to Brent's proximity to growth areas such as Wembley, the OPDC area, Brent Cross and Burnt Oak / Colindale and connectivity to central London.

Demand for flexible workspace for creative and professional service is predicted to be particularly strong in Wembley and the South east of the borough.

There are growing pressures on London's industrial land, 525 hectares was released for other uses in the last five years (there are approximately 7,000 hectares altogether). The London plan has considered ways of encouraging industrial intensification and co-location with residential uses.[715]

Key Trend 8: New Technologies

Technology is developing at a rapid rate and it is not clear what it will look like in the next 20 years. However, current trends which are likely to become even more embedded within the cultural sphere include those which are opening up and democratising culture (including platforms for events, crowdfunding, networking, and the sharing of self-produced creations),

[708] GLA Economics (2016) London labour market projections
[709] World Economic Forum (2016) Human Capital Outlook - ASEAN
[710] NESTA (2015) Creativity v Robots – The creative economy and the future of employment
[711] GLA (2018) Preparing for Brexit
[712] Creative Industries Federation (2016) Brexit Report
[713] ONS (2017) Breakdown of Creative Economy in London 2012 to 2016
[714] GLA (2018) Culture for all Londoners, Mayor of London's Culture Strategy
[715] GLA (2017) ADD2161 Industrial Intensification study

apps like 'Google Arts and Culture' and the digitization of collections which are reaching a broader audience and expanding how culture is experienced, and technological advances like the advent of virtual reality.

Eventbrite is the world's largest event technology platform with both free and paid events. It allows users to create, share, find and attend new things. In 2017 more than 50 million people world-wide bought a ticket or registered for an event. Meetup is a platform that allows people to create groups around common interests, goals or causes, which hold regular face-to-face gatherings. When users join they express an interest in particular topics and are then shown information about groups near them which focus on these topics. In 2015 meetup had over 20 million users in 192,000 groups in 181 countries.

Over 60% of UK online time is now spent on mobile.[716] Google's Arts and Culture app has been downloaded more than 500,000 times since 2015. It includes an option to use its virtual reality platform (Google Cardboard) to visit some of the best known museums and iconic landmarks in the world. Its other features include Zoom Views which allow users to view artworks in great detail and Arts Recogniser technology, where at select museums, users can point their devices at artworks to learn more about them, including when offline. Other Arts and Culture apps used in London include Culture Trip: Explore and Travel which was tipped by Forbes as one of the British businesses to watch in 2017 and has over 100,000 downloads. It brings personalised content and recommendation around culture, food and travel to users wherever they are, using perspectives curated and written by locals. Street Art Cities maps and displays ephemeral street art, TodayTix allows users to buy discounted theatre tickets and most of the major art galleries and museums have their own apps including floor maps, exhibition information and ticket information. While some of these include digitized collections the future of digitization is unclear, while the V&A has digitized 90% of its collection, the Natural History Museum reported in 2017 that just 4.5% of its 80 million objects were digitized due to a lack of resources.[717] Volunteering and crowdsourcing are being used by some organisations to facilitate digitization.

Younger audiences (in their teens and 20s) are turning away from the traditional social media platforms like Facebook and Twitter to faster moving platforms such as Snapchat and Instagram and private messaging apps such as WhatsApp.[718] While these are harder for organisations to keep up with and utilise in the same way they could promote the sharing and creation of self-produced culture in a whole new way. YouTube is a video-sharing website which is currently ranked as the second-most popular site in the world after google. It allows users to upload, view, rate, and comment on videos, most of which are uploaded by individuals.

Virtual reality is continuing to make progress in the consumer sphere, for example it is already used in Escape Rooms where groups are placed into a challenge environment and given a set time to complete a mission. Other uses include virtual reality spinning classes and it is expected that restaurants will incorporate the technology into the dining experience, allowing customers to choose a location, lighting and music to complement their meal.[719]

Most of these technologies enable "everyday creativity" – diverse practices which take place outside of the publicly funded arts and creative industries. However, in order for people to

[716] Deloitte (2017) Global Mobile Consumer Survey 2017: The UK cut
[717] DCMS, Culture is Digital website
[718] NESTA (2017) Digital Culture
[719] Savills (2016) Megatrends in European Leisure

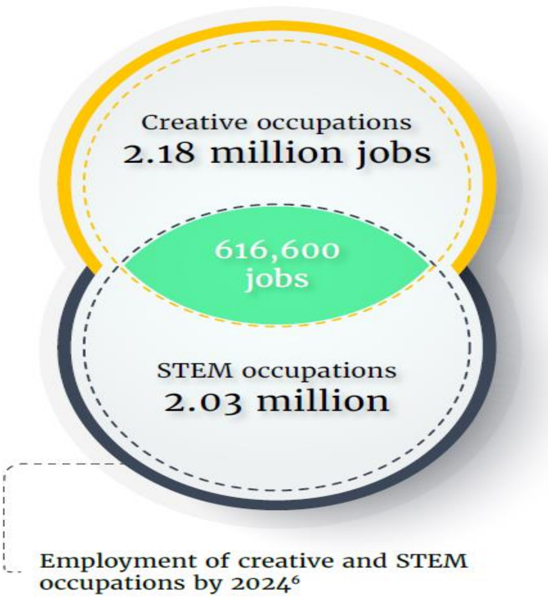
have “widespread, sustained and substantial opportunities…to make versions of culture” it has been shown that particular environmental conditions need to exist. Often being in the same room with others in a supportive social environment is crucial for people to realise their cultural capabilities. Therefore, space will be very important and sometimes paid staff will be necessary, particularly with certain demographic groups, for example people with disabilities.

Within publically funded arts and cultural organisations a ‘plateau effect’ for the impact of digital technology has been noted. Organisations have, since 2015, stopped reporting an increase in the impact of digital technology possibly because it has become more embedded within their organisations. They no longer regard digital technology as ‘important or essential to preserving and archiving, operations, creation, and distribution and exhibition’. However, there could still be said to be growing interest in digital technology as Arts Council England National Portfolio Organisations which receive over £250,000 a year will from this year have to have a digital policy and DCMS are also currently undertaking a Digital policy review. There is an ongoing difference between arts and cultural organisations expected and actual growth in digital activities, such as their predicted expansion into crowdfunding and accepting donations online, possibly because of a lack of staff or financial resources.[720]

New technology has also opened up new markets for many creative entrepreneurs working within and beyond the creative industries. Access to 3D printers allows architects to produce models quickly and efficiently, Virtual reality headsets allow dancers to perform live online. In addition, creativity plays an essential role in addressing big societal challenges – for example, designers are working with engineers and scientists to mitigate global warming by designing user friendly and low-emission transport.[721].

Creative and STEM jobs are projected to grow and there will be a crossover in the growth of these roles.

Figure 315: Creative and STEM job crossover projections



Source: Creative Industries Federation

[720] NESTA (2017) Digital Culture
[721] Creative Industries Federation (2018) Creativity And The Future Of Work

Technology will continue to play a big role in culture over the next 20 years, offering a wealth of creative and cultural opportunities, including employment opportunities.

Key Trend 9: Changing leisure consumption patterns

UK working patterns are constantly changing and this is affecting the way people use their leisure time. Over half of UK workers (57%) work extended hours, part time, flexibly or on a shift pattern. The trend is set to continue as over a third of the youngest working adults desire to work more flexibly in the future. As people seek to pursue their leisure and relaxation at different hours, many services have to yet to catch up and it is calculated that the total potential out-of-hours opportunity for the leisure sector is an extra £6.75bn of revenue. For example, by opening at extended or different hours takeaway outlets could capture a further £2.2bn and pubs and bars £1.2bn. Gyms are one of the businesses doing the best at meeting flexible needs but could still capture a further £143m by improving their flexible offer.[722]

Technological advances have meant that work and leisure lives are becoming increasingly blurred and it is predicted that by 2025, working lunches and after work mixers will become increasingly the norm. Therefore, dining and social spaces will need to simultaneously offer the escape from the office and maintain a relaxed social environment in which people may continue working.[723] There is also likely to be a greater need for social spaces where people can unwind and detach from digital technology on occasion.

The core leisure activities are also changing. A wider range of frequent, habitual leisure activities have emerged alongside the traditional cinema, theatre, bowling, holidays etc.[724] These include music and video streaming subscriptions, gym memberships, betting and gaming, takeaway coffees and food. There are many factors which have driven this. The collaborative economy (Airbnb, Uber, Deliveroo) is growing in significance, technological developments allow consumers to enjoy leisure in their own home, health and well-being is becoming increasingly important and consumers are looking for experiences which either enrich or add convenience to their lives. For example, the amount of people eating two or more meals out of the home daily will increase, but the definition of 'eating out' is changing, with more focus on quick healthy snacks to be served alongside quick sit-down meals.[725] Restaurants will need to adjust to a surge in meal delivery services. Cinemas and health and fitness spaces are expected to be resilient due to consumer interest in 'experiences' and well-being, however, gyms may become more niche and specialised requiring smaller foot prints.

[722] Barclays (2018) Open All Hours? Revealing the untapped leisure spend in the UK
[723] Savills (2016) Megatrends in European Leisure
[724] Deloitte (2018) Passion For Leisure, a view of the UK Leisure Consumer
[725] Savills (2016) Megatrends in European Leisure

Responses

Response 1: Ageing Population

Health and social services should work in partnership with cultural organisations to respond to challenges posed by an ageing population and long-term conditions. Preventative and community based non-medical responses can provide cost-effective ways to treat physical and mental health well-being needs.

Arts and cultural organisations can play a role in mitigating the impact of some of the problems associated with ageing, such as deteriorating health and social isolation. Age UK found that participation in creative and cultural activities provided the largest individual contribution to wellbeing.[726] Dulwich Picture Gallery works with Southwark, Lambeth and Lewisham councils to support the elderly with arts workshops that are designed to combat social isolation by providing a positive environment which promotes wellbeing, resilience and connectedness.[727] The programme has its own co-ordinator, a team of volunteer helpers and a rota of artists. Sessions are attended by up to 20 participants at a time and have included silk painting, lino printing, glass painting, sketching and clay work. Wide brushes are used by participants with deteriorating eyesight and large brushes for people who find it difficult to grip smaller tools due to arthritis in their hands.[728] Programmes like these could be used to support a growing elderly population, provide employment opportunities for artists and also embed arts into the local community.

To continue to take advantage of high volunteering rates amongst the growing 65-74 age group, new policies should take into account their increasing caring responsibilities and later retirement, and encourage greater engagement with lower-socioeconomic groups and BAME people.

To engage with the over 85s, cultural organisations should be encouraged to undertake more outreach work, intergenerational projects and increase their digital engagement as successive generations become more computer literate.

Response 2: Development Pressures on Cultural Spaces

To protect cultural infrastructure, the planning system should be used where appropriate. Measures includes the use of Article 4 Directions, the Assets of Community Value process and Local Plan policy requiring mitigation of reductions in cultural infrastructure caused by new development with on site or offsite re-provision.

One way to protect venues and artistic spaces is to make more use of the Asset of Community Value (ACV) process. ACV is land or property of importance to a local community which is subject to additional protection from development under the Localism Act 2011.[729] The London Borough of Wandsworth has used an Article 4 Direction, which remove permitted development rights to change the use of properties/premises in the identified protected shopping frontages from the uses specified to the uses, to protect 120 of its 177 pubs.[730] It includes all of its grassroots music venues.

[726] Age UK (2018) Creative and Cultural Activities and Wellbeing in Later Life
[727] Dulwich Picture Gallery website
[728] Dulwich Picture Gallery website
[729] CLG (2011) Assets of Community Value – Policy Statement
[730] Wandsworth Council website

To protect Brent's heritage, a full thematic review of Brent's locally listed buildings should be carried out, alongside a review of the borough's conservation areas and a survey of its historic pubs, with a policy to be developed for targeted protection and management of any release.

To increase opportunities for people to create and share their own culture Brent is launching Spacebook - an all-year round online calendar listing bookable, affordable, accessible spaces for various cultural activities. Brent is the 2nd lowest borough in London in terms of median gross weekly income. Free legal art walls, promoting busking, and identifying and supporting cultural promoters within the community are all means of promoting arts and culture affordable and accessible to all.

Alternative uses for existing infrastructure should be promoted, including: exhibition space in cafes/bars/restaurants, holding markets in under-used squares and parks, open-air cinemas, bars/restaurants/small music venues in basements in key night-time economy areas.

To assess how the borough's cultural infrastructure can best meet the needs of its residents, visitors and businesses we need appropriate metrics to assess how they value and experience the cultural offer around them. The borough should employ more qualitative methods to capture data, such as feedback questionnaires and interviews with residents. It should also make best use of the GLA's cultural infrastructure mapping exercising, making an effort to fill in any gaps by collecting our own data.

Brent should continue to develop partnerships with local cultural organisations such as the Kiln Theatre who work with local schools, refugees and offer a number of free tickets every year to Brent's looked-after children.

Response 3: High Streets Diversification

Town Centre Managers should continue to lead on promoting and supporting the diversification of active uses on the High Street, including new spaces for the creative and cultural industries, and an improved range and quality of food and beverage offer.

Planning regulations can be used to mitigate the detrimental effects of residential over-development.

Extending the Harlesden Community Hub Model to other High Streets could reinvigorate their performative social function.

Response 4: Growth in the Night Time Economy

To take advantage of the forecast growth in London's night time economy and make the most of the Jubilee line night tube, Brent should use its licensing policy to extend opening hours, promote alternative evening and night-time uses of existing facilities, encourage bars/ restaurants / live music venues in basements and build on individual area's unique characteristics to make them attractive destinations to visit.

Councils frequently restrict the issuing of late licenses, which undermines the viability of the night-time economy. Noise complaints, which can result in costly enforcement action, may on occasion be better dealt with through more adequate soundproofing of buildings and improved communication between premises and residents.

In 2014, developers building a block of flats near the Ministry of Sound night club were asked to sign a Deed of Easement which prevented future flat owners objecting to noise from the club. This led the developer to provide acoustic protection including acoustic glazing, sealed windows and internal 'winter gardens'.[731]

In Southwark, planning consent was recently given for flats also near a music venue. The Section 106 Agreement requires the developer to make prospective residents aware of the nearby music venue before they decide to buy or rent. The flats have been designed to ensure that residential and music uses can co-exist.[732]

Response 5: Growth in Tourism

To promote tourism in Brent, the Council should work with other tourism partners to formulate a strategic vision for tourism in the borough. This could build on Brent's award of the London Borough of Culture by defining and publicising neighbourhoods with unique selling points, improving food and dining experiences, establishing more festivals and street art.

Brent's award of the London Borough of Culture has prompted popular websites to highlight places to visit in the borough.[733] This should be used as a Launchpad for creating and advertising a comprehensive tourism offer. Similar moves are taking place in the London Borough of Wandsworth, where Tooting hosts a monthly 'Taste of Tooting Tour', with a tour of local independent food businesses, and the chance to meet shopkeepers, restaurant owners and food producers.[734]

Response 6: Growth of the Creative Economy

To take advantage of the forecast growth in London's creative economy, Brent must encourage existing creative businesses to remain in, and new creative businesses to locate to, the borough. Existing workspaces and venues must be protected and local creative needs recognised, assessed and addressed. New creative and cultural spaces of different sizes should be developed in suitable locations, and new providers and partners engaged to accommodate and support local creative talent.

Business support, access to finance, and educational and community initiatives, should be layered on top of harder physical infrastructure, to develop a more integrated approach to stimulating and growing the creative economy in Brent.

There has been a big drop in people taking arts subjects at GCSE since 2010. A long-term learning programme is to be established in Brent schools to stimulate them to place culture in every classroom.

To challenge the negative perceptions around career prospects in the arts, the council should actively encourage the promotion of arts careers through mentoring schemes and communications which highlight their economic viability and variety.

To counter-act the lack of diversity in the creative economy Brent will host the Mayor's new creative leadership programme for young people from diverse backgrounds, which is designed to give them the chance to develop creative careers and businesses. The GLA's Digital Talent Scheme is investing £7 million to help 18-24-year-old, particularly women and Londoners from diverse ethnic and disadvantaged backgrounds, to obtain the skills required for digital, creative and technology occupations.

[731] GLA (2017) Culture and the night-time economy
[732] GLA (2017) Rescue Plan for London's Grassroots Music Venues
[733] Visit London website
[734] Taste of Tooting website

‘Brent Makes Music’ is an example of providing opportunities for young artists, it involved 1,500 young musicians performing a musical showcase at Wembley Arena.[735]

Response 7: Growing Demand for Workspaces

Brent should continue to secure a range of different affordable workspace for artists in suitably located new development through the planning system, leveraging planning gain, grant funding and private finance. New delivery models and partnerships should integrate business support services, access to finance and the fostering of community initiatives into new development, to support local talent, intensify creative activities, maximise business and employment outputs, and stimulate and grow the creative economy.

The Council should decide whether its long term interests in the borough make it strategically placed to meet demand for new workspace, and to take a more active investment and management role in new workspace, for example through development of its own land and assets or acquisition of new workspace in new development.

Brent should encourage the development of creative clusters in suitable locations, such as those in the Alperton and Wembley growth areas, and the provision of new creative workspace in Town Centre locations.

Article 4 Directions prohibiting Permitted Development from office and light industrial uses to residential use (without the need for planning permission) came into force in August 2018 in the Wembley and Alperton regeneration and growth areas and on Local Significant Industrial Sites across the borough. These Directions will help to both protect employment uses in these areas, and ensure regeneration and redevelopment is planned and structured to maximise efficient land use, rather than in an ad hoc, less comprehensive pattern.

Brent has already delivered plans to support artists with affordable workspace. Second Floor Studios and Arts (SFSA) in Wembley has 26 affordable artist studios[736] and the Artists Studio Company (ASC) in Alperton includes 27 new affordable artist studios plus bench spaces[737].
As well as providing affordable studios which are prioritised for resident local artists and creative practitioners, SFSA and ASC are also delivering a range of educational and outreach programmes.

In East London, the Bow Arts Trust provides space that addresses housing as well as workspace costs for artists and creatives. The collaboration with Registered Provider Poplar HARCA is designed to support artists and promote culture within the community using a social enterprise model.[738] Charges are based on affordable social housing rates and the scheme intends to help artists thrive economically as well as artistically. Two-thirds of the artists’ rent contributes to the running costs of the scheme and a third goes towards a community arts fund that delivers a programme of high quality, sustainable community art projects for local people throughout the borough.[739]

Bow Arts is within an area of higher social housing and they have focused on providing highly visible, small, self-contained community art projects which have introduced the artists to the area and raised the profile of the scheme. As well as bulb and shrub planting, the artists also taught printing techniques to Bengali women whose products were then sold out of previously empty shop units. This helped the economic regeneration of the area and empowered a local

[735] Brent Council website
[736] Second Floor Studios and Arts website
[737] Artists Studio Company website
[738] Bow (2017) Arts Annual Report
[739] Ibid.

community group as residents moved from workshop participants to businesswomen. Bow Arts is the first scheme in the UK to develop a long-term partnership between the studio sector and a social landlord.

Co-working spaces where office buildings and workspaces are let on flexible and short terms to start ups, microbusinesses and SMEs are becoming more common in the UK. 'Makerversity' in Somerset House provides a range of co-working options for professional 'makers' including designers, engineers, entrepreneurs, technologists, inventors, craftsmen, technicians and artists.[740] Their aim is to bring together people with all kinds of creative and technical expertise. As well as a working space they provide making workshops, machines and tools and run learning programmes for young people to inspire creative, practical minds and increase the diversity within the creative industries.

Response 8: New Technologies

To build upon the online networks, event platforms and online sharing and production of self-produced culture Brent has created Spacebook to enable groups of people to book tangible spaces where they can support each other to realise their cultural capabilities.

To increase the visibility of Brent's businesses and attractions, the council should encourage its business and institutions to use event platforms, improve their mobile presence and work with popular cultural apps such as Culture Trip and Timeout to increase their coverage.

Brent Start should make better use of social media to publicise its creative education courses and the work of current / former students.

Cultural organisations should be supported to use crowdfunding and accept online donations.

Response 9: Changing the Leisure Offer

To accommodate changing working patterns Brent should encourage the growth of its 24-hour economy and promote more flexibility in leisure opening hours and offers in general.

Flexible offers are already prevalent in the fitness industry. These are designed to fit around consumers' lives and time constraints, and include class passes and 'pay as you go gym' apps. Other examples include pubs offering regular special activities such as ping-pong and themed quizzes as part of daytime opening or hotels and other establishments introducing afternoon tea[741].

Response 10: Promoting Inclusivity

To promote the widest possible access to culture, Brent should incorporate into its policies ways to improve inclusivity. This includes taking into account low rates of sports participation amongst residents from lower socio-economic groups and those from BAME groups, low library use amongst boys and young black users and low rates of volunteering amongst BAME groups as well as barriers experienced by the over 85s, people with disabilities, those on low income and people who do not speak English well.

Possible responses include library programmes specifically designed to promote inclusivity through use of relevant materials and role models; outreach programmes for the over 85s; closer partnership working with community organisations; and the use of initiatives like 'Our Parks' which are funded by Local Authorities and bring free group exercise classes to local

[740] Makerversity website
[741] Barclays (2018) Open All Hours? Revealing the untapped leisure spend in the UK

parks. The main reasons people give for not participating in sport are not having enough time and the cost. Using our parks for markets and open air cinemas could be one way of funding such an initiative.

In Yorkshire, The Max Card, a discount card for foster families and families of children with additional needs, has been introduced. Families with the card can obtain free or discounted admission. It is designed to help these families save money on 'great days out' and mitigates the risk of children with additional needs needing to leave unexpectedly. This same rationale has seen 'relaxed' performances in theatres for families, where children with certain conditions and impairments will be more comfortable.[742]

The Agency is a collaboration between Battersea Arts Centre, Contact Theatre and People's Palace Projects which combines the arts with job focused skills by using art techniques to develop business ideas and entrepreneurial skills amongst young people from some of the most disadvantaged communities. Building on theatre techniques, the project also includes mentoring, pitching sessions and potential investment. It has been highly successful in involving people who would otherwise have been less likely to engage, especially young men from black and minority ethnic backgrounds.[743]

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[742] My Max Card website
[743] People's Palace Projects website